

TIPS FOR HOLDING VIDEOCONFERENCES

Kindly note this document is a translation and adaptation of a document drafted by AGRIDEA. More information can be found on AGRIDEA's [website](#).

1. Introduction

When sessions can no longer be conducted physically, the use of digital tools becomes a necessity. Sessions organized via digital tools are called video conferences. Since it is well known that all beginnings are difficult, this document presents a quick summary of the most important tips and tricks that contribute to productive and goal-oriented online sessions. Here, too, the rule is - if you don't dare, you won't win. What may seem funny and strange at the beginning, becomes a full-fledged substitute for face-to-face sessions with increasing practice (at least in terms of content).

2. Recommendations for Organisers

a. Before Implementation – Technical aspects and infrastructure

- It is essential that **you have tried out the selected tool yourself**. You need to know which functions/options it offers - the following functions are often particularly important: chat functions - what can I, as moderator, determine, what is possible for participants; screen sharing - is it possible, who can/may do that; whiteboard, simultaneous work/commenting possible; designing and using surveys; controlling or releasing audio/video of participants; overview of participants; creating and assigning group rooms (break-out rooms) for group work; automatic invitations possible? Generating the link; Access - do participants need to download something to participate; Possibility to make recordings where, how will it be accessible afterwards?
- Consider beforehand **which of these possibilities must / can be used when** (for which item on the agenda); with inexperienced participants, limit to a few if possible.
- **Do tests with the device that you use at the meeting itself**. Some tools have different functions for use on iPad than on PC! Moderate with a large screen if possible – it offers much more overview (and you can see all participants with video) and can have chat and participant overview etc. all activated and visible.
- With regards to your privacy, remember what you see in the **background** (sometimes it can be hidden, e.g. in Microsoft teams, but it changes the face of the participant) - possibly create/select a neutral background.
- Choose a **quiet room** where you are not disturbed and where no other people are active (e.g. no glass pane with people behind it).
- **Invitation** via a link. This link can usually be generated once you have planned/defined the meeting (time, duration and other parameters). Some tools automatically generate an invitation mail with the invitation link and all necessary instructions and information in it. Only the recipient email addresses have to be used. Or an invitation link is generated, which can be copied into a (self-

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written) mail. Send the invitation mail/link for the video conference to the participants, preferably with minimal instructions and some help on how to use the link.

- **Login/test** (15-30' before the start) - Either before the session, with many or inexperienced participants (who might be using the tool for the first time), a special test on another day has proved to be useful to explain the functions of the software. The test also shows whether the **participants have access to the chosen tool** (certain tools, e.g. Skype, are blocked by some companies for security reasons). If not, it may be necessary to request permission to an IT department or, if necessary, to participate with a private device. Requesting approval from an IT department can take days/weeks, so it is important to clarify any hurdles well in advance.

b. Before the Implementation – Planning the Process and Moderation

- **Distribute the agenda and documents** with relevant information in advance by e-mail so that participants can prepare themselves. For each agenda item, define the subject of discussion/proposal and the goal, so that it is clear what needs to be decided/discussed. Otherwise, a video conference is likely to be derailed and there is not enough time to address all the necessary issues.
- For participants, concentration will be lesser than during physical sessions. **Prepare regular short breaks and/or other interruptions** (e.g. questions, perhaps a question or a question-and-answer session) are essential. After 1 to 1.5 hours at the latest, take a 10-30' break. Divide longer sessions into several shorter sequences. Planning a session that lasts a whole day online is not recommended.
- Clarify exactly in which form the **documentation** of the conference should be done. Write down the minutes or record the online session (Audio). In case of recording, it is mandatory to inform the participants at the beginning of the recording. Attention - recordings eat up a lot of memory and can be large files. Check whether there is enough storage space available and clarify how easy access is afterwards (depending on the tool this can prove a bigger challenge or be available only in paid/upgraded versions). A written protocol can be created by a secretary as usual on the PC and, if necessary, can be checked in real time by those present via screen sharing. Simultaneous moderation and logging is much more complex online than in "real" life! **Absolutely delegate!**
- In meetings where questions are to be collected and answered or complex things are discussed, it is easier to **moderate in pairs**. One person can concentrate on collecting questions, the other on "working through" them.

c. During the Execution/Moderation of the Video Conference

- **Open the virtual meeting room** at least 30 minutes before the start of the video conference and ask the participants to log in at least 15 minutes earlier so that everyone is technically (audio/video etc.) ready for the start of the session. During this lead time, make sure that all participants enter a "display name" that is clear (no abbreviations or nicknames).
- **Before this lead time**, prepare all the necessary materials yourself, so that you don't have to do anything during this "introductory period".
- Turn off **noise sources**, close doors and windows. Consider displaying a clock which is always visible for easy time management.
- At the beginning of the video conference you should **announce the specific rules**:
 - Switch off microphone when not talking (can be done by the moderator if necessary)
 - Give a sign when you want to contribute (or hold up your virtual hand when zooming) - virtual hand is important when the number of participants is relatively large and not all videos can fit on one screen (especially when moderating on a laptop without an external screen) or on the iPad.
 - If the connection is poor, switch off the camera to save resources - in this case a photo of the person concerned (instead of the video image) is helpful to keep track of the situation.

- Repeat and **summarize decisions at the end** - so that they are clear to everyone.
- Make sure that the moderation is clear.
- If necessary as moderator switch off the microphones of the participant (function - switch off audio for all)
- Announce break(s) and specify "return time" with time (not "in 10 minutes" but at 13:40). At the beginning of the break, inform participants that they switched off the microphone and camera during the breaks; this can be especially helpful for home offices.

d. Further Tips

- To work on a document, the **screen can be split** so that everyone can see the text. For some tools, the moderator must grant the right to do so.
- **Virtual pin boards** can be used to work together as on a "real" pin board. With pinup.com, for example, all session participants can go to the corresponding website via a link and collaborate in real time.
- A photo of the screen with the participants can replace the **attendance list**.

3. Recommendations for Participants

a. General Preparation

- A **quiet room** is the basis for concentrated work.
- For your privacy, remember that the **background** can be seen (sometimes it can be hidden, e.g. in Microsoft teams, but it changes the face of the participant).
- Use a **headset**. This gives less feedback, you can be understood better, there is less background noise and you hear others better. Instead of using a headset, you can also use the headphones with the microphone of your mobile phone (e.g. iPhone).
- **Dial in early and test**. Most tools have a way to test the microphone and speakers. Attention - Invitation links usually only work when a moderator is in the virtual room. So it is possible that the link "does not work" or an error message will appear if you receive it days in advance and want to try it out. Therefore, please test in the open time before the meeting or during the special connection test times that are specified.

b. Ensuring a Good Connection

- Ensure that you have a good connection to the Internet and that it is not overloaded: if possible, use a cable connection, not WLAN. If WLAN is used, keep the distance to the WLAN router small;
- Close all applications that need connection resources, such as Skype, Netflix, Facebook, etc;
- If the connection is bad during the webinar, switch off your own camera, so that at least the sound quality is good, or dial in by phone. You can usually find the corresponding telephone number in the invitation mail;
- It is recommended that at least 2 MBit upload and download are available. For security reasons this can be checked at www.speedtest.net;

3.3. During the Webinar – For More Efficiency

Contribute during the webinar to make it efficient:

- For requests to speak - sign up by a show of hands (virtual depending on the tool)
- Switch off the microphone when not speaking.

4. Tools – Some Considerations

There are many tools that can be used to conduct videoconferences. Some of the most common ones are zoom, GoToMeeting, MicrosoftTeams and Skype. All of them have advantages and disadvantages. The offers and functions of the individual tools are always changing. When choosing a tool, it is therefore important to first define exactly what you need and which functions are important for the planned/typical activities (video conferences, webinars and/or other activities). Afterwards, you should inform yourself concretely and promptly which tools are the most suitable for this. In general, however, the following tips can be given:

- Tools that are widely used and successful (have good ratings) are ideal. On the one hand, this has the advantage that (in case of licensing) support is guaranteed in the long term. On the other hand, it is relatively easy to find (video) instructions for such tools on the web in different languages. There is also a chance that some participants are already using the tool or have already made experiences with it.
- The tool of choice should be suitable for all (or most) uses within an organization. This avoids the need to use different tools in parallel (and to be supported by IT).
- It is recommended to use the same tool for internal and external use, so that joint learning is as efficient as possible.
- Attention: Some tools (WhatsApp, Skype, etc.) are o.k. bilaterally or privately, but do not meet certain business requirements (privacy, security). Therefore, some of them are not even permitted for (potential) users (government offices, official educational institutions).
- Tools that work without (or with minimal downloads and installation of software) are certainly best. Participants from companies with strict IT security requirements often cannot participate otherwise (or have to switch to private devices/private WLAN).