Guidelines for fair virtual moderation

Using and shaping online communication inclusively

ICG Integrated Consulting Group GmbH

Developed as part of the project FairCom – Using and designing online communication inclusively

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INTRODUCTION

Virtual communication and collaboration has become an everyday topic in recent years, with many practical experiences being made. There are just as many assessments and opinions on the subject of what "works well" and what "doesn't work at all". Being able to coordinate with several people promptly, regardless of location and, if necessary, briefly, is leading to a fundamental change in the way organisations work (home office use).

This brings opportunities and potential, such as the involvement of people who are geographically distant, reduced travelling times and, in the best case, increased flexibility in terms of time. On the other hand, there are challenges and limitations: interpersonal interaction requires particular attention, as the information channels for perceiving the other person are more limited in the virtual environment than in person, and it is more difficult to involve participants and maintain their attention.

Facilitation plays a central role in virtual meetings: it should create conditions that minimise challenges and ensure that various participants can contribute and participate equally.

Promoting fairness and diversity in meetings means creating an inclusive environment in which everyone feels equally heard, respected and has equal opportunities to actively participate. The question is, how can online meetings be designed to be inclusive - through appropriate moderation, methodology and technology?

In this handbook, we provide advice and practical tips on key factors for fair online meeting moderation. This handbook is part one of two products on fair virtual communication - it is supplemented by a set of methods.

We followed these steps to develop the handbook:

- Research: literature, best practices on diversity-orientated online moderation, survey of user needs, focus workshops and interviews with moderation experts
- Evaluation of our consulting practice at ICG Integrated Consulting Group GmbH: we provide an increasing proportion of consulting and training virtually, hold training courses on virtual moderation
- Development of key factors for fair online meeting moderation
- Compilation and development of guidelines based on the key factors
- Practical test and review of the guidelines with moderation experts, incorporation of feedback

A disclaimer on all the technical information we provide: Technical applications are subject to very rapid change, and what is state-of-the-art today may no longer be suitable later. Many organisations also have regulations on which applications can be used. Moreover, depending on the target group, the extent and type of technical tools must be adapted. We therefore ask you to see the apps mentioned here as suggestions and examples and to familiarise yourself what is current, suitable for the target group and usable in your own context.
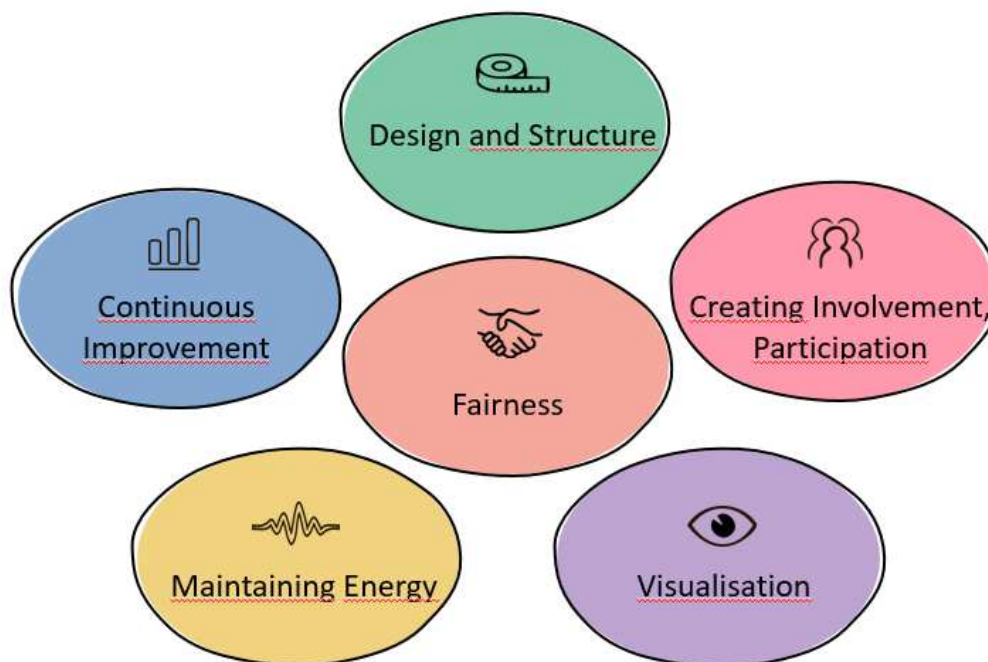
KEY FACTORS FOR FAIR ONLINE MEETINGS

Given the many challenges that virtual collaboration entails, it is crucial to take informed steps as a facilitator to ensure that all participants can engage and contribute equally. In our view, fairness in an online **meeting** therefore means that all participants can participate equally, regardless of their backgrounds and perspectives (i.e. their diversity characteristics).

It therefore seems essential to define key factors as a guideline for facilitating virtual collaboration, which, if taken into account, will make a decisive contribution to promoting fairness with regard to diversity in meetings.

These **key factors for fair online meeting facilitation** comprehensively address the aspects of virtual collaboration that promote the participation of different target groups in virtual settings. Facilitators can thus take targeted measures to strengthen diversity in virtual meetings.

The six key factors for fair online communication and diversity-promoting design of virtual meetings are Fairness; Design & Structure; Creating Participation / Participation; Visualisation; Keeping Energy; Continuous Improvement.

Key factors for fair online communication, ICG Integrated Consulting Group

The key points for each of the key factors are outlined briefly here, with practical tips provided in more detail below.

Key factor: Fairness

This cross-cutting factor links all the others and is at the centre. All other factors contribute to it and promote it.

Promote a culture of fair dialogue and appreciation, create good framework conditions in the virtual world for everyone; establish rules of the game and promote a culture of respectful cooperation; promote "accessibility" for participation: language, comprehensibility, opportunity for participation, etc.

Here are the other factors that are essential for organising and holding a virtual meeting:

Key factor: Design and structure

Create the basis for every virtual meeting/workshop: clarify the objective, agenda, methods, roles, rhythm; select the appropriate process and methods for dealing with the topics; ensure a clear process and common thread for participants

Key factor: Create engagement, participation

Create involvement, enable active participation of all; structure and actively organise the exchange; ensure fair speaking time; improve results through more diverse perspectives - choose a suitable form of processing with methodological diversity for the respective topic in order to achieve the best possible results

Key factor: Visualisation

Create comprehensibility and clarity to make it easier to follow the content; encourage creativity, commitment and interaction; promote interaction through joint documentation, recording and visualisation of results

Key factor: Maintaining energy

Actively shape the rhythm of the meeting - offer methodological variety and diversity - cover different needs; actively shape the rhythm, offer activations; increase activations, attention and commitment and promote a constructive dialogue climate

Key factor: Continuous improvement

Further develop virtual communication by trying out new tools and methods; improve quality through feedback: take a joint look at virtual collaboration, identify opportunities for improvement; introduce new ideas, creativity and variety

🤝 KEY FACTOR: FAIRNESS

Promote a fair culture of dialogue and appreciation, create good framework conditions for everyone in the virtual environment; establish rules of the game and promote a culture of respectful cooperation; promote "accessibility" for participation: language, comprehensibility, opportunity for participation, etc.

Fairness and participation in the virtual setting is evident, among other things, in the distribution of speaking time. It is more difficult for some people to have their say in a virtual setting than in a face-to-face setting. Some people tend to wait for a clear signal from the moderator that they have the floor and are less likely to speak up on their own initiative. Mutual interruptions occur more frequently in a virtual setting, as pauses in the conversation are more difficult to recognise and predict due to the reduction in non-verbal information such as facial expressions and gestures. Sensitive situations are often even more challenging in the virtual space, where many things happen more anonymously. In the event of verbal abuse, switching off the camera or sound can act as protection for the person(s) affected, but also for the person(s) being abused.

Fairness is at the centre of all key factors: If facilitators take all key factors into account in the best possible way, this increases fairness in online meetings.

Fair virtual meetings/workshops are characterised by the fact that fair participation is possible for everyone and the framework conditions for a culture of appreciation and fairness are promoted. Important elements here are recognising the different backgrounds and perspectives of participants and striving to treat everyone fairly.

The facilitator and all those involved in the preparation of a virtual meeting/workshop ensure this by focussing on fairness as a fundamental principle. Facilitators act as role models for fair behaviour that can encourage participants to do the same to create an atmosphere of openness, respect and mutual support in which diversity is enriching.

💡 Tips for moderation methods

A virtual meeting or workshop must be planned with fairness and inclusion in mind. It is important to pay attention to aspects that could hinder fair online communication.

Set the ground rules, provide orientation

- Consider/research in advance what barriers and needs to participation might be present (hearing, sight, language, roles, different needs, knowledge...).
- Round of introductions or list of all participants and their roles: Understanding why everyone is in the meeting facilitates participation.
- Draw up and agree on ground rules and communication rules for fair interaction at the start of the meeting/workshop/virtual collaboration.

- Display and demand these rules at the start of the meeting/workshop and draw attention to any breaches. Possible procedure in the event of non-compliance:
  - Reference to compliance with the common rules of the game. Address if contributions are shared that do not belong to the topic or other disruptive moments occur.
  - Point this out to the person or write to them and draw their attention to the need for action.
  - In the case of inappropriate comments in the chat, address the fact that this content is undesirable and request that they refrain from doing so in future.
  - Mute people who still regularly post/contribute inappropriately and remove them from the meeting as a last resort. [1]
- Prepare how to deal with sensitive situations (e.g. assaults) as a moderator and actively manage the situation.

Starting points for fair speaking time

- Clear meeting structure with clear moderation: What is currently happening, what contribution is required and how long is it?
- Rounds where everyone contributes in response to a clear question: "Please ask each person for one sentence on the following question..."
- Small groups in break-out rooms with a clear key question and work assignment - in smaller groups, it is easier for reserved people to have their say
- Pay attention to the audience during long inputs (keep them focussed)

Making fairness a common cause

- Briefing for all those who contribute: Support people who commit to contributing something
- To maintain a culture of dialogue in the break-out sessions for sensitive topics or particularly diverse groups: appoint moderators for the break-out sessions who ensure that speaking time and rules are adhered to
- Demonstrate a willingness to learn as a moderator and be open to constructive feedback: actively invite people to give feedback to the moderator (bilaterally, e.g. via the chat, during break-out sessions)
- Create good routines in regular short meetings: Establish a culture of collaboration

Fair language

- Guiding/using inclusive/fair language/communication so that all genders are included. Guides and literature on inclusive language provide guidance
  - https://www.nonbinary.ch/pronomen-anwendung/
  - https://nibi.space/geschlechtsneutrale_artikel

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[1] Anzügliche Chatnachrichten, Sexistische Profilbilder und menschenverachtende Kommentare, Neue Herausforderungen in Online-Räumen, Eine Handreichung zur Prävention bei Diskriminierung und Belästigung in Online-Räumen für Studierende und Lehrkräfte, TU Berlin:
https://www.static.tu.berlin/fileadmin/www/10002454/KFG/Dokumente/Handreichung_Praevention_Online_Veranstaltungen_21.pdf

- o https://www.genderleicht.de
- o http://geschicktgendern.de
- o https://queerleben.de/glossar
- o Gender-sensitive language - dialogue at eye level, Ombud for Equal Treatment, Vienna: https://www.gleichbehandlungsanwaltschaft.gv.at/dam/jcr:8029ba34-d889-4e64-8b15-ab9025c96126/210601_Leitfaden_geschl-Sprache_A5_BF.pdf

- Plan a round of introductions at the beginning to clarify aspects such as
  - o Correct pronunciation of the name (e.g. unfamiliar names, confusion between first name and surname)
  - o Desired form of address (pronouns, you/you): It can be helpful here if the moderator introduces themselves with their own pronouns and invites participants to mention their pronouns during the introductions ("Please state your pronouns if you wish."). This should not be enforced so as not to force anyone to come out unintentionally. You are also welcome to explain why this is important: "I don't know your pronouns any more than I know your names if you don't communicate them. They are not something I simply want to assume. This is especially important because I want trans people to feel safe and welcome in this workshop."
  - o At the beginning, point out that participants should make sure that all participants are addressed correctly and are happy to give a hint or correct any unintentional mispronunciation of names or pronouns - also refer to the (private) chat, as this is less of a hurdle than interrupting the discussion in the group.

Adapt procedure, material and technology - fair design of documents in text and images

- Consider/research in advance which barriers and needs for participation might be present (hearing, sight, language, roles, different needs, knowledge...).
- Use technical functions adapted to the skills of the participants so that lack of knowledge is not an obstacle. Use technical tools minimally and with explanations to avoid participants being overwhelmed by having to use too many functions at the same time.
- Design presentation materials to be diversity-orientated (language/gender, examples/image selection...) and accessible. Avoid gender stereotypes or cis- and heteronormative representations, guidelines and literature on this:
  - o Guidelines for gender-equitable wording and non-discriminatory visual language, City of Vienna: [https://www.wien.gv.at/medien/service/medienarbeit/richtlinien/leitfaden-gender/index.html](https://www.wien.gv.at/medien/service/medienarbeit/richtlinien/leitfaden-gender/index.html)

🖥️	Tips for technical tools

Some apps are dedicated to the topic of fair speaking time distribution, we present two of them:
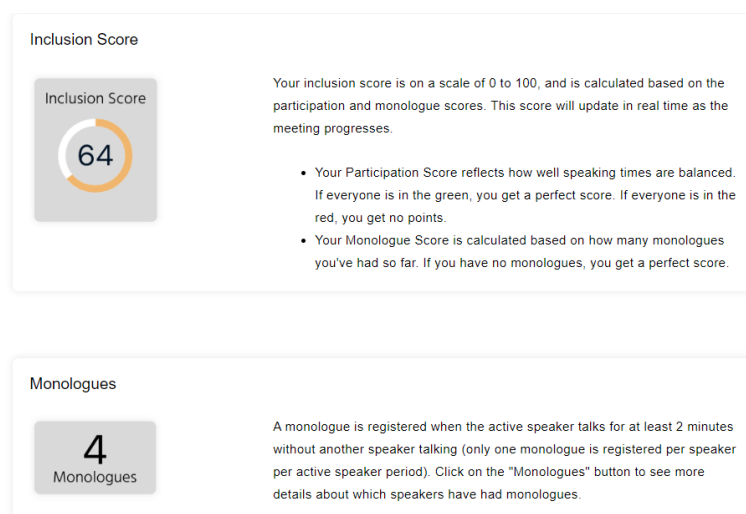
Participation & Speaking Time Tracker

The tracker shows the proportion and minutes that were spoken so that a direct comparison can be made. Individuals can also be hidden in the display (e.g. moderation) in order to only see the distribution of participants.
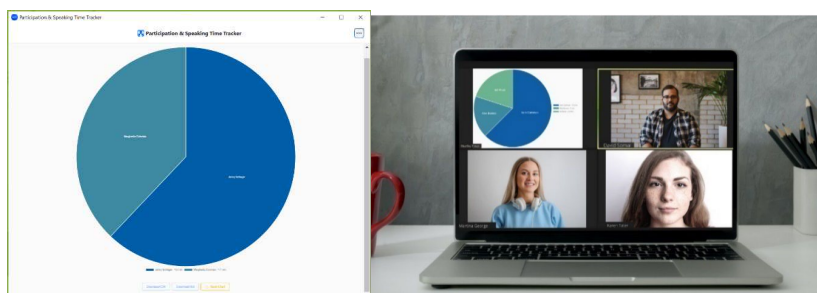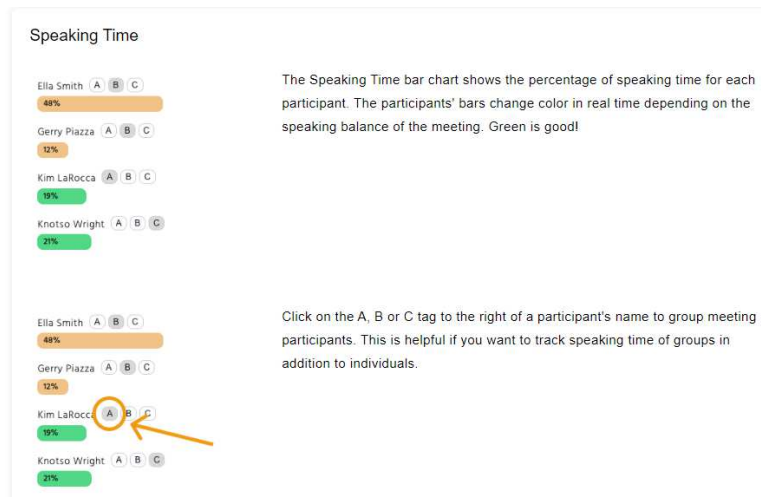

Source: https://marketplace.zoom.us/apps/eiC_JnA4Qee2b42zT6sTKw

Equal Time

This app tracks more aspects such as the number of monologues performed (continuous speaking time of more than two minutes) or the speaking time of defined groups (e.g. moderator, manager, employee or by company affiliation, etc.).

Inclusion Score

Inclusion Score

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Your inclusion score is on a scale of 0 to 100, and is calculated based on the participation and monologue scores. This score will update in real time as the meeting progresses.

- Your Participation Score reflects how well speaking times are balanced. If everyone is in the green, you get a perfect score. If everyone is in the red, you get no points.
- Your Monologue Score is calculated based on how many monologues you've had so far. If you have no monologues, you get a perfect score.

Monologues

4
Monologues

A monologue is registered when the active speaker talks for at least 2 minutes without another speaker talking (only one monologue is registered per speaker per active speaker period). Click on the "Monologues" button to see more details about which speakers have had monologues.

Speaking Time

Ella Smith [A] [B] [C]
48%

Gerry Piazza [A] [B] [C]
12%

Kim LaRocca [A] [B] [C]
19%

Knotso Wright [A] [B] [C]
21%

The Speaking Time bar chart shows the percentage of speaking time for each participant. The participants' bars change color in real time depending on the speaking balance of the meeting. Green is good!

Ella Smith [A] [B] [C]
48%

Gerry Piazza [A] [B] [C]
12%

Kim LaRocca [A] [B] [C]
19%

Knotso Wright [A] [B] [C]
21%

Click on the A, B or C tag to the right of a participant's name to group meeting participants. This is helpful if you want to track speaking time of groups in addition to individuals.

Source: https://marketplace.zoom.us/apps/c0dH9vZeSiyqP7bVB-o-0Q

	Checklist Fairness
	In advance: Are rules on inclusion established at the start of the meeting/event? Does the design give everyone the opportunity to have their say? As facilitators, how do we ensure that all participants feel welcome and comfortable? As a facilitator, how do I create the atmosphere in which people are telling me this if this is not the case?
	In the meeting: Get to know the group: What are the needs?
	Afterwards: Has everyone been given a chance to speak or contribute?
	Am I (as facilitator) sensitised enough to the topic and do I have a sufficient understanding of boundaries, grey areas and dynamics?

📏 KEY FACTOR: DESIGN AND STRUCTURE

Create the basis for every virtual meeting/workshop: clarify the objective, agenda, methods, roles, rhythm; select the appropriate process and methods for dealing with the topics; ensure a clear process and common thread for participants

Design and structure form the basis for the success of the virtual event.

In the virtual environment of online meetings, clear structures are even more crucial, as visual and spatial perception is limited. Moderators have the opportunity to promote smooth interaction and ensure that the objectives of the meeting are achieved by carefully planning and implementing the meeting structure.

The structure acts as a guide that leads participants through the meeting. A clear structure creates transparency about how the meeting will be organised. Participants know what to expect and can prepare themselves accordingly. A well-structured meeting agenda can help to ensure that all opinions are heard. It enables the conscious inclusion of different perspectives and contributes to an inclusive discussion culture. Without a meeting structure, there is a risk that certain people will not be heard and their contributions will be lost.

💡 Tips for moderation methods

The key points are to clarify the objective and desired outcome of the virtual event and, based on this, to develop the process design and agenda with moderation methods that are appropriate to the topic and objective. Furthermore, the roles and responsibilities of the co-organisers should be defined and clarified (what is expected of me, why am I here, how can I participate).

This factor is also relevant during the meeting - the moderator controls the process by balancing the plan with current requirements (important current topics, group process) and by specifically organising the rhythm (energiser, need for breaks, etc.).

Before the online event - preparation and planning

Good preparation is essential for a successful meeting. The following questions should be clarified in advance during planning and organisation - they can be used as guidelines in the sense of a quality check:

- **What is the aim of the meeting or the desired outcome?** Meeting success depends on having a clear objective: what topics are to be dealt with and what kind of result is to be achieved: is it about sharing information, obtaining feedback or working on topics together?
  How should the working on topics, the involvement of participants and the preservation of results be organised? The "script" for the event is designed on the basis of these preliminary considerations.

- Requests for the agenda can also be obtained in advance from the participants. Why not do this in a continuous online document (e.g. Google Docs) instead of by email? With an inviting question, e.g. What is important to you for the meeting, which topics should be included?

- **Who is taking part?** The relevant group of people for the meeting should be defined in advance, including the expectations of the people invited.
  - Pay attention to whether the participants need information in advance, e.g. documents for preparation, or whether the moderator needs information from the participants, e.g. a link to a short preliminary survey (no more than three short, clear questions) can be sent in order to raise expectations and previous experience and to enable an initial introduction to the topic with reflection questions.

- **What is on the Agenda?** The agenda is prepared on the basis of the objectives of the meeting/workshop. It is a short form of the detailed script. In advance, the person sending the invitation sends an attractively designed invitation with an agenda and link.
  - Technical information can be sent with the agenda, e.g. the request to participate from a laptop/PC and not from a mobile phone/tablet, as small groups work interactively on a whiteboard and this is otherwise only possible to a limited extent.

- **Who moderates?** The roles are well defined: for example, who moderates, who co-moderates, who gives what input, who documents.
  - The moderators coordinate their tasks in advance in order to interact smoothly: Who moderates which parts of the agenda, who monitors the chat, who shares information on the screen, etc.?

- **Who provides the impetus?** Preparatory discussions with initiators are planned and organised before the meeting. The following questions need to be clarified here:
  - How long should the input last? It is helpful to specify a maximum time here, about 10 minutes, then an interactive element should follow
  - What visual element should accompany the input? - Presentation, max. number of slides
  - What interactive element is there after the input or how are questions and comments from participants collected? The briefing for presenters is essential, it can also be done (additionally) via a short video.

The script

The creation of a detailed schedule or "script" is central to the preparation. An outline of this is shared with the participants as an agenda before the meeting.

The following elements are relevant when thinking through the schedule:

- Aim of the meeting/workshop and the topics to be discussed - ideally not too many
- Clarity on what kind of outcome is aimed for per topic: Is it just to share information? If so, it makes sense to allow time for questions. Should feedback be collected on a topic? Then a sequence for discussion is necessary. Should a solution to a topic be worked out together? Then a more detailed sequence should be planned.
- Select the appropriate method depending on the objective and issue - we have compiled methods for each phase of a meeting/workshop in document 5.3.
- Participant involvement (interactive elements)Designing the rhythm - with variety, energising elements (energisers) and sufficient breaks
- Securing results: interactively in real time on a shared document or digital whiteboard accessible to all
- Technology test: Before the meeting, check all the necessary equipment such as microphones, cameras and speakers and other technical aspects such as internet connection, audio and video quality and the functionality of the platform on which the meeting is being held.

The workshop canoe

The workshop canoe - developed by Dick Axelrod[2] - can be used as a basic model for creating the script. It is a simple structure for organising meetings and workshops. By following the structure, meetings can be organised in a dynamic and energetic way.

The workshop canoe consists of six different phases:
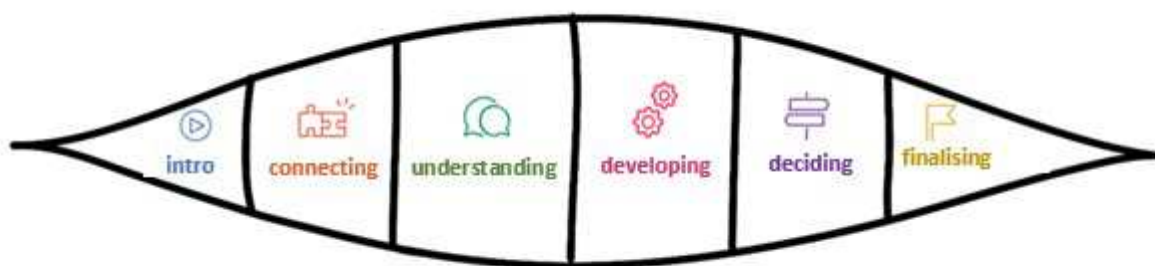
Source: after Dick Axelrod, own editing

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[2] Axelrod, Dick: Let's Stop Meeting Like This: Tools to Save Time and Get More Done, 2014

1. **Introduction**: At the beginning of a meeting, all participants are actively welcomed and briefly informed about the agenda topics and the programme. This phase is even more important in virtual meetings, as the participants can "do less of it themselves" - the moderator has the important function of host and paving the way for what follows.

2. **Coupling:** This is followed by coupling with each other in order to build trust and with the topic of the meeting in order to set the mood for the subsequent work. In a "check-in" that fulfils these objectives, all participants should be given the opportunity to speak briefly in order to arrive at the meeting/workshop in an active role, e.g. via a plenary session, a brief exchange in small groups or via a virtual live query.

3. **Understanding:** In this phase, an overview of the topics to be worked on is first provided and content and information is presented - ideally in a compact and easy-to-understand manner. In addition, topics are discussed here - what is our focus today, what exactly is the problem we want to work on, what facts do we have?

4. **Develop:** This is followed by the collaborative development of opinions, ideas or solutions to the given content and issues, e.g. in small groups. Here it is particularly important to involve everyone actively in order to ensure a common basis for the topic being discussed. A virtual whiteboard or collaboration in a shared document can visualise the points discussed and promote exchange.

5. **Decide:** The aim here is to make decisions on what has been worked out. This can also be done virtually in a participatory manner, for example using methods such as the consensus principle (see Methods set).

6. **Conclude:** Finally, it is important to conclude the discussion well, both in terms of content and at the interpersonal level. This includes defining or concretising the next steps and responsibilities in order to successfully implement what has been agreed. At the same time, there should be room for an "emotional" conclusion in which each person can briefly summarise their impressions and feedback on the success of the meeting/workshop is obtained. This can be done with a final round, virtual live survey or as a minimal option with comments in the chat.

Tools and methods for each of these phases are presented and described in detail in the method set for virtual moderation.

In the meeting - moderating the meeting

Following the script that was created with the workshop canoe, the focus is now on moderating the meeting. Important success factors during the meeting are:

Opening - welcome and orientation

- The moderator opens the meeting: welcoming all participants and ensuring that everyone has introduced themselves
- A brief technical check can be linked to the welcome - e.g. a request to switch on the camera and sound to ensure that the participants can be seen and heard.
- This is followed by a presentation of the objectives and agenda.

Rules of the game and netiquette

- Orientation and behavioural awareness are created if some rules of virtual interaction are clarified at the beginning, for example with a handful of rules of the game, adapted to the respective group and objectives of the meeting. This makes it easier to refer to them later.
- Rules of the game can include the following topics, for example:
  - Switch on the camera, be visible. If switching on the camera is not possible/desired for whatever reason, the moderator should ensure that equal participation is still guaranteed (participation options such as raising a hand and chatting can be mentioned again here).
  - Actively confirm muting - avoid noise, actively speak up and participate.
  - Start and end on time.
  - Handling interim questions during inputs - e.g. asking and answering questions at the end of a presentation, or writing questions in the chat.
  - Mutual commitment to confidentiality of the content discussed - the "Las Vegas principle", what is discussed in the call also remains within this framework.
  - Mindful communication - listen to each other and allow each other to speak, give a (mutually agreed) signal in the case of long requests to speak.

Clear communication

- Clear questions and invitations addressed to specific people by name promote clarity in virtual meetings ("Thomas, would you like to add something?", "Susanne, you were just about to say something?") - vague and ambiguous questions and invitations ("Does anyone have any questions?", "Who else would like to add something?") tend to go nowhere.
- The participation of everyone should be the primary goal - communication should be understandable for all participants, everyone should have the opportunity to express themselves and be heard.
- The visibility of key information such as the agenda, content and notes during the meeting also provides support.
- Technical information can be provided minimally as required if an important function is not familiar.

Integration through interactive elements and other supporting communication formats

- The moderator's task is to ensure a constructive, pleasant discussion atmosphere with suitable methods and interventions. This is best guaranteed if the formats alternate and involve the participants - plenary sequences with guided discussion rounds or surveys, small groups in breakout sessions with key questions and a task to elaborate.
- The moderator uses a clear structure to ensure that everyone is heard and that there are no overly dominant speakers in order to avoid inequalities, include the "quieter" participants, allow more voices to be heard and ensure that valuable contributions are not overlooked.

Control time management and rhythm

- recommendation is to start the meeting on time and not wait for participants who are running late. The moderator should stick to the schedule and share it transparently with the participants.
- The moderator ensures that the meeting stays on track. If it comes to a standstill or the discussion gets too carried away, they intervene and bring the discussion back on track.
- Sufficient breaks and adherence to them are important for participants' concentration, especially in virtual meetings - screen-based work requires more concentration.

Flexibility

- If challenges arise (disruptions, unequal technical requirements of the participants, etc.), the moderator should act with flexibility and adaptability, e.g. a break can be used to solve a technical problem. Information can be shared in the chat if the sharing of documents or whiteboards is not working at the time.

Use multiple channels

- The use of multiple channels - audio, visual, chat, etc. - supports the smooth exchange of information and helps with limitations in one of the channels. Visual aids such as presentation slides or a whiteboard visualise thoughts, ideas and results.

Conclusion and outlook

- At the end of the meeting, the moderator summarises the most important points, provides an overview of what was discussed and what happens next. Agreements should be communicated in such a way that those responsible know what is expected of them and can prepare themselves.
- Obtaining feedback at the end helps to identify improvements for future meetings and workshops and communicates to participants that their satisfaction is important.
- The meeting should end on time, the facilitator thanks all participants for attending and makes sure everyone knows where to go if they have any questions.

After the meeting - documentation and next steps

The topics discussed should not be forgotten: minutes include the points discussed, results and agreements and can take various forms: Recording of the meeting; notes on the meeting, possibly with a To Do list; presentation of results in a digital location (MS Teams, whiteboard). It is important to send the link/document to all participants promptly after the meeting

Hybrid settings

If a meeting or workshop takes place in a hybrid form (some participants are present together on site, others are connected virtually), this requires special attention: the people connected virtually are usually at a disadvantage in terms of key factors compared to those sitting together in a room: Hearing and seeing all participants, being able to take part in the dialogue.

The following framework conditions should be ensured for all participants:

- If some of the participants are together in a physical location, it is important to be able to match voices to faces. Possible starting points:
    - Everyone has their own end device with a camera function in front of them and is visible in close-up. Everyone's microphones are muted and the audio is played via a shared audio device (e.g. Jabra).
    - A moving camera and microphone (e.g. "Meeting Owl") are used to record the speakers.
    - The moderator or speaker in particular should be visible.
- Those who are together on site tend to feel more connected and have more opportunity for dialogue in between. The guided exchange should therefore be organised in such a way that everyone can participate and there is as much mixing as possible among the participants, e.g. virtual break-out sessions mixed with virtual and face-to-face participants in different physical rooms.
- The joint documentation should take place in such a way that everyone can see it equally well - e.g. with a virtual whiteboard that is also visible and editable for everyone in the (face-to-face) room

Notes on technical tools

The general rule is: low level - only as much as necessary, as little as possible. The more tools are used, the more complex and distracting virtual collaboration becomes. Here is a selection of apps:

- Planning of meetings and workshops[3]: App for workshop planning and design creation; Canva[4]: Creation of visual presentation, infographics, etc.

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[3] https://www.sessionlab.com/de/ Access possible free of charge
[4] https://www.canva.com/de_de/ Access possible free of charge

- Video conferencing tools: various providers, e.g. Zoom, Microsoft Teams, etc., with ongoing development of functions. In some apps (e.g. Gathertown[5]) participants can enter digital rooms as avatars.
- Virtual whiteboards with many interactive functions (e.g. Miro[6]) or simpler apps (wie z.B. Padlet[7]) for sharing notes, images and files
    - Shared online documents for collaborative editing are an alternative to a digital whiteboard, the following options: Shared list (e.g. Microsoft To Do)
    - MS Teams channel: joint editing in a "shared document"
    - Google Docs: shared documents
- Survey and feedback tools (audience interaction tools) such as (e.g. Mentimeter, Slido) make it possible to obtain participant feedback and conduct polls - live or asynchronously in the run-up to the meeting. Kahoot![8] is an interactive quiz tool.
        Many project management tools are available for virtual collaboration and task planning (e.g. Trello: virtual boards, task and time management; setting up an MS Teams channel; Slack: tool for messaging and collaboration9

Checklist design and structure

Has an agenda with a link and (technical) notes been sent out?

Has a detailed script been drawn up?

Is it clear to everyone what the aim of the meeting is and why they are attending?

Have the roles been clarified and well prepared? - Moderation, inputs, screen sharing, etc.?

Are all the tools used tailored to the group and compatible with the virtual setup? For example, is it clear who creates breakouts, can everyone access the whiteboard ...

Have the co-moderator and facilitator coordinated/prepared?

Is there sufficient knowledge/clarity about the diversity dimensions of the participants that could become relevant in the setting?

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[5] https://www.gather.town/ Access possible free of charge

[6] https://miro.com/de/ Access possible free of charge

[7] https://de.padlet.com/ Access possible free of charge

[8] https://kahoot.it/

👥 KEY FACTOR: CREATING INVOLVEMENT, PARTICIPATION

Create involvement, enable active participation of all; structure and actively organise the exchange; ensure fair speaking time; improve results through more diverse perspectives - choose the right form of processing for the respective topic with methodological diversity in order to achieve the best possible results

In online meetings, the opportunities for non-verbal communication are limited, attention levels drop and it is often more difficult to absorb content and stay focused on a presentation or discussion. Interruptions from outside the meeting are more distracting and working on other things at the same time can be the result. Virtual participation also has a higher entrance barrier (switching on the camera or sound, actively interrupting, etc.).

Frontal presentations should be avoided here, as attention is easily lost and participants fall into a passive role. Organising active participation is a decisive success criterion for turning passive listeners into active participants. It is therefore important to promote active participation through targeted interaction methods, clear moderation and the inclusion of all participants. This enables every voice to be heard equally (fair speaking time), different points of view and ideas to be introduced and a greater diversity of solutions and creative approaches to emerge, as well as promoting a meeting culture of equality and appreciation.

The aim of moderation is therefore to use moderation methods to create a virtual space in which dialogue is promoted and everyone is encouraged to speak. A key success factor here is a process design in which the active participation of all participants is planned and facilitated - with a targeted selection of suitable forms of processing for the respective topic (small groups, rounds with everyone speaking). The moderator also ensures that the participants are involved during the course of the meeting by ensuring fair speaking time and a balanced distribution of words, as well as encouraging informal discussions at the start and during breaks.

💡 Notes on moderation methods

In order to promote dialogue and encourage people to contribute, it is useful to think through the meeting in terms of energy (for more details, see the key factor "Maintaining energy").

Introduction and check-in

Right at the beginning, all participants should have their say briefly to make them active participants. Depending on the context, a method can be deliberately chosen (e.g. Do all participants already know each other? Do we need a round of introductions?)

- Explain the virtual rules of the game: actively use the mute function, invite participants to activate the camera
- At the beginning, ask the question "What can be my best possible contribution to this meeting/workshop?"
- Welcome round with introductions: one after the other, the participants state their own name for the others, including pronouns if they wish.
- Query as a group or with a tool such as Mentimeter. For example, the mood or a personal reference to the topic of the meeting/workshop can be asked.
  Photo: everyone is asked to share a spontaneous picture along the lines of "What do you see from your position" - as an encouragement to share something personal and for a sense of connection

During the workshop/meeting

- Interaction should take place every ten minutes during a virtual impulse: e.g. ask for non-verbal reactions via virtual hand signals, emojis; write an answer to a question in the chat; short round with statements; send small groups into breakout rooms with a key question and work assignment and then have the results shared in a compact way in the plenary session.
- Encourage participation, but do not force it, e.g. let small groups choose who presents in the plenary session
- Regularly check the chat, consider questions and comments and integrate them into the meeting. Co-moderation helps to record and consider incoming messages.
- Use methods for participatory decision-making (consensus decisions, anonymous voting...), e.g. organise the order of the agenda together in the meeting
- Have courage as a moderator: interrupt frequent speakers, address people directly, endure silence if there is no answer after a question - the pause allows you to think about the question again, possibly voices that have needed the time will then come forward.
- Introduce rotating moderation roles at regular meetings (speaker, recorder, etc.). Agree in the meeting beforehand who will take on which role next time. Advantages: many people participate, take responsibility for a successful meeting and learn about the challenges of the moderation role.

	Notes for technical tools

- Invite participants to switch on the camera (point out in advance in the meeting invitation that this can lead to a better culture of dialogue, especially in small groups).
- Active use of functions such as break-out rooms, show of hands, chat, ...
- Use online whiteboards for visualisation, group work and documentation (e.g. Miro)
- For large groups in MS Teams, refer to the gallery view so that more people can be visible.
- Break-out groups: divide the participants into groups or set up freely selectable rooms (possible with Zoom, or set up channels in Teams - so that moving between the groups is possible)
- Use speaking time apps that measure the speaking time (e.g. Participation & Time Tracker in Zoom)
- Conduct surveys, e.g. directly in the video conferencing tool (e.g. Zoom, MS Teams, Google, etc.) or use external tools (Menti, Slido, Kahoot, etc.).

Checklist Creating participation

	How well do the participants know each other, do they need to get to know each other?
	Does everyone get a chance to speak?
	Are several communication channels offered? e.g. survey, chat
	Are there enough interactive sequences where everyone can contribute something (e.g. small groups)?
	Do I make enough pauses to give participants the opportunity and time to think about an answer?

👁 KEY FACTOR: VISUALISATION

Create comprehensibility and clarity to make it easier to follow the content; encourage creativity, commitment and interaction; promote interaction through joint documentation, recording and visualisation of results

Visualisation makes it easier to grasp complex information. Different types of learners can benefit from visual representations, which contributes to more inclusive knowledge transfer. Visual elements can help to overcome language barriers and make complex concepts easier to understand. Online meetings offer many opportunities to use visual elements.

In virtual meetings, good visualisation of the key content is even more important than in face-to-face meetings so that all participants can follow and understand what is being said and agreed.

The aim of visualisation is to make the content visible and record the results: Results achieved become clearer and more engaging when they are visualised. The documentation of the results should be done in a suitable way so that the results are easily and clearly accessible afterwards.

Even more commitment is created when content is interactively documented in writing during the meeting - in a joint discussion and documentation: this promotes interaction - the participants take on an active role.

A design that is visually adapted to the target group helps to ensure that many participants feel invited to contribute and that different perspectives are equally valued. People who prefer to write rather than speak can participate on an equal level, as the barrier to writing something may be lower than contributing verbally.

💡 Notes on moderation methods

Design written material – with the goal in mind

- Many moderators have their own style of designing and using documents. To make content visible, moderation slides are very helpful - ideally a few slides with little text. They should not dominate the virtual meeting and should be alternated with formats for shared visualisation (whiteboards).
- Whichever format is chosen, it is important that all participants can follow along during the meeting and that the results are available as documentation afterwards.

Promote visualisation in all steps

- Everything important should be made visible: Content, comments, ideas, thoughts, results.

- In written documents, pay attention to clarity, readability, conciseness and brevity - and demand the same from the other presenters.

- Before the virtual meeting/workshop, ask participants in the invitation to take part from a PC/laptop, as sharing and viewing content and participating in interactive tools such as whiteboards is restricted when using phones and tablets.
- As a moderator, always refer to the visualisation when speaking, make the connection between the verbal and the visualisation and describe the visualised content well - especially if participants are using a mobile phone, for example, and cannot see the visualisation well.
- To ensure that results can be documented together, set rules in advance, e.g. regarding the confidentiality of content.
  If participants contribute presentations, the innovative Pecha Kucha[9] format can be agreed, which regulates the duration and scope of the presentations and relies heavily on images instead of text.
- Deliberately stop sharing documents after the presentation. This makes it easier to moderate the discussion and the participants can see each other better again.
- After an impulse, allow time for an exchange with visualisation of thoughts, ideas and results:
  - Either invite participants to visualise their thoughts and questions on a whiteboard directly in the plenary session.
  - A more differentiated visualisation is created when the participants exchange their thoughts and opinions in small virtual groups (breakout groups) and record them on a whiteboard. The results from the break-outs can then be shared in a compact way in the plenary session.
- Create a video recording of the meeting (with the consent of all participants) and send out a link with the minutes: the meeting can be watched again afterwards.

Notes for technical tools

- Options for one-way visualisation: share screen, play and share videos
- Options for interactive visualisation: shared document (Google Doc, document in MS Teams channel for joint editing, digital whiteboard, etc.)
- Make presentation accessible if required, e.g. with read-aloud function.
- Enable accessibility, instructions for Zoom: https://explore.zoom.us/de/accessibility/faq/#faq10,
- Notes for MS Teams: https://support.microsoft.com/de-de/office/barrierefreiheitstools-f%C3%BCr-microsoft-teams-2d4009e7-1300-4766-87e8-7a217496c3d5
- Integrate moderator into the screen for permanent visibility: https://support.microsoft.com/de-de/office/begeistern-sie-ihr-publikum-mit-modi-f%C3%BCr-pr%C3%A4sentieren-a3599bcb-bb35-4e9c-8dbb-72775eb91e04

Checklist Visualisation

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[9] More detailed explanation in 5.3 Method set

	Do all participants have the opportunity to follow the meeting visually?
	Is there a balance between slides and interactive visualisation formats?
	Do the participants have sufficient time and opportunities to exchange and visualise thoughts, ideas and results after each impulse?
	Can the results be viewed by everyone after the meeting?

⌁ KEY FACTOR: MAINTAINING ENERGY

Actively shape the rhythm of the meeting - offer methodological variety and diversity - cover different needs; actively shape the rhythm, offer activations; increase activations, attention and commitment and promote a constructive dialogue climate

In virtual meetings, it is harder to maintain energy "in the room". Participants can leave more readily and easily and may find it difficult to return to the setting with their attention - due to distractions, but also after a planned break. Due to the restriction of perception channels in virtual meetings, the moderator needs to pay even more attention in order not to "lose" the group and the individuals. Shaping the rhythm of a meeting and maintaining energy and attention is of great importance in virtual meetings. The aim is therefore to encourage active and emotional participation in virtual and hybrid settings.

The moderator is responsible for keeping an eye on the rhythm of the virtual meeting/workshop and actively controlling it. The script itself should already promote methodological diversity and, depending on the objective of the respective programme item, enable either focused discussion, interactive processing or informal loosening up.

During the meeting, the moderator pays attention to the group dynamics and energy level of the group, uses elements that promote concentration and focus or energy and activation, and provides sufficient breaks. Facilitators have the important role of paying close attention to the energy levels of the participants. Breaks, for example, offer participants space for reflection and processing. This is particularly important when discussing complex or controversial topics in order to process them. Breaks allow everyone to compose and organise themselves before expressing their thoughts. This can increase equality of opportunity, as introverted or thoughtful participants are more likely to have the opportunity to contribute

💡 Notes for moderation methods

Active energy management

- Design the event with this in mind: sufficient variety in the methodology, short presentations, sufficient interaction and dialogue in various formats (plenary, small groups).
- As a moderator, understand and position yourself as an energiser from the outset: With the proactive attitude that virtual moderation largely involves giving and holding energy in the shared virtual space: for example, with a particularly attentive greeting when the participants enter with a direct address to all participants to break the ice.

Creating rhythm with structure and time management

- Well-organised time generates energy. Virtual meetings and workshops should be kept as short as possible. Regular project or team meetings should not last longer than 30 minutes - for focus and efficiency. Start and end virtual events on time - stick to the times and be respectful of other people's time resources: Start at the agreed time, even if not everyone is there. End as agreed, adjust the duration of the impulses and discussion accordingly.
- Maintain the focus of the meeting, do not wander off: organise separate meetings for new topics/side issues. If a topic requires more space, either arrange a new meeting or agree on the priority together in the group.

Organise variety and time-outs

- Incorporate short energisers into the process - with the courage to change patterns, e.g. with movement, creativity
- Use gamification elements for activation: e.g. collect points for active contributions
- Something different: organising virtual small groups, e.g. as a walk (talking on the phone in pairs)
- Active time management:
    - Communicate the break time in advance
    - Have the flexibility to take breaks where they are needed
    - Request information about energy levels from the participants - ask "is another stimulus possible or do I need a break" and act according to the situation
    - Display timer during breaks - how long the break will last
    - Play music during the breaks to energise

Notes on technical tools

- Ask for reactions to receive feedback on energy: Voting in chat, with emojis, etc.
- Use feedback cards for virtual settings
- Display online timer for group work or during breaks - how much time is left, use timer function directly in whiteboards (e.g. Miro) or share another app on the screen (e.g. http://design.giannipolito.fr/timer/)
- Use online playlists (e.g. YouTube, Spotify, e.g. Chillout, Lounge Music)

Checklist Maintaining Energy	
	Are participants invited to indicate their energy level?
	Can needs be expressed and are they responded to?
	Retrospective: Were the topics on the agenda dealt with? If not - was there a good reason for this?
	Could the time be kept? If no - was there a good reason for this?

📊 KEY FACTOR: CONTINUOUS IMPROVEMENT

Further developing virtual communication by trying out new tools and methods; improving quality through feedback: taking a shared view of virtual collaboration, identifying opportunities for improvement; introducing new ideas, creativity and variety

Virtual communication is challenging because reactions are less visible than in face-to-face formats and immediate feedback from participants may be lacking. In addition, virtual technology and the methodology for organising virtual collaboration is developing rapidly - it is crucial to use the constantly evolving technical tools effectively and it is worth trying out new things (such as a tool that maps participants' speaking time).

A regular look at possible improvements and facilitations in virtual meetings or workshops is therefore necessary. The aim is to ensure learning and continuous improvement and further development of the virtual experience, virtual communication and collaboration.

Continuous improvement is an important basis for making online meetings inclusive. Through regular reflection, barriers can be identified, challenges in dealing with diversity recognised and new solutions developed. In this way, a more inclusive environment can be created in which diversity is valued and utilised. The facilitator's role here is to create a space for open discussion that allows participants to make suggestions for further development.

A proactive evaluation together with the participants helps the facilitator to arrive at a solid assessment of the effectiveness of the meeting or workshop. A critical look at the meetings encourages continuous learning from experience and adapting meetings based on needs and feedback.

Virtual collaboration is a shared learning field for a team/group, so it is important to take a step back at regular intervals to look at the "how" of the collaboration, evaluate it and jointly identify opportunities for improvement for further development, e.g. with a retrospective.

💡 Notes on moderation methods

Feedback after the meeting / workshop

- It should be standard practice to obtain feedback from participants at the end, e.g:
  - ROTI (Return on Time Invested): A question on a scale of 1-10 about how valuable the time invested was
  - A word at the end in the session
  - Obtain statements with a tool such as Mentimeter/Slido
- Feedback should also be a fixed point within the moderation team

Feedback in a continuous collaboration

- A reflection meeting can be held at longer intervals (e.g. every three to six months) to take a look at the "how" of virtual collaboration, e.g. in the form of a retrospective
- In the compact retrospective using the "Starfish method", each member of the group answers these five questions:
    o What do we want to keep?
    o What do we want to do more of?
    o What do we want to do less of?
    o What do we no longer want to do?
    o What new things do we want to try out?

Further starting points for continous learning

- Introduce rotating moderation roles at regular meetings - different approaches and methodologies become visible and can be incorporated into the common repertoire.
- Introduce roles in the team that drive improvement: for example, a role that provides impetus for new technical methods and introduces new tools that are available.

Notes for technical tools

- Feedback directly in the video conferencing tool through non-verbal reactions in the chat or with emojis, etc.
- Virtual place where everything relevant is collected - for inspiration and feedback
- Utilise online retrospective tools (available in Miro, for example)
- Online survey tools: Easy Feedback, Mentimeter etc.

Checklist Continuous Improvement

How is feedback obtained from participants/co-facilitators/clients?
How is virtual collaboration jointly evaluated and improved?
Is there anything new that could be tried out and implemented straight away?
Are all participants up to date with the latest tools and features?
Do we rotate the creative roles in the team?

LITERATURE

Guides and literature on meeting design:

- Axelrod, Dick: Let's Stop Meeting Like This: Tools to Save Time and Get More Done, 2014
- Reidl Sybille, Beranek Sarah, Greithanner Julia, Sauer Angelika, Schiffbänker Helene: Projekt Faircom, Ergebnisbericht zu Nutzer*innenerhebungen, 2022
- Chugh Dolly, How to have more inclusive meetings over Zoom, 2020: https://ideas.ted.com/how-to-have-inclusive-meetings-over-zoom/
- Colorado State University: Inclusive Online Meeting Practices:
- Taepke Katrin: So organisierst du Online-Hybridveranstaltungen © MICEstens digital, 2020 https://www.micestens-digital.de/wp-content/uploads/2020/10/ebook-Online-und-Hybrid-Veranstaltungen.pdf
- Tools for remote workers: A superlist of Tools & Apps to help you work better remotely,

Guides and literature on inclusive language / visual language:

- https://www.nonbinary.ch/pronomen-anwendung/
- https://nibi.space/geschlechtsneutrale_artikel
- https://www.genderleicht.de
- http://geschicktgendern.de
- https://queerleben.de/glossar
- Geschlechtersensible Sprache – Dialog auf Augenhöhe, Gleichbehandlungsanwaltschaft Wien: https://www.gleichbehandlungsanwaltschaft.gv.at/dam/jcr:8029ba34-d889-4e64-8b15-ab9025c96126/210601_Leitfaden_geschl-Sprache_A5_BF.pdf
- Leitfaden für geschlechtergerechtes Formulieren und diskriminierungsfreie Bildsprache, Stadt Wien: https://www.wien.gv.at/medien/service/medienarbeit/richtlinien/leitfaden-gender/index.html
- Anzügliche Chatnachrichten, Sexistische Profilbilder und menschenverachtende Kommentare, Neue Herausforderungen in Online-Räumen, Eine Handreichung zur Prävention bei Diskriminierung und Belästigung in Online-Räumen für Studierende und Lehrkräfte, TU Berlin: https://www.static.tu.berlin/fileadmin/www/10002454/KFG/Dokumente/Handreichung_Praevention_Online_Veranstaltungen_21.pdf