EU-FRANK

Facilitating Resettlement and Refugee
Admission through New Knowledge

Migrationsverket

Adapt and carry on:

Lessons and reflections from turning
EU-FRANK into a remote project in 2020

EUROPEAN UNION
Asylum, Migration
and Integration Fund

Content

Executive summary

This report outlines the process of transitioning EU-FRANK into a fully remote project as a consequence of the COVID-19 pandemic in spring 2020, as well as detailing the experiences of long-distance project management from previous years. The COVID-19 pandemic affected roughly 90% of the activities planned for 2020. The affected activities ranged from exchanges with 4-5 participants to the final conference. As the project closed its operations, 12% of activities planned for 2020 were executed as planned, and close to 25% had to be cancelled. This means that just over 60% of activities were adapted to an online format.

The project carried out internal assessments of which activities were possible to adapt to an online setting and evaluated the activities after execution. This led to a SWOT analysis of the use of online activities, which can be summarised as follows:

> *Strengths:* costs; efficiency
> *Weaknesses:* focus and interactivity; technology
> *Opportunities:* time; participation
> *Threats:* underestimation of planning needs; resistance to change

Based on these assessments, the project shares key lessons and recommendations in six areas, as follows:

Tools: online activities require tools and platforms to be properly delivered. Organisations need to assess their needs and should invest in adequate tools. Transnational actors can be a relevant support point in leveraging different alternatives and harbouring solutions.

Flexible thinking with a solid base: online meetings require just as solid planning or more compared to regular face-to-face meetings, but the sorts of details planned can differ. Having gone through the planning, organisations and individuals need to be ready to be flexible and adapt to possibilities and circumstances. An online meeting is not the same as a regular meeting transmitted live, and should not be treated as such.

Structures for continued work: longer projects or meetings series need structures for participants to share documents and other materials. A clear roadmap is key and for longer series/working groups it can be important to have at least one live meeting.

Resources: although demanding fewer resources for travel, for example, online transitions can demand support in other areas such as IT, communication and hardware. Organisations need to be prepared for that shift.

Planning: having solid planning both for the standard meeting structure as well as for how to build interaction is necessary for an online meeting to be successful, especially if people have not met each other previously. Time and engagement are fundamental for thorough planning.

Structures for interaction and decision-making: particularly when working online with teams, having pre-agreed-upon structures for interaction and for how decisions are made and communicated is key to avoid exclusion of members of the group.

Details on each of these areas, further reflections and assessments can be found throughout the report. The Appendix contains a matrix of key reflections and suggestions for a variety of steps when planning for online meetings, from setting the agenda and planning breaks to evaluating the meeting's result.

Introduction

In the spring of 2020, severe restrictions to movement and travel related to the COVID-19 pandemic forced a rapid transition to meeting and working remotely. The EU-FRANK project was no different, but since these were the last months of the projects' activities, it was decided that as many as possible would be carried out in an online format. This report documents the challenges and the effects observed during this change, the process leading to it as well as lessons learned and reflections that can inform and support other projects and organisations going through a process of increased digitalisation.

Background

EU-FRANK, short for European Union Action on Facilitating Resettlement and Refugee Admission through New Knowledge is a project funded by the European Union Asylum, Migration and Integration Fund (AMIF) running from 2016 to 2020. Its focus is on increasing resettlement capacity within EU+ Member States through increased evidence-based studies on resettlement, training, exchanges and State-to-State cooperation[1]. The project was led by the Swedish Migration Agency with partners in Belgium (Federal Agency for Reception of Asylum Seekers and the Office of the Commissioner General for Refugees and Stateless Persons), the Netherlands (Immigration and Naturalisation Service and the Central Agency for Reception), Italy (Ministry of the Interior), Switzerland (State Secretariat for Migration) as well as other actors like EASO (European Asylum Support Office), UNHCR (United Nations High Commissioner for Refugees), IOM (International Organisation for Migration), ICMC (International Catholic Migration Commission) and MPI Europe (Migration Policy Institute Europe).

One of the project's goals had been to create structures for exchange and support based on the premise that getting practitioners together would result in more exchange, more understanding and more cooperation among peers. The project had, before the pandemic broke out, organised over one hundred meetings, seminars, study visits and workshops in Europe, the Middle East and Africa. These gatherings among practitioners were mostly live gatherings, whereas certain steering and working group meetings happened online.

After being granted a six-month extension of the project period to continue operations during the first two quarters of 2020, EU-FRANK had ambitious plans for this period, including closing two networks organised by the project, concluding a seminar series on Monitoring & Evaluation, handling the handover to EASO and proposing a series of exchanges related to selection missions. Most activities were planned between mid-March and end of June of 2020, which meant the pandemic affected almost 90% of planned activities. The affected activities ranged from

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[1] More on EU-FRANK can be found on the EU-FRANK website www.eu-frank.eu.

exchanges with 4-5 participants to the final conference. As a result, 12% of activities were executed as planned, and close to 25% had to be cancelled. This means that just over 60% of activities were adapted to an online format, which shows the relevance of this report.

Objective and audience

The aim of this report is to document the process of shifting EU-FRANK's activities from generally face-to-face and interaction-based to online, as well as to document lessons learn and its impacts on cooperation and overall results.

The target audience for this report is the following:

- The Responsible Authority, with the aim of better understanding the project's adaptation of its activities;
- Practitioners in the area of development cooperation, with the aim of getting insight on how to conduct a quick adaptation to online activities, as well as EASO as the main recipients of the project.

This report is by no means a manual on conducting online meetings or workshops; there are several such documents and books available. The insights provided here are especially relevant for those considering how to adapt and thus for governmental agencies that might have to deal with restrictions regarding programmes, software, connection, budgets and other factors.

How this report is organised

Executive summary
- General overview and main findings/lessons from the report

Introduction
- Background: what is the backdrop of this report
- Why read this report?: aim, target audience and what this report will not cover
- How this report is organised

Challenges and opportunities in online-cooperation
- How the project secretariat assessed and defined which activities to change, which to maintain and which to cancel; impacts on budget
- SWOT-style analysis of using online activities, including mitigating factors and reflections on how to take advantage of opportunities

From remote-managing to remote-acting
- EU-FRANK's background with working remotely pre-covid-19

Lessons learned and recommendations
- Reflections on what the project has learned about the process and key recommendations for an online transition

Appendix

- A matrix with key practical advice for each step of the way in preparing an online meeting – from preparation to evaluation.

Challenges and opportunities in online cooperation

Since its beginning, EU-FRANK had done a significant part of its project management remotely (read more about that in the next chapter). This, however, was not the case for the project's activities – on the contrary, they were based on getting practitioners together at the same place for a workshop or study-visit, exchanging experience and contacts on the way and heading home with a richer network.

When forced to reconsider all the planning for spring 2020, the Secretariat laid out all the planned activities and started by asking two key questions:

- Which of them have an exchange as the most important part, rather than the on-site observation?
- Which can be adjusted to an online format with a minimal loss of content/focus?

As an example of these assessments, here is a brief reasoning around three different activities:

1. Study visit to Uganda: the main objective of the study visit was to get first-hand experience of the work carried out by Canada and the USA in Uganda, how they work with local partners and deliver pre-departure orientation. With this set-up, it would be very hard to get a good grasp of the work on site by doing an online seminar – it would be too similar to other seminars already held on this topic, and the main point was getting first-hand experience on the ground. The activity was cancelled and handed over to EASO.

2. Monitoring & Evaluation Workshop #3: this workshop on formative evaluations was planned as an interactive workshop with a combination of group work and plenary sessions across two days. With the impossibility to travel and having face-to-face sessions (which had proven extremely fruitful for the first two workshops), it was decided to move part of the plenary sessions to pre-recorded interviews, shortening the total connected time, but guaranteeing that the actual workshop period was a time for discussions and questions. Organised in two sessions over one day, with a long break when participants were expected to connect with colleagues for discussions, the workshop offered both pre- and post-workshop activities that could be carried out at a pace convenient to the participants (to illustrate that, consider that the live sessions took a total of 3,.5 hours between 9am and 3:30pm).

3. Focus groups: the project had planned to hold focus groups in three EU-MS and at a minimum of two different field locations. With travel and meeting restrictions connected to COVID-19, those were put on hold until the situation could be better assessed as they did not have the same time restrictions as the

other activities. As the situation became clearer and with several coordination meetings, it was decided to adjust the format to interviews with refugees and stakeholders, providing the necessary data, but in an adjusted scenario. The interviews in the field were cancelled completely due to changes in the scope and logistical challenges, but other countries were added to the study.

Part of the assessment involved understanding what benefits could still be gained from adjusting the activity, compared to the loss of interaction that can be expected from an online meeting. These questions were then followed by a series of others such as:

- How to adjust the **scope** of the activity to an online format, so that the goals of the activity are still achievable?

- How to adjust the **planning** for the activity? This involved for example the realisation that certain aspects needed more time to fall into place on-line, and that even a small activity could take a long planning time in an online setting (compared to for example a simpler administrative demand due to less travel)

- How to create **interaction** between practitioners when you might not even be able to see all of the participants at the same time?

- Which **platforms** are available to EU-FRANK and to participants?

- How to use the benefit of **time** in a creative way? Once you eliminate the need for travel time, how else can you use participant's time? How to best organise sessions to keep the attention span of an online meet-ing and have the activity set up for success even from the participant's perspective? (e.g.: having all participants in a hotel or facility means you have their "full attention" or close to that for the time they are there, whereas working from home means there might be children around, noisy neighbours, household disturbances and other challenges to full concentration. This means one should think carefully about the timing of the meeting to make it possible for as many as possible to attend).

- What opportunities are there in terms of **participation**? Are there people/speakers who would normally not be able to attend due to calendar conflicts that are suddenly available for a one-hour intervention? Is it possible to imagine a new set/group of participants?

The reasoning around these and other questions are fundamental for creating suc-cessful online activities, taking advantage of the opportunities and mitigating the challenges that arise. In order to provide some insight on the project's experiences in these assessments, the next section provides an overview of the challenges and opportunities encountered in an adapted SWOT-format that can hopefully help others who go through similar processes.

SWOT and key questions in the shift to online meetings

A SWOT analysis is a tool used to look at the Strengths, Weaknesses, Opportunities and Threats within an organisation or project, and its general concept can be used for changing situations as well. It helps provide an overview of areas where you can use the advantageous points and where to look for possible pitfalls and problems, in order to address them ahead of time. The analysis below is of course related to EU-FRANK's experience with this transition and, although it can inform and inspire others, it should not be considered exhaustive.

Strengths

Costs: it comes as no surprise that online meeting are less costly than live ones. Not only are there savings on travel and accommodation, but also on the need for hiring a venue or arranging catering. This means that it might be possible to convene more often or to use the financial resources differently.

Efficiency: avoiding travel and general transit makes it more efficient to participate in different meetings/activities, and possible to reconcile such activities with busy calendars.

Weaknesses

Focus and interactivity: the different meeting dynamics and lack of face-to-face contact is one of online meeting's greatest challenges. Many participants and speakers find it hard to focus and interact through a screen. There is also a greater risk that participants will be involved in other activities if the meeting is online since it can be easier for this to go unnoticed. There are a few actions that can be taken in order to mitigate this:

- It is usually better to re-think the meeting, adjusting it to an online format than trying to go through an agenda planned for a live meeting;
- Get acquainted with the platform you will be using and the resources available to know what interactivity tools you might have access to;
- Keep sessions shorter to avoid very long periods in front of a screen and include, if possible, other forms of interaction with peers in between (e.g. phone calls, local group work, etc.).

Technology: there are two main technical challenges when planning an online meeting. The first is that technical failures are impossible to predict, despite one's best efforts and preparations. The second is that some participants might not be familiar or have access to certain platforms. To mitigate these challenges, some actions we suggest are:

- Test the platform and have an alternative plan when possible. This can be e.g. rescheduling or continuing on the phone for smaller meetings, or having a second platform/host available;

- Test beforehand any specific features or tools you intend to use to make sure you understand how they work in a meeting scenario and what kind of problems you might have;
- Give participants a chance to test the platform ahead of time, for example by holding a test-call. Send the necessary information, as well as a technical contact before the meeting to reduce the impact of malfunctioning technology.

Opportunities

Time: alternative uses of time can be one of the benefits of meeting remotely. Not only is it possible to reconcile busy calendars, it is possible to think of a meeting or workshop in a more extended way by combining online and offline activities. A few examples:

- Sharing material ahead of the meeting, in the form of reports, interviews, assignments to read or listen to a programme that participants can do on their own time;
- Creating breaks in the meeting that would be unreasonable if the meetings were live, such as giving an assignment or project and reconvening two days later to provide time for participants to execute in teams;
- Use of longer breaks in between sessions to accommodate parallel work and other assignments if necessary, which can guarantee more focused participation.

Participation: online meetings demand no travel and often not a significant short-term loss of resources. This means that it will sometimes be possible for more people from the same organisation to participate to a meeting or workshop than if it were to happen live, which is a potentially good indicator for sustained change and continued results. There is also a higher probability that both participants and speakers who would otherwise not be able to attend a live meeting due to long travel times and calendar or family matters can take part in an online meeting. That will of course depend on the nature of the agenda, which is why it is important to adjust it accordingly.

Threats

Underestimation of planning needs: it can be tempting to think that, since there are no logistics and bookings to be managed, planning an online meeting is simpler and less time-consuming than planning a live one. This is not necessarily true, and underestimating the need to plan an online meeting or workshop thoroughly can greatly affect the result. Consider the following points:

- Technology can be unpredictable, so time needs to be invested in testing, learning and making sure everything works;
- An online meeting with eight or with 58 people might demand the same level of planning for agenda, materials, flow of the meeting, etc.;

- It is harder to improvise online, so it is important to carefully go through all stages of the meeting;
- It is hard to create interactivity online, and this might demand a good deal of planning;
- The attention span of an online meeting can be shorter than a live one, so the agenda should be adjusted accordingly;
- Materials should be planned thoroughly to make sure they are relevant and the best possible match for the situation at hand. Without the benefit of the live meeting and performance, it is important to make sure that the gathering is relevant and cannot be replaced by an email or just a presentation sent out.

These are some of the issues that affect planning. In order to help with these considerations, see the matrix/lessons learned section in the appendix.

Reluctance to change: adjusting to meeting online instead of live can be challenging for individuals and organisations, evoking resistance to new methods and new ways of working. This can jeopardise performance, preparations and outcome. This being a more psychological and organisational threat can make it challenging to deal with, but some possible ways are:

- Open dialog: openness about the situation and opportunities, as well as about the expectations of the new method is key to setting these expectations at the right level;
- Time and opportunity: it is important to give time for adjustment, when possible, as well as opportunity to explore the possibilities of online meetings and test methods and tactics ahead of time.
- Three essentials: adapted technical tools, collaboration and feedback. Maintaining these will make participants feel more engaged while keeping the meeting productive.

From remote management to remote action: EU-FRANK's background with working remotely

Although adjusting to working online gave rise to a series of challenges, this was not a completely new working method within EU-FRANK. The project Secretariat had, throughout its existence, worked with remote project management as the team was spread around Sweden, with both operational and leadership functions sitting in different locations. This was made possible, among other things, due to previous investments by the Swedish Migration Agency in making remote work possible through well-equipped video and conference rooms, efforts in digitalisation and the flexibility to work across regions.

In addition to the Secretariat, EU-FRANK worked with key staff who were leading specific parts of the project, called Component Leaders (CL) or Pilot Leaders (PL). These were also often spread out, with two of them in different parts of Sweden and a third in the Netherlands. Among the CL, two were based in Sweden (in different locations from the Secretariat) and two others in Brussels. The working groups were comprised of experts from the different partner organisations, which meant that at best there would be a fraction of the working group in the same city or close by. To finalise, the project's partners and therefore its Strategising committee were also spread out around Europe. This provides a panorama of the need for remote cooperation in most of the key areas of the project, which will be explored shortly below.

Secretariat: Structures for online work

In order to get the Secretariat to be able to work on a daily basis as a team based in three locations, it was necessary to create a structure for work and cooperation. EU-FRANK's structure had three main elements:

- A meeting structure informing which constellations of the project met when and for what purpose;
- An (online) "assignment board"
- Regular live meetings to complement remote activities

Meeting structure

The project's meeting structure followed a pattern throughout its life cycle, but the specific meetings that took place and their specific formats varied according to the different phases of the project. In general, the following meetings took place:

- Monday check-in: 30-minute telephone meeting on Monday afternoon to check everyone's status for the week, main assignments and eventually redistribute work among the team. Also a checkpoint for the general state

of mind and checking if anyone was expected to be away from the office or otherwise unavailable.

- Project management meeting: usually on Tuesday afternoons, a one- to two-hour telephone/video meeting between the project manager and coordinator(s). This meeting focused on planning for upcoming activities and follow-up of activities and results, as well as aligning priorities for the project's weekly meeting (this specific focus was added later on and significantly increased the quality of the weekly meetings).

- Weekly meetings: two-hour video meeting with the whole team. This meeting would be based on the assignment board, in an attempt to make sure all relevant topics were covered (see more on that below).

- Monthly meeting: the only fully face-to-face meeting, happened once a month and usually replaced one of the weekly meetings. This was in general a one-day meeting where more strategic and planning-related issues were discussed, as well as work on team dynamics that was hard to do virtually.

Online assignment board

This "board", as it was simply called, was an adaptation of the prioritisation matrix or Eisenhower matrix. It contained two axes, Priority (Y) and Resources (X) that meet at (0,0). Priority referred to the priority level of a task or activity – either because it had a short deadline or because it was very important for the project as a whole. Resources referred to how much resources were needed in terms of both time and personnel to deal with the task or activity. The topics on the board were colour-coded to differentiate the different areas (for example: activities, finances, administration, etc.).

The board was accessible to the whole team and issues would be set up as needed. At the weekly meeting, the project leader or coordinator would go through the board from the top right corner and moving to the left until all issues were covered.

This meant that the whole team would get a thorough update on the most important issues at hand every week, in an attempt to make sure all members had the same information. Such a model was of course not without its challenges. Many complained at times of meeting fatigue or the fact that certain topics would dominate a large part of the meeting, but involved just a few participants. This led to the prioritisation routine by the project management, who informed on focus areas ahead of time, and to clearer meeting rules such as keeping updates short, addressing specific issues in other fora and remembering to take pauses.

Working groups and partners: a mixed approach

The working groups and Component leaders (CLs) had their own routines; much like the Pilot leaders (PLs) did within their own pilots. This report will not focus on the specifics of their internal workings, but rather on how the Secretariat managed these parts of the project.

Simply put, the main elements that made it possible were:

- Document sharing/project management tool (Antura): a document-sharing platform that could be accessed outside of the Swedish Migration Agency's network, where each component and pilot had their own folder for working files and could get templates and other important documents from the Secretariat;
- Weekly/bi-weekly calls between coordinator and CL/PL: the coordination of the project's operations had regular telephone/video meetings to check on status and monitor the work of the groups and pilots.
- Combination of remote and face-to-face: although most of the work was done via email exchange and telephone or video-meetings, the project had planned and budgeted for face-to-face meetings at regular intervals. Those also depended on the stage of the project. Both the CL and PL groups had live kick-off meetings for example, as well as live sessions for learning opportunities or planning. This proved very fruitful and was much appreciated by both groups.

Challenges of remote management

With these experiences at hand, some of the main challenges of this set-up were:

Inclusion of staff: it happened that members of the team or experts felt excluded from certain decisions if made elsewhere among component leaders. This was particularly relevant with assignment leaders, as the Secretariat had more informal channels and formal structures to inform on decisions. This was mitigated with clearer communication and decision-making, as well as creating more opportunity for joint meetings (and face-to-face events).

Time-consuming: decision-making can take longer and be tiresome at times because it is hard to get all stakeholders at the table at once. Similarly, coordinating certain tasks can take much longer when you cannot simply get everyone around a table for discussion.

Suitability: different tasks can be more or less suited for remote work. This was the experience of two of the components: while one of them had a clear roadmap with enough materials to go through and coordinate, another was working with synthesising and analysing documents, which needed to be done in a group. This component experienced remote work as less productive than the first one, and most progress was made at live meetings.

Interaction and socialising: finding ways to socialise and fraternise at work is important to build healthy teams. This can be challenging if there are no structures for this remotely, such as a joint online group where all take part in non-work related chat for example or have a chance to be informally involved with other members of the team. It can also be a challenge when organising activities, such as planning sessions and team-building events, as some members might feel excluded.

Mixed online and offline teams: as it happened with EU-FRANK, it is not unheard of that parts of a team might be at the same location and others at other locations or scattered across different territories. This creates an imbalance in the conditions and opportunity for interaction that has to be considered for a healthy management of the working team. It is a more delicate situation than the one when all members are isolated and only have the opportunity to meet online.

This is a brief summary of the challenges encountered. For lessons learned and mitigating actions, see the following section.

Lessons Learned and Recommendations

This session summarises the main lessons learned in this process and some recommendations based on these lessons. As remote working and the shift to online meeting are not something that is only up to teams and individuals to decide on, but rather require infrastructural support and buy-in from organisations, the following lessons and recommendations should be considered by teams and organisations in the areas in which they have the competence to act.

Tools

Successful online activities and online management require adequate tools to support remote work. These include, but are not limited to, easy-to-use video-link platforms (such as Teams, WebEx, Zoom), document sharing tools (such as Google documents, File Share, etc.), project/team management tools (such as Trello, Slack, etc.) and online interaction tools (whiteboards, mixed-purpose platforms, etc.).

- Organisations should consider investing in a variety of these tools suiting their operations and size in order to enable successful online activities.
- Transnational actors can leverage their position and eventually facilitate the use of some of these tools or promote specific tools that can be relevant for a large group or organisations.

Flexible thinking with a solid base

Working online is comparable to having a new working environment, demanding new ways of thinking through how meetings are done and how the work is planned. However, the basis for success remains the same: preparation, setting of goals, having a clear agenda and defining roles. The difference is that, in a new environment, it might be necessary to go back to basics and clearly define those basic aspects on order to create a good structure for work – e.g., who specifically will open the meeting? Who is going to take questions? Who will keep track of time?, etc.

- Ensure there is a solid planning process, but do not fail to consider which opportunities and possibilities open up once online meetings are on the table in terms of use of time, tools and logistics.
- Have a balance between online and face-to-face meetings when possible. If working on longer projects, consider having a live kick-off, for example, or a live planning session at a strategic point.
- If possible, avoid having a meeting or activity online that is absolutely not suited for an online environment. It might be better to cancel or reconsider.
- Organisations can work together in supporting one another in planning, preparing and developing better meetings together. Making resources and training available can have a significant impact

Structures for continued work

Carrying out projects or longer series of meetings or online work has specific challenges. Some key aspects to consider in such cases are:

- Consider what common platform can be used for the whole group,
- Meet live once to give group dynamics a better chance to develop and settle,
- Have a planned structure for online interaction (this may shift over time, but it has a greater chance of success if it is part of a purposeful decision),
- Ensure there is a clear roadmap for the work that is to be done online/ across the group.

Resources

Although the transition to online/remote work can be linked to reduced costs due to e.g. reduced travel or facility needs, it is necessary to recognise the need for other resources, such as software, cameras, laptops, headsets, etc. and less tangible ones, such as time and capacity to learn and work with the different systems, communication resources, IT resources and more.

- Organisations need to be prepared to increase support in those areas to guarantee the successful continuity of certain operations if they experience a significant shift to online work.

Planning

As mentioned previously in this report, organisations and teams should not underestimate the need for thorough planning of an online activity or event. As with most things, this becomes more of a habit once it is done a few times, but it is easy to revert back to the same planning strategies and methods as before.

With interactivity being one of the main challenges in online meetings, it is also recommended that hosts plan for interactivity throughout a meeting or activity.

It can be useful for organisations to put together best-practice guides and other supporting documents to help navigate this process.

Structures for interaction and decision-making

When considering work within a team, guaranteeing that interaction and decision-making happen in a satisfactory manner is key. If this team is engaged in remote work, these structures become even more important to keep members of the team from being blindsided by events outside of their knowledge or control. Making sure there are formal decision-making channels (and that they are used) as well as suitable informal interaction platforms is key to create healthy and successful group dynamics.

These structures might change and mature over time and one should not hold fast to them just for the sake of history. An assessment of how they are working and what adjustments are needed should be done systematically.

With all this in mind, a final and general recommendation is taking the time necessary to make this transition possible, but facing it in acceptance of its inevitability, at least for the time being. Documenting processes and choices is also a very effective way to build on one's own development and, in doing so, supporting others.

Appendix: Planning and execution considerations for online meetings

Phase	Step	DOs	DON'Ts	Consider that…
PLANNING	Agenda	• Plan in specific times for check-in, breaks and for evaluation at the end • Limit the length of each session so that it does not exceed 1.5 hours • Have a detailed commented agenda • Use variation: have parts of the meeting in a large group and parts in small groups.	Very long sessions in front of a screen make it hard for participants to remain active and focused (and in times when many work from home there can be many sorts of additional distractions)	It can be good to distribute a longer meeting throughout the day so participants have the possibility to take care of other tasks or work in between the meeting or workshop without sacrificing it. Think through who should speak when and in which order, and have this written down. Remember it won't be possible to "catch a person's eye" in the room so they know when it's their turn to speak.
	Material	Consider if there is material that can preferably be shared before the meeting – concept notes, overviews, background and reference material etc.	Avoid sending a large bundle of materials too close to the workshop without warning.	Think ahead of time what you expect participants will do with the material and how they should interact with it. Communicate your expectations.
	Practice	Practice all parts of the meeting ahead and test tools and connections beforehand.	Avoid using a new or revolutionising tool for the first time at a big meeting – test it on a smaller scale or practice beforehand.	There are several tools available for online meetings, so think carefully about what you are hoping to use and practice before. Improvising online is often harder than live.
	Roles	Have clearly defined roles for moderator, panellists, organisers, etc.	Avoid providing too little information to your co-organisers, make sure they are with you every step of the way.	It's important to be clear on what you expect of each person with an active role in the meeting. How will questions be asked? Who takes notes on them? Go through different scenarios to make sure you are ready.
	Collect questions	Collect questions from participants and organisers that can drive the meeting forward beforehand, in case they do not come up spontaneously at the meeting.		
	Test	Test participants' possibility to connect beforehand and prepare for troubleshooting		Have a back-up plan if possible in case many people have connection problems
	Set the rules	Write down the ground rules for the meeting and preferably share them with the participants both before and during the meeting (see point below for a strategy for that).		
	Standard files – welcome and pauses	Create a standard PPT with a welcome message and some ground rules for the meeting, as well as key times for example for breaks and lunch.		It's important that participants know the rules, and if they are familiar with them when they log in, it is great. You can also consider having a **rolling presentation for the breaks**, with interesting information on your project, pictures, quotes etc.
	Plan interactivity	One way of creating interactivity in online meetings is by using purposefully placed questions to be answered using for example emojis or a single yes/no in the chatbox. These should be simple, non-threatening questions and have clear instructions.	Avoid questions that are too complicated or compromising, especially for larger groups that have not met previously. Try not to have a question built in another question as that can confuse participants.	Using simple questions in the beginning of a workshop can be a good way to establish a baseline for the group.

Phase	Step	DOs	DON'Ts	Consider that…
EXECUTION	Awkward silences	As mentioned before, meeting dynamics are different online and not everyone feels comfortable asking questions or otherwise interacting online. Have some questions pre-prepared and think through how you will deal with silences as a moderator/panellist.	Do not expect too much that participants will be able to raise the interactivity of the meeting spontaneously.	
	Online check-in	Be sure to have a designated person to be there for the online check-in, welcome everyone and check for potential issues.		This is also an important moment for quick small talk. Keep it to 10-15 min to make sure most people are connected once it's time to start.
	Use a headset	It is strongly recommended to use a headset for online meetings for better sound quality (in general), but especially if you are a speaker! The microphones of computers generally create a lot of noise and have a very polluted sound		
	Present, do not share	Choose "Present" instead of "Show desktop" to avoid showing more than you should (e.g. email notifications or sensitive documents)	Avoid sharing your desktop with large groups of people for information security reasons	Consider that in some platforms the option of "show file" or "present" creates an online stream that is less prone to tax the system than "Show desktop"
	Be mindful of time	Keep the times you set in the agenda, very important for breaks and for general flow of the meeting +expectations		
	Stand up!	If possible, try to stand up to present instead of the usual sitting down by the computer	Regardless of the position chosen, do not ignore the importance of posture for your presentation	
	"Over and out"	Actively hand over the floor to the different speakers and encourage participants to be clear that they are done		
	Final check	Consider if you need a final check-up with your co-organisers before the online-check-in. If so, use a different "virtual room" as people might decide to connect ahead of time and disturb your check-up.		It is always good to have a quick run-down of the meeting to check on all details and final points, just as you would have for a live one.
	Use of materials during the meeting	Some participants might join via telephone or not have access to video. To make sure they can follow the meeting, send PPTs, PDFs and other files being presented to all participants beforehand.	Avoid having an online meeting based solely on visual aids/material if this hasn't been clearly communicated before the meeting	Remember to, continuously tell what part of the presentation or material you are showing so you involve everyone every step of the way.
	Managing mics and video	Inform participants and speakers on the dynamics for presenting/turning on video and how to do that, as well as whether all who are not speaking should be muted.		Be clear about when people are expected to speak and whether they will unmute themselves or if a meeting administrator will do this.

Phase	Step	DOs	DON'Ts	Consider that…
EXECUTION	Producer, moderator & note-taker	Have a designated person take care of the technical aspects during the meeting (producer) and have another person taking notes. Make sure the moderator also knows what is expected of them and how to coordinate with the others as needed.	Avoid having one person who is responsible for every aspect of the meeting – delegate whenever possible.	Consider that various things can go wrong, and it is important participants feel supported and know whom to contact. Make sure to know what your back-up plan is and that your moderator can guide participants to contact the right person if needed.
EXECUTION	Clear instructions	Be very clear about how the meeting will work, what to do if participants want to comment or ask a question. Ask everyone to mute himself or herself when not speaking.		In live meetings, people are already used to the standard protocols, but these can vary a lot for online meetings. Create a positive atmosphere by reminding everyone of the rules.
FOLLOW-UP	Summary and next steps	If possible, send a quick summary of the meeting /workshop and any immediate next steps straight after the event.		Consider that many participants probably had interruptions or were not 100% present for the duration of the meeting, so a kind reminder with the main topics is very helpful.
FOLLOW-UP	Evaluation	Whenever possible, carry out a quick evaluation before the end of the meeting to ensure a higher participation level. Use a survey link or other anonymous tool if in a large group or you believe people will be shy.	Do not put too much faith in participants completing evaluations after the event.	Knowing what went well or less well is key to be able to adjust future meetings, so do not neglect evaluations.