Top tips for running a virtual advisory board

Implementation Science & Practice Advances Research Center

iSPARC

Vol 17 Issue 22   Psychiatry Information in Brief   December 2020

Using a virtual approach can help your advisory board to:

- ☑ Save travel time and money!
- ☑ Provide access for board members with childcare responsibilities, transportation barriers, or disabilities!
- ☑ Reach diverse people from a variety of locations!

SET UP FOR SUCCESS

Videoconferencing Programs: Purchase a program that allows you to set up group video meetings. Many programs include additional features that might be useful, including screensharing, text chat, recording, and breakout groups.

Equipment Check: Check in with board members before the first meeting to make sure that they have a computer, tablet, or smartphone; a webcam; and a microphone. Budget for equipment costs so that advisory board members are not excluded if they cannot afford the needed technologies.

Scheduling: Book your meeting dates at least a month in advance and send invitations (Outlook, Google, etc.) that include the meeting link along with detailed instructions on how to access the meeting (and a password, if applicable). Send a reminder email 1-2 days before the meeting with the link to join.

Tech Lead: Identify a technical lead person who will do check-ins with new members to test their technology before the first meeting, as well as manage any technical issues that pop up during the meeting.

Information Sharing: Circulate the agenda and materials ahead of time. Consider preparing a PowerPoint to guide the session.

Group Size: Think carefully about how many participants to include in your meeting. The ideal size is 5-7 persons, but if your group is already larger, consider planning breakout sessions.

Videoconferencing software can enhance your advisory board meetings through:

[REC]

Polling   Recording   Private Chat   Collaborative Editing

RUNNING VIRTUAL MEETINGS

> **Be Social:** Because virtual meetings can make it more difficult to get to know each other, try to make time for socializing and introductions at the start of each virtual meeting.

> **Ice Breakers:** During introductions or after, try an ice breaker, like a brief trivia quiz!

> **Space for Engagement:** Mention the different ways meeting members can participate in the discussion, such as speaking, using emojis, or sending a message via chat. Many programs will also allow members to chat privately to the facilitator or other members, if they are more introverted or the topic is sensitive.

> **Turn-Taking:** To ensure all members have the chance to participate, the facilitator can call on individuals during the meeting or members can "raise a hand" in the videoconferencing application.

> **Keep It Fresh:** Remember that members' attention span might be shorter for virtual meetings. Try not to stay on any one topic for too long, changing up the content, activity, or speaker every 12-15 minutes, using surveys, polls or other interactive activities can help.

> **Encourage Video Use:** Using video as well as audio can help members to feel more connected. You could even create a fun virtual background for everyone in your group to use!

> **Plan for Tech Challenges:** The tech lead should take a few moments to summarize software capability for members at the start of the meeting, perhaps using a fun poll or question to encourage attendees to engage with different functions. During the meeting, the tech lead can support the presenter by controlling the screenshare or slides, muting background noise, and summarizing comments and questions that come through the chat.

> **Recording:** Many programs will allow you to record a meeting for later review or sharing (with members' permission).

> **Respect Time:** Just because meeting members are already home doesn't mean they have extra time to stick around! Make sure to start and finish on time.

University of Massachusetts Medical School   UMASS

Implementation Science & Practice Advances Research Center — iSPARC — Improving Mental and Behavioral Health Services for Better Lives and Stronger Communities

Mass DMH — Department of Mental Health