

# Knowledge Management Research: Virtual Meetings in Child Welfare



Capacity Building  
CENTER FOR STATES

## Research Question

Telework and flexible scheduling are becoming increasingly common ways for public and private entities to manage their workforces. Work-from-home or alternate worksite arrangements allow businesses and agencies to provide additional work-life benefits to employees, eliminate commute times, reduce overhead costs associated with physical work spaces, and, in some cases, streamline workflow by enabling work to be completed in the field.

To support child welfare agencies in transferring select operations online and out of a centralized worksite, the Knowledge Management Team has developed the following questions to guide research to expand knowledge around hosting and facilitating effective virtual meetings:

- ▶ What current technology is available and robust enough to host engaging and dynamic virtual meetings?
- ▶ What practices should child welfare agencies consider when hosting virtual meetings and events?

These questions were used to inform a search of scholarly literature, technical assistance products, agency program and policy materials, and relevant resources from other related fields. Resources reviewed can be found in the “Resources” section. Findings are reported below.

## Available Technology\*

As the quality and capability of collaboration technology increase, several tools for online conference calls and virtual events have become available for individual and institutional use. Tools have differing technical requirements, provide unique features, and are offered at a variety of price points for enterprise licensing.

## Platforms for Holding Small Group Discussions and Conference Calls

Platform	Unique Features and Functionality
<b>Skype for Business</b> <a href="http://www.skype.com/en/business">www.skype.com/en/business</a>	<ul style="list-style-type: none"><li>▶ Is free for Skype to Skype</li><li>▶ Supports both audio and video capabilities to support meetings</li><li>▶ Has app available for mobile users</li><li>▶ Is highly compatible with Microsoft tools, Office 365, and Windows</li><li>▶ Offers recording feature</li></ul>
<b>Zoom</b> <a href="https://zoom.us/">https://zoom.us/</a>	<ul style="list-style-type: none"><li>▶ Features free line for up to 100 participants with 40-minute limit for a single host</li><li>▶ Offers conference calling only or added features: meetings, chat, video webinars, and other applications</li></ul>

\* Note: Inclusion of any particular program, project, process, or tool does not indicate endorsement by the Capacity Building Center for States or the Children’s Bureau.

Platform	Unique Features and Functionality
	<ul style="list-style-type: none"> <li>▶ Is highly compatible, with no downloads or plug-in required for users</li> </ul>
<b>WebEx (GoToMeeting - GoToConnect)</b> <a href="http://www.gotomeeting.com">www.gotomeeting.com</a>	<ul style="list-style-type: none"> <li>▶ Offers free trial for up to 14 days for calls with up to 250 participants</li> <li>▶ Includes meeting recording and transcription</li> <li>▶ Has capability for screen sharing and video conferencing</li> <li>▶ Offers simple plans for voice and video only (GoToConnect)</li> </ul>
<b>FreeConferenceCall.com</b> <a href="http://www.freeconferencecall.com">www.freeconferencecall.com</a>	<ul style="list-style-type: none"> <li>▶ Is free for up to 1,000 participants</li> <li>▶ Offers option to dial in with phone or computer</li> <li>▶ Features HD voice quality</li> <li>▶ Offers capacity to mute and unmute participants or disconnect individuals using a web console</li> <li>▶ Has capacity to broadcast prerecorded audio</li> </ul>
<b>Uber Conference</b> <a href="https://www.uberconference.com">https://www.uberconference.com</a>	<ul style="list-style-type: none"> <li>▶ Offers free basic service, with no PIN required for up to 10 participants</li> <li>▶ Offers option to dial in using phone or computer</li> <li>▶ Has app available for mobile users</li> <li>▶ Offers paid service supports up to 100 participants, with additional feature available</li> </ul>

## Platforms for Holding Virtual Events and Trainings

Platform	Unique Features and Functionality
Adobe Connect with Vantage Point Adobe Connect pod <a href="https://www.adobe.com/products/adobeconnect.html">https://www.adobe.com/products/adobeconnect.html</a> <a href="https://www.refineddata.com/vantage-point/">https://www.refineddata.com/vantage-point/</a>	Adobe: Variety of features and apps to create better virtual participant experience: <ul style="list-style-type: none"> <li>▶ Web links pod</li> <li>▶ Resource downloads</li> <li>▶ PowerPoint</li> <li>▶ Screen sharing</li> <li>▶ Whiteboarding</li> <li>▶ Polls and short answer questions</li> <li>▶ Chat features</li> <li>▶ Presenter-only areas</li> <li>▶ Potential for breakout rooms</li> </ul> Adobe + Vantage Point <ul style="list-style-type: none"> <li>▶ Provides individualized, real-time data on all participants without impact to bandwidth</li> <li>▶ Offers continuous attendance tracking</li> <li>▶ Is fully National Association of State Boards compliant, as required for</li> </ul> Vantage Point accessory package: <ul style="list-style-type: none"> <li>▶ Has zero footprint in Adobe Connect</li> <li>▶ Updates automatically</li> <li>▶ Offers a dashboard that can run on a second monitor or flat-screen TV</li> <li>▶ Includes added data tracking potential, including end user IP information and tech specs</li> <li>▶ Offers automatic webcam capabilities: user only needs to accept</li> <li>▶ Offers end user autonomy over selected breakouts and opportunities to choose multiple breakouts with real-time interaction with subject matter experts</li> </ul>

Platform	Unique Features and Functionality	
	<p>Continuing Professional Education content</p> <ul style="list-style-type: none"> <li>▶ Supports more sophisticated breakout features, including the ability for participants to select their own breakout</li> <li>▶ Offers greater capability for facilitators to identify and troubleshoot technical issues for participants</li> <li>▶ Offers integrated phone support option</li> </ul>	
<p><b>ON24</b> <a href="https://www.on24.com/platform/">https://www.on24.com/platform/</a></p>	<ul style="list-style-type: none"> <li>▶ Offers the option to have social media widgets on registration pages</li> <li>▶ Includes the option to maintain live interactive features, such as polls and links, even for on-demand content</li> <li>▶ Does not require plug-ins, and web-based link is accessible on many different types of devices</li> </ul>	<ul style="list-style-type: none"> <li>▶ Highly customizable landing pages for groups</li> <li>▶ Batch registration for participants</li> <li>▶ Integrated audio and video</li> <li>▶ Recorded breakout rooms</li> <li>▶ Both a virtual environment option and webcast environment</li> <li>▶ Real-time testing/quiz widget to test learners' knowledge gained</li> <li>▶ Speaker bio widget to highlight external expertise</li> <li>▶ Personalized user screen views</li> <li>▶ Integrated closed captioning and translation capable</li> <li>▶ Social media widgets embedded in console</li> <li>▶ 40 points of data per event</li> <li>▶ Capacity to support both regular group meetings and webinars</li> </ul>
<p><b>Blue Jeans Events</b> <a href="https://www.bluejeans.com/">https://www.bluejeans.com/</a></p>	<ul style="list-style-type: none"> <li>▶ Uses browser-based meetings, meaning participants do not have to install any plug-ins</li> </ul>	<ul style="list-style-type: none"> <li>▶ Optimizes the bandwidth consumed by event viewers by caching multiple video streams to a single stream via the BlueJeans Accelerator</li> <li>▶ Allows for live assignment of action items in meetings component</li> <li>▶ Integrates with Microsoft Teams and Skype for Business</li> </ul>
<p><b>WebEx (GoToWebinar)</b> <a href="https://www.gotomeeting.com/webinar">https://www.gotomeeting.com/webinar</a></p>	<ul style="list-style-type: none"> <li>▶ Offers many of the same features of Adobe Connect, including mobile access and no required plug-ins</li> </ul>	

## Best Practices for Virtual Meetings and Events

### Strategies to Leverage Virtual Technology, Overcome Challenges, and Boost Learning

The literature on virtual conferences and communication points to the following strategies to leverage technology benefits, overcome challenges, and foster engaging and effective learning opportunities among audiences:

- ▶ **Build in mechanisms to familiarize audiences with new platforms**, for example, through instructions, FAQs, pre-calls, videos, and technical support.
- ▶ **Design learning tasks to align with the benefits of the virtual space** and to ensure that participants take advantage of available communication avenues (e.g., polls, chat rooms) (Sá, Ferreira, & Serpa, 2019).
- ▶ **Provide space and time for reflective conversations and promote multiple channels for informal engagement** that balance formal presentations (Carr, 2016).
- ▶ **Use breakout rooms** to support small group communication and discussion (Britton, April 2017; Cornelius & Gordon, 2012).
- ▶ **Maintain participant engagement** by adjusting the presentation pace, increasing interactivity, and diversifying activities (Britton, April 2017).
- ▶ **Accommodate different learning and participation preferences** (Cornelius & Gordon, 2012) and allow for customization of the learning experience.
- ▶ **Take time to build trust and connections** (Britton, April 2017), particularly for collaborative work among individuals who have not worked together before.
- ▶ **Integrate reinforcement strategies** to improve retention, including booster experiences (Kohn, 2014), tests (Kohn, 2014), structured peer discussions (Okano, Kaczmarzyk, & Gabrieli, 2018), and other follow up.
- ▶ **Implement hybrid approaches** that take advantage of the best features of virtual and face-to-face interactions (Bower, Dalgarno, Kennedy, Lee, & Kenney, 2015; Sá et al., 2019).

### Etiquette for One-on-One Meetings

As the practice of telehealth visits has grown in the last few years, a wealth of information on how to conduct productive telemedicine visits now exists, including etiquette for professional provider-patient contact. While child welfare agencies are not medical institutions, they deal with many similar issues in regard to the security, reliability, accountability, and professional integrity of their systems. The following is a list of tips on how to hold a professional one-on-one meeting using virtual communication technology. This list is adapted from a telehealth etiquette checklist provided by the National Consortium of Telehealth Resource Centers (Heartland Telehealth Resource Center, n.d.):

#### Appointment Tips

- ▶ Test the equipment. Take time to experiment and practice with the platform.
- ▶ Know where to get technical assistance. Have the number for tech support nearby.
- ▶ Obtain contact information for participants ahead of time, such as direct phone or mobile number, in case of technical difficulties.

#### Video Presence Tips

- ▶ Adjust the camera so that you fill the screen as much as possible instead of also showing your desk, chair, walls, or floor.

- ▶ Avoid wearing fluorescent colors or bright red or white.
- ▶ Keep jewelry small and nondistracting.
- ▶ Keep grooming items (comb, tissue, powder) nearby. Check yourself in a mirror before turning the camera on, especially after a snack or meal break.
- ▶ Keep your site clean and free of visual and auditory clutter. Turn off potential noise distractions such as cell phones if possible.
- ▶ Close door of video room if near a high traffic area. Check lighting in the room. Close all drapes or blinds to prevent glare. Keep the lighting in front of you.
- ▶ Use natural gestures when you speak and avoid too much movement. Smile and talk slowly to the camera, not your reflection in the monitor.

## Audio Tips

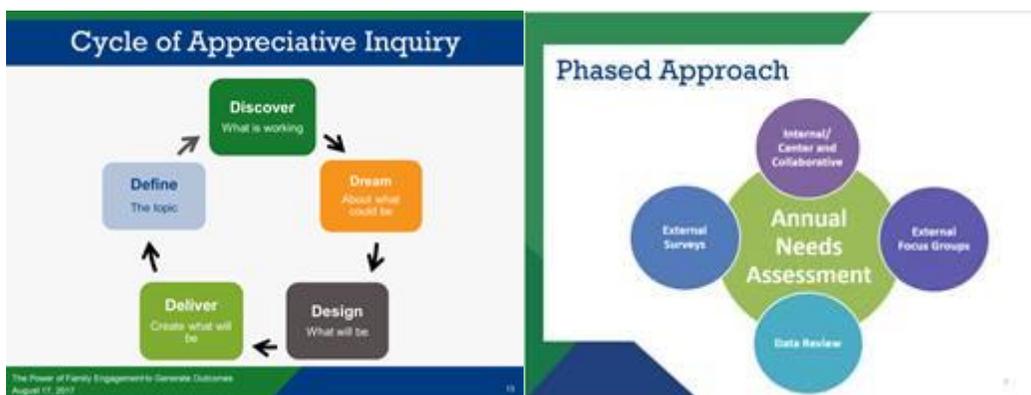
- ▶ Speak in your normal voice without shouting.
- ▶ Check that there are no airflow issues that affect the microphone (fans, air conditioning units, open windows, etc.).
- ▶ Do not place papers or objects near the microphone. Rustling papers is distracting; have your materials in front of you or on a side monitor.

## Enhancing Engagement in a Virtual Meetings

### Before the Event

- ▶ Divide your presentation or session into clear segments, and introduce those segments or objectives at the beginning, including any group interactions that will be part of the segment. This will help set expectations.
- ▶ Integrate an application activity for each segment. This will provide an opportunity for participants to reflect on what they've heard and apply it to their work (e.g., ask participants a polling or short-answer question that helps them apply the knowledge to their practice).
- ▶ Prepare visuals to help illustrate your points or visually represent data, or use shapes and diagrams that illustrate concepts effectively.

Examples:



### During the Event

#### Kickoff:

- ▶ Integrate opportunities for participants to ask questions either through the audio lines or the chat pods in Adobe.

## Visualize:

- ▶ Illustrate complex systems, processes, or teams in visual form. This helps attendees digest complex interrelatedness.
- ▶ Use humorous visuals in your presentations to help the climate feel conducive to engagement, approachability, and interaction.
- ▶ Use polling and survey questions to reengage participants and stay aligned with learning objectives.

## Apply:

- ▶ Allow for questions and answers near—but not at—the end of the session. Control the ending. Close on a positive note that connects the learning to meaningful outcomes.
- ▶ Ask questions to help participants connect the content to their work and consider ways to incorporate the content into a current task or new project.
- ▶ Think about what you would want to be able to discuss with colleagues around the topic you are presenting. Would it be helpful to hear what other states might have done in this area? What they might be struggling with? What strategies have they tried? Carve out time in the segment to have them discuss key questions in small groups.
- ▶ Keep activity instructions clear and concise. For multilayered activities, give instructions for each part separately (e.g., 1. “In your small groups, discuss with the colleagues the challenges you have encountered in trying to plan for sustainability.” Then, 2. “Now that you have had a chance to discuss challenges, share two strategies with the rest of the group to develop sustainability.”).

## Wrap-up:

- ▶ Bring it all together and revisit what you've learned as a summary at the end of your presentation. This repetition helps solidify new cognitive pathways developed in the session.
- ▶ End with a challenge (e.g., provide an opportunity for attendees in a small group discussion to vocalize how the information presented could be taken back to others at home for consideration).

## Resources

### Hosting and Facilitating One-on-One Interactions

#### Telehealth Etiquette Video Series

<https://learntelehealth.org/telehealth-etiquette-series/>

South Central Telehealth Resource Center at the University of Arkansas for Medical Sciences (n.d.)  
*Old Dominion University College of Health Sciences, School of Nursing*

Provides a number of training videos on etiquette for virtual healthcare interactions. Videos focus on maintaining confidentiality, conveying a sense of professionalism, and ensuring interactions are clear from an audio/visual standpoint.

#### 10 Telemedicine Etiquette Tips to Deliver Professional Care

<https://blog.evisit.com/10-telemedicine-etiquette-tips-deliver-professional-care>

lafolla

*eVisit.com*

Describes 10 measures providers can take to host smooth and respectful telehealth visits. Includes suggestions for setting up a professional space, non-verbal communication, professional demeanor and dealing with technology issues.

### Hosting and Facilitating Virtual Meetings

#### The Ultimate Guide to Remote Meetings in 2020

<https://slackhq.com/ultimate-guide-remote-meetings>

deBara (2020)

*Slack blog*

Outlines instructions for scheduling and hosting virtual meetings. This post describes the social needs of meeting participants, technology selection, how to work across time zones, etiquette, and the necessity of follow up.

### **What It Takes to Run a Great Virtual Meeting**

<https://hbr.org/2020/03/what-it-takes-to-run-a-great-virtual-meeting?ab=hero-subleft-3>

Frisch & Greene (2020)

*Harvard Business Review*

Describes 12 steps to running a successful and engaging virtual meeting. Tips include using video and call-in options, testing technology ahead of the event, using an ice breaker, and designating a facilitator.

### **How to Get People to Actually Participate in Virtual Meetings**

[https://hbr.org/2020/03/how-to-get-people-to-actually-participate-in-virtual-meetings?utm\\_medium=email&utm\\_source=newsletter\\_daily&utm\\_campaign=dailyalert\\_activesubs&utm\\_content=signinnudge&referral=00563&deliveryName=DM71994](https://hbr.org/2020/03/how-to-get-people-to-actually-participate-in-virtual-meetings?utm_medium=email&utm_source=newsletter_daily&utm_campaign=dailyalert_activesubs&utm_content=signinnudge&referral=00563&deliveryName=DM71994)

Hale & Grenny (2020)

*Harvard Business Review*

Provides a list of tips for increasing engagement in a virtual environment. Suggestions include providing a narrative of the meeting objective (the problem the meeting is attempting to solve), giving participants a meaningful responsibility to be performed during the meeting, utilizing technology to get work done in small groups, presenting only the minimum amount of data necessary to inform and engage, and attempting to problem solve at regular intervals.

### **How to Have a Virtual Meeting That's Not Painful (and Actually Productive)**

<https://www.fastcompany.com/90304194/best-practices-for-virtual-meetings>

Ng (2019)

*Fast Company*

Provides steps to take to host more engaging and productive virtual meetings suggested by the director of product management for Google Cloud. Tips include preparing in advance, promoting use of video, making direct appeals for input, and sharing successes.

### **The Seven Secrets of Successful Virtual Meetings**

<https://www.pmi.org/learning/library/successful-virtual-meetings-skills-improvement-6267>

Pullan (2011)

*Project Management Institute*

Presents research on virtual meetings and outlines common pitfalls and challenges to holding virtual meetings. This article suggests solutions to common problems, including understanding the limitations of technology, utilizing the appropriate channels through which to share information, knowing the importance of preparation, and maintaining engagement.

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