

CAST

Practical Guide to Remote Meetings

March 2020
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About this guide

This is an internal guide that supports us to have highly productive remote meetings. Whilst it's been developed and designed for our own use, we're sharing it now as others look to develop remote working. For more information please contact hello@wearecast.org.uk - or if you'd like to speak with someone about remote work please use www.digitalcandle.org.uk.

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1. Introduction

Introduction

This guide has been written by CAST staff, for CAST staff! It aims to help us all have better remote meetings and builds on our great interactions guide.

As a distributed team, remote meetings are an important ritual to build shared understanding and connection, have all voices heard and support each other as individuals to do our best work and contribute to our collective impact as an organisation.

Many members of our team are remote some or all of the time. They should not be at a disadvantage when participating in meetings. When we have a meeting with remote participants, we act as though everyone is remote.

2. Participation

Roles and responsibilities

Chair/ Facilitator

Every meeting should have a chair (usually the organiser) whose job it is to set up the meeting (provide call link, room etc.), keep to the agenda and timings, and to ensure everyone has a fair chance to contribute. They may also keep notes, or delegate this to someone else.

Participants

Before the meeting, everyone should answer the following questions:

- *What's your role in this interaction?*
- *What do you need to take away?*

It's okay to just be there to listen without contributing if you think it's a good use of your time. Think of international meetings where heads of state are having the discussions but their aides sit in and take notes.

Collaboration and feedback

Collaboration

Collaboration is a key element of team meetings and it's important to ensure that everyone feels included and has the tools to contribute.

If there are any remote participants design the session and act as if all are remote - that way the collaborative exercises will enable everyone to participate. This might mean not using post-it notes, but [online tools](#).

Feedback

Give as much positive feedback as you can and do it in a public way. Don't undermine, criticise, or show people up in front of others. Give negative feedback in the smallest setting possible, one-on-one calls are preferred, they allow nuance that text alone doesn't.

Negative feedback is distinct from disagreement. If there is no direct feedback involved, strive to discuss disagreement in a public channel, respectfully and transparently.

3. Running the Meeting

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Before the meeting

Use the [set up checklist](#) to make the most of your time together

- Who gets to speak: in any discussion, only the person invited by the chair/ facilitator to speak next, should be speaking. Everyone else should listen without interrupting, and raise their hand if they want to speak ([see hand gestures](#)).
- Everyone should join the call with video on: join from your own device where possible, even if you're in the same room as others. No more than two people should share one device so that faces are visible and audio is clear ([see technical setup](#)).
- Recording a meeting: If a meeting is being recorded, this should be made clear in advance and stated in the meeting 'I'm turning recording on now'. If anyone joins late, they should be reminded that the meeting is being recorded. Recording meetings (e.g. PlayBacks) can be really useful for those who can't join 'live' - however, we also want to ensure that the act of recording doesn't turn the session into a performance and still facilitates open/honest conversation. For this reason we set rules about how recordings will be used.

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During the meeting

Use the [check-in](#) to connect as individuals and the [share tool](#) to explore and make progress

- The meeting chair/ organiser guides the conversation: they should take care to ensure that discussion in the meeting is not dominated by the people in the room, and should monitor the video gallery carefully to call on remote participants who want to speak.
- Use hand gestures: we use [hand gestures](#) to ensure that meetings are not dominated by those who shout the loudest and interrupt the most.

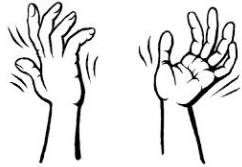
After the meeting

Use the [wrap up tool](#) to end well and know what's next

- Thanks: Thank others for being part of the session
- Share: if there are any shared resources (e.g. meeting notes) or collaboration activities that were used during the meeting, be sure to share this with participants if this is what was agreed; this includes video recordings of the meeting and a list of any actions.

4. Hand gestures

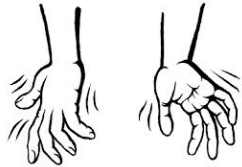
CAST Hand gestures



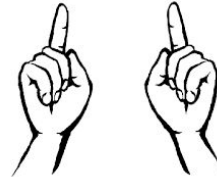
I agree: jazz hands facing upward (see it in action)



I want to speak/ I have a point: hand raised, index finger pointing upwards (see it in action)



I disagree: jazz hands facing downward



I have a point that follows on directly from the last speaker's point: both hands raised, with index fingers pointing upwards



I'm unsure/ don't mind: hold hand up vertically and tilt side to side



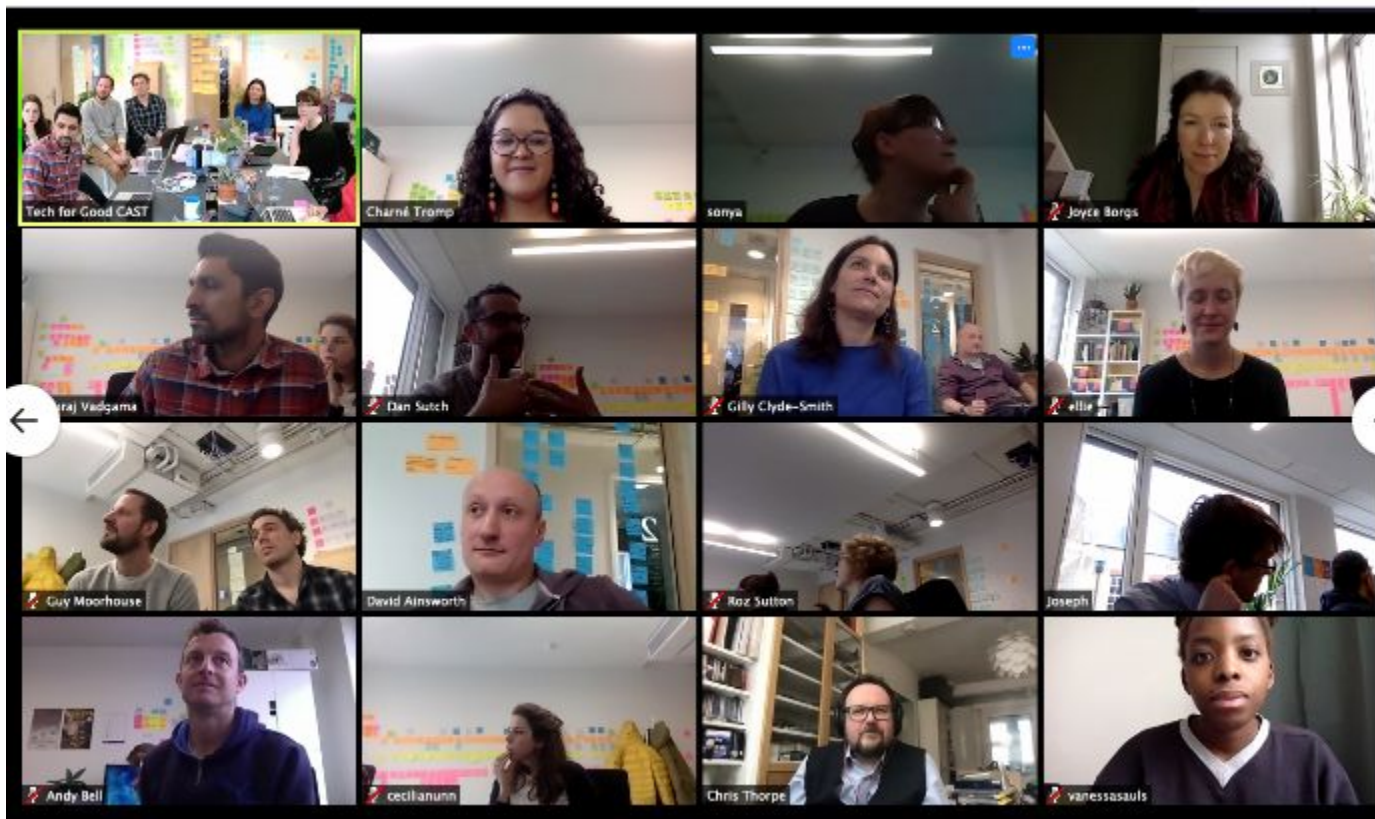
I have a technical point (eg. 'we're short on time', or 'I need to leave'): index fingers on both hands forming a T

5. Tools we use

Online meeting tools

- **Miro**: Who doesn't love a virtual post-it session? You can try out the free version and [here's the pricing plan](#) for the paid versions.
- **Online calendar**: Share your calendar with our team/ make it open to make it easy to connect, see availability and send invites. We use [Google Calendar](#), but other tools exist.
- **Online docs**: Use online documents to collaborate in real time during meetings and create shared agendas and notes during the meeting. We use [Google Docs](#) to collaborate, but other tools exist.
- **Zoom**: There's a free version and it's great for face to face meets. We use the [paid version](#) which removes time limits and other restrictions on the free version. If your wifi signal is weak then you can turn off your video which sometimes improves the line.
- **Slack** can be a chat room for your organisation, designed to replace email as your primary method of communication and sharing. Its workspaces allow you to organize communications by channels for group discussions and allows for private messages to share information, files, and more all in one place.

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Screenshot of our weekly Team Zoom Meeting

WHAT WE USE:	WHY WE USE IT:	OUR TOP TIPS:
<p>Slack (free version)</p>	<p>So that we can message anyone in the team about any topic and read what's gone before. We sometimes use it to call each other too, but prefer zoom for that.</p> <p>We like it because it has a great desktop / mobile app, it's easy to find past messages, it keeps our comms open and it stops our emails getting clogged up.</p>	<p>Set a status (so everyone knows if you're in the office or working from home)</p> <p>Have a #dailyupdate (we call it a 'daily stand up') channel where everyone posts their headlines: What did you do yesterday, What are you working on today, any blockers. We like to get creative with our emoji responses.</p> <p>We have a channel called #funsies for general banter.</p> <p>Don't be a slave to Slack - it's ok to turn off notifications sometimes and give yourself some quiet, focussed time.</p>
<p>Miro (free version)</p>	<p>We love a post-it note and dot voting workshop. Miro lets us run these sessions virtually. It even has a timer.</p>	<p>Like any workshop, you need a facilitator who structures and times the session. When you throw Miro into the mix, the facilitator needs to be able to provide a few technical instructions to the team. To make any 'Miro' sessions inclusive, we assume the attendees have never used it before and explain what to do every time.</p>
<p>Zoom (free version)</p>	<p>We use zoom for video meetings. We like it because the connection is good, sound and video are clear and it's easy to use.</p>	<p>We use hand signals (hand-up to make a point, jazz hands to agree).</p> <p>If one person is remote-working, we all log in separately as if we are all remote..</p> <p>We like to start with a quick round of individual check-ins (anything you're arriving with today, what we're hoping to take away from the meeting).</p> <p>Agree who's chairing, timekeeping and taking notes and actions at the start. It's useful to set up a shared doc ahead of the meeting.</p> <p>Go on mute if you have a noisy background, and turn off video if you have a weak wifi signal.</p>

6. Technical Setup

Audio setup

Multiple participants in the same room

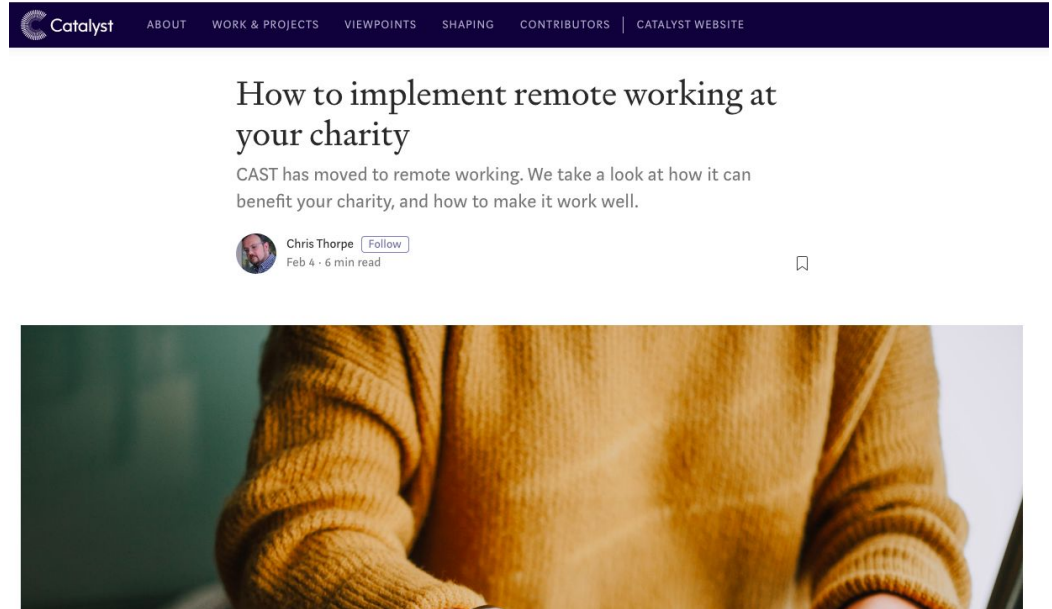
Use one central microphone (like the ones in the office or [similar](#)) or each participant can turn on their laptop mic when they want to speak. Don't use a laptop mic as a group microphone as you'll be inaudible unless you're sitting right in front of the mic.

Individual participant audio

Mute yourself if you've got a noisy background, and use headphones to prevent echoes

Technical setup

For more detailed guidance on our technical setup for remote meetings check out this blog on ['how to implement remote working at your charity'](#).



The screenshot shows a dark blue navigation bar at the top with the Catalyst logo and menu items: ABOUT, WORK & PROJECTS, VIEWPOINTS, SHAPING, CONTRIBUTORS, and CATALYST WEBSITE. Below the navigation bar, the article title "How to implement remote working at your charity" is displayed in a large, dark font. The introductory text reads: "CAST has moved to remote working. We take a look at how it can benefit your charity, and how to make it work well." Below the text is a profile picture of Chris Thorpe, a "Follow" button, and the date "Feb 4 · 6 min read". A bookmark icon is visible on the right side. At the bottom of the screenshot is a photograph of a person wearing a mustard-colored, textured knit sweater.

Thank you

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with digital technology