

## VIRTUAL MEETING MANAGEMENT CHECKLIST

NAF created this checklist to support academies and advisory boards who want to manage and run virtual meetings. Included are the general NAF advisory board goals, work systems and managing meetings considerations, and helpful links. If you have additional best practices or questions, please email [advisoryboard@naf.org](mailto:advisoryboard@naf.org).

### Advisory Board Goals

The Advisory boards' primary goal is to prepare students for success in college and careers by:

- Leveraging connections to raise awareness of the academy and build community support
- Securing and coordinating a sequence of work-based learning experiences (based on the academy work-based learning calendar)
- Participating in a variety of in-person (if possible) or virtual classroom activities and student projects
- Finding, funding, or providing paid internship opportunities
- Collaborating with academy leaders to enhance curriculum and professional development
- Providing strategic leadership and soliciting financial support from the community to ensure academy sustainability

### What You Will Need

- ✓ **Communication** – Determine the board's communication preferences. Some academy leads keep their board updated with weekly emails which include updates and reminders. Who will manage the board's communication and how often? Would calendar reminders help maintain focus on deliverables or upcoming needs?
- ✓ **File sharing** – There are several documents which enable the academy and board to work between meetings such as an academy overview/brochure, work-based learning calendar, Advisory Board Impact Dashboard, member roster with contact information, strategic and action plans, and meeting notes. Ensuring easy access for all stakeholders allows everyone to stay informed and working on goals and deliverables. Identify which file sharing tool, such as Google Drive or Dropbox is preferred, share access, and maintain or update documents together.
- ✓ **Project management** – How are next steps, updates, and reminders shared between meetings to maintain focus and momentum? Is there time allotted in the meeting to focus on discussion and decisions? Work to clarify and agree to processes and tasks.

### How to Run a Meeting:

- **Agree on a technology** platform by briefly surveying academy staff and advisory board members to determine technology available and preferred. There are many platforms available such as Zoom, GoToMeeting, Webex, Skype, Google Meet.
- **Test the technology** ahead of the meeting. Ask participants to join the meeting at least five minutes prior to the start time to get ahead of any technology-related challenges.
- **Use video** to personalize the conversation and keep participants engaged. Always provide an audio dial-in option.
- **Be efficient** by sending an agenda and pre-read materials in advance. Use the agenda, set meeting ground rules, clearly outline next steps (including timing and accountabilities) after each item on the agenda. The Chair or designee should facilitate the meeting.
- **Minimize presentation length.** Background and pre-read information should be shared prior to the meeting to prioritize discussion and action planning for meeting time. Always use screen sharing during presentations to help participants follow along.
- **Reinforce relationships** by kicking off the meeting with an icebreaker, or having a student share out a recent work-based learning or academy experience. Student share-out should be 5-minutes followed by no more than 10-minutes question and answer from board members.
- **Encourage participation** by calling on people, going around the table as decisions are being made, using platform features such as "raise a hand" or "chat box," to capture real-time feedback using polls.
- **Check-in with participants** about how the virtual meeting is working for them and adapt as appropriate.

### Additional Resources

- [Harvard Business Review: What it Takes to Run a Great Virtual Meeting](#)
- [Harvard Business Review: Making Virtual Teams Work: Ten Basic Principles](#)