



Virtual Connection Toolkit for Chapters: A Guide to Hosting or Enhancing Your Meetings Virtually



A Guide to Hosting or Enhancing Your Meetings Virtually

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New to virtual events?

START HERE

Looking for new meeting ideas?

START HERE

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I. Introducing Virtual Meetings

Despite impositions of new norms and other challenges chapters have and will continue to face, chapters hold an ongoing responsibility to serve and provide resources to members at the local level. Now largely unable to conduct regular meetings, educational, and social events, chapters must shift to continue to actively add value to the lives and work of their members. This can be done by introducing and regularly incorporating virtual events.

Virtual meetings and events offer new and different ways to connect and collaborate. But, they don't come without new considerations and layers of complexity. This toolkit includes:

- steps to planning a virtual meeting/event,
- tips for making the most of virtual events,
- unique virtual event ideas, and
- easy to use samples and templates for different types of virtual activities.

Whether your chapter has not met in months, has never held a virtual meeting, or is simply in need of fresh ideas for member connection, this toolkit can help keep your chapter and local members connected.

Please note, this toolkit is not exhaustive. Be sure to check in with your members to get their ideas and feedback on topics, events, or activities that would be most beneficial and/or enjoyable for them. Now, let's get started!

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II. GETTING STARTED: Seven Steps for Planning/Conducting Virtual Meetings

Well executed meetings allow groups to effectively communicate, share information, and accomplish predetermined goals. Here are seven steps to ensure a successful meeting in a virtual space.

1. • Determine purpose of meeting

Answering these questions will help determine the best format and technology needs for your meeting.

- Why is the chapter gathering?
- What need(s) will the event meet?
- What are the anticipated outcomes?
- How many people are expected to participate?

2. • Craft a plan (agenda and technology)

- Build the agenda/event plan** around the meeting's purpose and intended outcomes.
- Allot enough time** to each segment and the event overall. Note, it is advised to keep virtual meetings relatively short, limiting events to a maximum of two hours.
- Respect the agenda.** Include times on the agenda and stick to them. This will help keep your meeting on time and allow attendees to participate as they are able or would like.
- Select your technology platform** and determine how attendees will participate.
- Compile any instructions**, information, or other materials that need to be shared with attendees in advance.

3. • Identify key players and their roles

- Identify what event support is needed** and who will do what based on the agenda/event plan. For example, does your event have various segments or agenda items that will require someone to keep time? Will you need someone to monitor the chat/or messaging function to

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address questions during the event or a Q&A session? What about muting participants with distracting background noise?

- Select an event host/facilitator.** For most events, it will be helpful to have at least have a host/facilitator to open the call, provide an overview, and lay the ground rules for attendee participation. The specifics of what this person needs to do will depend on the type and flow of the event.
- Solicit and/or assign volunteers** to serve in the needed roles.
- Provide volunteers with details** of their respective assignments at least two weeks in advance of the event.

4.

Establish ground rules

Answering these questions will help determine the ground rules for your meeting.

- How do you envision attendees participating to maximize engagement and provide a good meeting experience for all?
- Should attendees have their video on or off?
- Do attendees need to set aside distractions?
- Should everyone be muted and virtually “raise hands” to be acknowledged/addressed? Will questions only be submitted via chat?
- Share the ground rules** in the pre-meeting notification(s) and review briefly again at the opening of the meeting.

5.

Communicate and prepare

- Send virtual meeting invitations** to attendees including meeting date and time, meeting objective and/or agenda, and links to connect with instructions, and any other materials developed in Steps 2 and 4.
- Send a reminder** at least two days in advance to raise awareness and remind attendees to prepare.
- Conduct a meeting run through** with the host/facilitator. They should be knowledgeable of and comfortable with the technology platform and its features being used during the meeting.

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6. It's meeting time!

- Sign into your meeting** with any speakers/presenters, co-hosts, facilitators, or other meeting supports approximately 15 minutes ahead of meeting time.
- Make sure all meeting settings are correct**, microphones, and speakers are working, visual presentations can be seen/shared, etc. As attendees begin to join, all meeting support should be “in position” and ready to operate in their role.
- Be enthusiastic and breed attendee readiness and excitement** that carries throughout the event.
- Thank attendees** for participating in closing.
- Summarize key points or ideas**, and let attendees know what, if anything, to expect in follow-up.

7. Follow-up

- Follow up as soon as possible** to capitalize on the energy from the meeting and increase continued engagement.
- Summarize the meeting/event**, noting any key meeting accomplishments.
- Solicit feedback** on the usefulness of the meeting and ideas for future events.
- Follow up separately with an apology** to anyone who had trouble connecting to the event, though they should also be included in the follow-up to all.



REMEMBER:

Here are a few additional tips to get the most out of any virtual event and create an environment conducive to connection:

- Be willing to try new things –The pandemic has required that your chapters identify new and different ways to meet member needs. Because all are working to figure things out within the new normal, this is primetime for digital experimentation. This includes the following considerations:

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- New platforms/technologies
- New learning/sharing formats (i.e. interviews, panels, breakout rooms, etc.)
- New topics/subject matter
- Understand that everything you try may not work and when it doesn't, be willing to try something else
- Eliminate distractions (and encourage participants to do the same)
- Be aware of how you show up/participate – be conscious of when you need to engage more or pull back (encourage all members/attendees to participate)

III. Tools to Facilitate Virtual Meetings and Events

APIC offers a complimentary Zoom line to chapters to schedule and host online meetings. Chapters can schedule Zoom meetings [here](#)¹.

Using APIC's Zoom line, chapters can:

- Host virtual meetings with live video
- Record meetings to be archived or shared
- Poll participants to get feedback on the event (or other subjects)
- Conduct small groups through use of breakout rooms

To help maximize chapters' use of Zoom events, APIC provides the following tools:

- [Quick tips to maximize Zoom meeting participation](#)
- [Step-by step instructions on how to join/participate in a Zoom meeting](#)
- [Best practices for hosting a Zoom meeting](#)
- [How to conduct polls](#) [How to conduct virtual breakout rooms](#)

Below is a short list of other technology platforms that can be used to host virtual events. This list is informational ONLY and does not constitute an endorsement of any service or company.

¹ <https://secure.apic.org/web/apic/MyProfile/apic-chapter-meeting-schedule.aspx>

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Technology Platform	Use/Capabilities
Anymeeting	Free and low-cost webinars/online meetings
FreeConferenceCall.com	Free teleconferencing; dial-in numbers are not toll free)
FreeScreenSharing.com	Free online meetings; uses freeconferencecall.com for audio
GroupMe	Offers group messaging and conferencing
GoToMeeting	Online meeting, desktop sharing, and video conferencing
No Cost Conferences	Free teleconferencing

IV. Next Level Ideas for Virtual Chapter Events

By no means can virtual meetings and events completely replicate the energy, experience, and flow of live events. However, with a little planning and creativity, they can be a favorable and successful alternative. Below are a few ideas of how your chapter can enhance your existing meeting schedules or formats in the virtual space.

- **Chapter Meeting** with a twist – spin your regular chapter meeting to not only include discussion of chapter business and/or activities but feature educational speakers if/when applicable or allow members to connect and share their stories . If it works for your chapter, consider separating the two and employing a rotation where one chapter meeting focuses on chapter business and/or education and the next meeting incorporates sharing opportunities for your members/IPs. You can also dedicate time in each business meeting for member sharing. Sample agendas for all three are included in this toolkit.
- **Virtual Book/Journal Club (professional and/or leisure)** – connect around a book, article, or topic of interest to share/discuss among the group
- **Happy Hour** – connect with members over a (virtual) drink to decompress and share everyday experiences/thoughts/concerns (Find virtual Happy Hour tips and conversation starters in the NY Times “How to Have a Successful Virtual Happy Hour” [here](#)²)
- **Breakfast/Lunch/Dinner Meet-up** – connect with members virtually to break bread, ask questions, and seek help to your most pressing issues

² <https://www.nytimes.com/2020/03/20/well/virus-virtual-happy-hour.html>

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- **Skill share/swap** (i.e. Cooking, crafting, knitting, exercise – dance/yoga) – allow members (1-2 per event) to share their hobbies and interests/provide instructions on something they're skilled at with the chapter

Other Virtual Event Enhancements:

- Play virtual games/trivia
- Host a virtual team building activity
- Share pre-corded videos (TED Talks, APIC or other webinars, etc.) on topics of interest

V. Hosting a Chapter Panel Discussion

Over the course of the pandemic, we've heard from many members and chapter leaders that IPs simply want to connect, hear, and share stories, and learn how they can help and support one another. A guided panel discussion coupled with breakout groups could be a good way to facilitate this type of connection and sharing.

Hosting a virtual panel discussion may be new for your chapter. However, with the right information and tools, your chapter can create a lively and engaging experience to help your members both personally and professionally.

As part of its IP Wellbeing Series, APIC hosted An IP Panel: Lessons from the Frontline. The webinar featured a panel of APIC members who shared their successes, their challenges, and tips for helping themselves and their teams navigate this new normal. After the panel discussion, participants were able to break into small groups to discuss their takeaways with other APIC members. Your chapter could host a virtual event and share APIC's pre-existing recording (available on the webinars page on www.apic.org) or develop and host a panel of your own.

In Toastmasters International article, [How to Moderate a Panel Discussion – Virtually](#) by Kristin Arnold, twelve steps to offering a successful program are offered. For the full list and details on what each step entails, read the article [here](#)³.

³ <https://www.toastmasters.org/magazine/magazine-issues/2020/june/how-to-moderate-a-panel-discussion-virtually>

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VI. Virtual Meeting Samples and Templates

In this section, you can find templates for virtual event communications, meeting agendas, and a script for a panel discussion. Feel free to modify these templates for your own chapter events.

Virtual Meeting/Event Communications

Below is a basic email template for inviting chapter/prospective members to your chapter's virtual event(s). It includes all information participants need to make joining and participating in the event as easy as possible.

SAMPLE INVITATION EMAIL

Dear Chapter Member, {Personalize with name using a mail merge, if possible}.

The APIC {Chapter Name and Number} Chapter invites you to a {name or type of event}. Join us on {Day, Date} at {Time} to {purpose of event}. Register for the event at {meeting url}. {Other meeting access details, if applicable}.

To make the most of our time, please {prep and/or in-event instructions}. If you have questions or need assistance prior to the event, please contact {Contact name, email and/or phone}.

We look forward to seeing you on {Day}!

Sincerely,

{Chapter Representative Name}

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Online Chapter Meeting/Event Agendas {SAMPLES}

Below are a few sample meeting agendas that can be used for a general chapter meeting, educational session, or member panel.

SAMPLE 1: Chapter Meeting Agenda



APIC {Chapter Name} Chapter Meeting

{Date}

{Time}

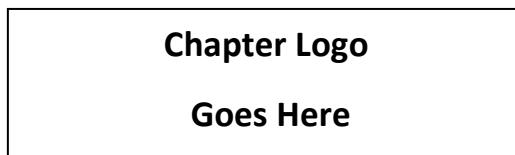
{Virtual Meeting URL and access information}

I.	Call to order/Welcome	3 mins
II.	Chapter Chat (small group breakouts or open share regarding current COVID challenges/concerns/successes)	20 mins
	a. Current organizational issue(s)/challenge(s)	
	b. Questions/asks for help	
	c. Lessons learned	
	d. Successes	
III.	Previous meeting outcomes/action item summary and updates	15 mins
	a. Officer reports	
	b. Committee/volunteer/project reports	
IV.	New Business	20 mins
V.	Wrap-up/adjourn	2 mins

NEXT MEETING: {Enter date here}

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SAMPLE 2: Chapter Education Session Agenda



{Event Title}

{Date}

{Time}

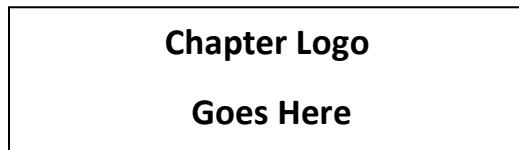
{Virtual Meeting URL and access information}

I.	Call to order/Welcome	3 mins
II.	Speaker/presentation introduction	2 mins
III.	Education Session {Enter session title here}	45 mins
IV.	Questions	8 mins
V.	Adjourn	2 mins

NEXT MEETING: {Enter date here}

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SAMPLE 3: Chapter/IP panel agenda



{Event Title}

{Date}

{Time}

{Virtual Meeting URL and access information}

I.	Welcome	2 mins
II.	Facilitator introduction/program overview	2 mins
III.	Panelist introductions	4 mins
IV.	Panel discussion	30 mins
V.	Small breakout groups	20 mins
VI.	Adjourn	2 mins

NEXT MEETING: {Enter date here}

**NOTE: Sample script provided below*

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SAMPLE: Panel discussion script and questions

**Chapter Panel
{Date}
{Time}
Session Overview/Script**

HOST:

Welcome everyone.

Thank you for taking the time to join us today. We know that this has been a very challenging time for you and IPs in general. We are excited about this opportunity for you to hear from your fellow IPs about some of their most notable challenges and successes and how their experiences can hopefully help you. You will also have an opportunity to break into small groups to share and discuss your own experiences and key take-aways from the panel.

Before we get started, I would like to go over a few housekeeping items for you.

If you are experiencing any audio difficulties, please make sure you have selected only one form of audio only - either by computer or phone.

For full active participation in today's webinar, please join by using the link provided in the email with your computer audio.

If you are still having trouble joining, please go to the Zoom support link:
[https://support.zoom.us.](https://support.zoom.us)

{NOTE: If you're not using Zoom, this should be updated based on the chapter's technology of choice}

This webinar is being recorded and will be provided to our members when it is available.

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If you have questions, please raise your hand or enter them in the chat. We will monitor the participant window and chat for raised hands and questions. We will attempt to answer as many as we can in the time we have together today.

In the meantime, please introduce yourself in the chat by telling us your name and what facility you're from.

Now, I'd like to introduce {insert name and role here}, your facilitator for today's panel discussion.

FACILITATOR:

Welcome to {Insert event name here}. We know how busy you all are and we're thrilled that you've joined us today.

My name is {Insert name}... (where work, how long in IPC, board member, etc.)

Today's panel discussion will last approx. 30 minutes.

After that, we will transition to breakout rooms to continue the conversation.

These will be unfacilitated discussions where you can connect with your fellow IPs more intimately.

We will provide questions to help kick start and guide those conversations.

More details about how to join will be shared at the conclusion of this panel discussion.

Now, let's get to know our panel.

Panelists – 1-2 minute introduction; name, where work, how long in IPC.

- Panelist 1
- Panelist 2
- Panelist 3

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FACILITATOR:

Thank you ALL so much for being here.

While I have some questions to ask our panelists, this is an informal session so we will go where the conversation takes us.

I encourage you to ask questions of the panel via the chat. And, again, we will do our best to get through as many questions as possible.

So, let's get started. My first question to the panelists is:

Q1. The pandemic has created an opportunity for many to pick- up and/or adopt new hobbies. Have you developed any new hobbies or what have you enjoyed doing the most during this time? To all our participants, we want to hear from you on this, as well. Share what you've been doing in the chat.

Other sample follow-up questions:

Q2. Describe the impact of COVID-19 at your facility/in your community. (impact, numbers affected, current state) **OR** Briefly describe the current state of your COVID-19 response.

Q3. What has been the biggest challenge in responding to COVID-19?

Q4. What has been the most surprising or unexpected thing you've experienced during COVID-19?

Q5. If you could give advice to pre-COVID/pandemic self, what would it be? **ASK PARTICIPANTS TO ANSWER IN CHAT**

Q6. What quote or piece of advice has helped you stay afloat during the pandemic that you think could benefit the IPs joining us today?

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LAST QUESTION

To end this conversation on a positive note, I want to pose this final question to our panelists, but also ask that all participants answer this in the chat: As the famous saying goes, every cloud has a silver lining. What has been your silver lining?

FACILITATOR:

Thank you everyone for participating in today's panel and for such an engaging conversation.

Now, for those who are interested, we'll be moving into breakout rooms to continue the conversation. There will be no facilitator in the groups. However, the link to the discussion questions is in the chat. Click the link to download a copy to refer to in your groups. If you will not be participating in the breakout rooms, thank you for joining us and feel free to disconnect now.

All remaining participants will be placed into breakout rooms momentarily.

Breakout group question guide:

1. How are you/your team coping with burnout/pandemic fatigue?
2. Infection prevention and control has had to change during the pandemic – some good, some bad. What's a positive change that you hope is here to stay?
3. Share one of your successes in responding to COVID-19.

***Use these questions to get the conversation started. You can take the questions in any order or let the conversation take you in a different direction.**

NOTE: At the end of the allotted breakout time, bring all participants back to the main room

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FACILITATOR:

Thank you again for your participation in today's discussion. We hope that you've enjoyed our time together and are leaving refreshed with information and tools to help you continue navigating our new normal.

VII. Additional APIC Support for Virtual Chapter Events

A little extra help can go a long way, especially when tasked with doing something new. If your chapter needs additional support in hosting a virtual event to include background/technical support, hosting, or facilitation, we are here to help. Submit your support requests to chapters@apic.org. Support requests should include the following information and be submitted at least two weeks in advance of the event.

- Chapter Name
- Date of event
- Type of event
- Type/level of support needed (what do you need APIC staff to do)