USAID COMBATING WILDLIFE CRIME SOUTHERN AFRICA
VIRTUAL EVENT STRATEGY GUIDE

Produced for Chemonics International by CollaborateUp

Introduction

In March of this year, CollaborateUp convened USAID mission staff responsible for environment and biodiversity, along with the Combating Wildlife Crime in Southern Africa (CWCSA) Partners, to reflect on and learn from the project work to date. This reflection was aimed at helping teams collaboratively plan, adapt, and implement the CWCSA Portfolio in alignment with evolving Agency and mission priorities. The Pause & Reflect was originally scheduled to take place in person in Botswana, but the emerging COVID-19 pandemic — and its restriction of international movement and travel — required implementers and stakeholders to convert to a virtual meeting platform.

Based on this experience, and several virtual workshops with USAID CWC implementers since then, CollaborateUp developed this guide to codify best practices and lessons learned for virtual meetings and collaboration. In most cases, the guide sets standards for meetings of three hours or more and typically meetings of more than one session (i.e., three hours each day on three consecutive days). The document is meant to serve as a practical guide to actors in CWC across Southern Africa and beyond on how to continue to work collaboratively, learning from and sharing with one another to move toward portfolio goals, despite continued restricted mobility and limited in-person gatherings.

Preparing and Designing

One of the most important decisions for a virtual meeting is the platform (e.g., Zoom, Microsoft Teams, WebEx, etc). The design of the meeting, the level of interaction and feedback, are all impacted by the choice of platform. There are a multitude of platforms available with both free and paid options. Choosing a platform should be based on the balance of several factors, including:
- Ability for participants to easily join and use the platform
- Functionality of the platform, allowing participants to interact (seamless breakout groups, chat, polling, emoticons, etc.)
- Security of the platform
- Any subsequent documentation of the meeting (recordings or chat downloads)

We recognize the varying security requirements of different government agencies and stakeholders across sectors can greatly impact the selection of a virtual collaboration platform. **Annex 1** of this document contains a chart summarizing CollaborateUp's research and experience on virtual meeting platforms and their respective features.

Pre-Meeting Logistics

Key lessons learned on pre-meeting logistics, from the numerous virtual collaborations CollaborateUp has facilitated in recent months including several for CWCSA, include:

Deliberate planning: Virtual meetings require a different kind of planning from in-person meetings. Research shows that more than 80% of communication occurs nonverbally through body language, facial expressions, and voice tone. Even with video conferencing, facilitators and participants lose much of the fidelity and ability to "read the room." Meeting facilitators must be more deliberate in interactions with participants, calling on people to speak out or answering questions, enforcing norms around taking turns to share perspectives, muting people's microphones if they go on past the allotted time. Things that might seem rude or unnecessary in real life become vital online. To do this right, facilitators should establish ground rules and social norms for the meeting from the very beginning. If video should be on, tell participants in the invitation they must be camera-ready for the meeting. If questions will be asked to the group, facilitators should set the standard by asking people to use the 'raise your hand' function to be called on, or to chat in a quick response, then facilitators will call on those participants to expand. As time allows, co-create these norms with meeting participants on day one, so they feel they are a part of setting meeting standards.

Splitting up facilitation roles: It's often not possible for one person to carry out the role of "facilitator' for a multi-session virtual meeting. While a two-day, 30-participant in-person meeting might well be facilitated by one person, this isn't the case with virtual meetings. CollaborateUp has found that the role of facilitator in virtual meetings needs to be split across two to three individuals to allow for a smooth, cohesive experience. One person may focus on, for example, the facilitation speaking/master-of-ceremonies role, introducing new activities, managing speakers, overseeing the flow of the meeting and timekeeping. Another may monitor the chat box, summarizing and voicing different perspectives or managing discussions and calling on appropriate participants based on their inputs to the chat. The third role is typically a dedicated 'technical' producer, someone to share slides, assign and manage breakout sessions and generally troubleshoot any technical issues for participants and facilitators. Meeting organizers should take these varied roles into account for staffing and budgeting purposes.

> **Case Example:**
> In preparing for the **USAID Southern Africa CWC Pause and Reflect meeting**, CollaborateUp thoroughly vetted multiple platforms to select one that best suited the mission's and participants' needs, selecting one with interactive features for collaborative discussions (breakout rooms, polls) and secure log-in via web browser (no need to download software) ensuring the platform enhanced participant productivity.

Client security protocols: These need to be explained and understood as early in the planning process as possible. Virtual collaboration is often dependent on collaborative documents that require multiple people to have 'edit' permission (breakout slides, concept note development, case study review, etc). It's essential to establish and enforce any security protocols at the onset to prevent future issues or confusion. In addition, the choice of virtual platform may be impacted by security protocols, from firewalls that prevent downloading apps or software to the level of encryption necessary for meeting recordings. Many virtual platforms offer browser-only options without the need to download software, but these versions often have reduced features (e.g., no polling, emoticons) and/or functionality (e.g., greater lag time for video).

Breakout groups and team formation: Breakout groups are an essential component of any meeting larger than 15 participants. While plenary sessions are ideal for sharing data and information, the real collaboration activities, brainstorming, critiquing, developing, happens in breakouts. Virtual platforms require making some *initial* group assignments, and the earlier these decisions are made the easier it becomes to assign groups and ensure smooth logistics during the event. Later, as people get to know each other, you might be able to give some control to participants to let them choose the group configurations. Some virtual platforms also allow you to randomly assign participants to breakout groups at the click of a button. The makeup of breakout sessions will be determined by the meeting objectives and variety of participants. Facilitators and meeting conveners (e.g., the client) must be thoughtful about what will work best.

Rapid feedback loops: Feedback loops work on two levels. The facilitation team and conveners should set up a separate channel of communication on WhatsApp or through a text chain that can be utilized during the workshop. This allows facilitators to discuss any disruptions, changes in schedule or technical issues in real time, but outside of the virtual platform for the meeting. For example, if a speaker has not yet signed on but is on deck to present, these channels can help facilitators adapt the agenda 'behind the scenes' so there is no disruption to the meeting or to participants. The second level at which feedback loops are essential is for participants. CollaborateUp sets up several mechanisms to get rapid feedback from participants during the workshops, including morning polls and closing questions to take the pulse of the group each day. This informs the design and execution of other activities for the following days, allowing facilitators to adapt or delete exercises that might not be working for participants.

Manage the stress: Virtual meetings can place significantly more stress on both facilitators and participants. Unlike an in-person meeting, a lot of things can feel out-of-control -- what if the platform fails, power goes out, the internet connection goes down, etc? In addition, unlike an in-person meeting, people tend to over-schedule themselves, with multiple back-to-back virtual meetings, making it very difficult if sessions run over on time. To manage this stress, we recommend, first acknowledging this stress among both the facilitation team and with the participants. By 'naming and claiming' this stress, we can start to move past it and set a group norm of accepting this level of uncertainty and lack of control and supporting each other through it, rather than blaming someone if they are feeling at fault when the meeting logistics falter. Lastly, we suggest publishing longer meeting times (e.g., if the meeting will run 60 minutes, announce it as a 90 minute meeting) to create a buffer so that people don't over-schedule themselves.

Meeting Execution

Meeting Participants

As touched on above in 'Managing the stress,' it is unfair to assume meeting organizers or facilitators are solely responsible for the success of virtual collaboration. Participants must be held accountable for behaviors that contribute to a compelling meeting. Just as with in-person meetings, social norms should be established upfront and followed throughout the meeting.

Facilitators should introduce norms at the beginning of the workshop or co-create workshop 'agreements' with participants, co-developing the standards that will ensure the meeting is a success. Facilitators can remind participants of these standards each day, or when they are not being followed. Some to consider:

Bring patience and good humor: even several months into COVID-19, some participants may still not feel comfortable using virtual platforms. There will be user-errors and tech-glitches. When participants are patient with themselves and each other, technical issues are much less stressful. Bringing a sense of humor when someone can't turn on their video or has forgotten to mute themselves, reminds people that we are still human and can also bring moments of levity to a meeting.

Know your equipment: Asking for patience with technical issues, doesn't give participants an excuse not to familiarize themselves with the platform and necessary equipment. Facilitators should share the virtual platform in advance, and provide links to any tutorials participants might need. Workshop time spent while participants download the software upgrade or attempt to reconfigure their headphones is time wasted. Facilitators should supply participants with the information they need on the virtual platforms and participants must take responsibility to be up to speed on the software and equipment before the meeting.

Dive in and fully participate: No one likes talking into the ether. Ask participants to keep video on so facilitators can can see a human face and get their reactions. This is helpful for other panelists and speakers as well. Participants should engage as fully as they can by providing feedback and reactions for facilitators and presenters, virtually raising hands to pose a question, providing comments and questions through the chat function, and giving a round of applause after presentations conclude!

Take these meetings seriously: Just as with an in-person meeting, participants should plan and arrive on time, ideally a bit early (to test equipment and orient themselves to the platform). Perhaps most importantly: AVOID MULTITASKING. Replying to emails, checking sports scores, etc., is distracting and disrespectful to colleagues, but also sucks up bandwidth.

Meeting Organizers

Of course, organizers and facilitators must set systems in place and approach virtual meetings with the right mindset to create an enabling environment in line with in-person collaboration. **Figure 1** outlines CollaborateUp's key lessons learned on enabling conditions for virtual collaboration:

Figure 1: Organizer/Facilitator Lessons and Enabling Conditions for Virtual Collaboration

Lesson/Enabling Condition	Recommendations for Organizers
Welcoming environment: this allows participants to feel	Introduce and enable concepts like "participation agreements" and "adaptive thinking" to promote collaboration and innovative thinking:

invited, welcome, and able to be engaged in a virtual context.	● *Participation agreements:* Participants asked what conditions are needed to practice active listening and active presence during a virtual session. A word cloud or other visual can be generated from this chat and shared with participants to help establish the "ground rules" for respectful and meaningful interaction. ● *Adaptive thinking:* CollaborateUp often introduces Ron Heifitz's theory of [Adaptive Thinking vs. Technical Thinking] to bring a systemic view to collaboration in virtual meetings. This helps anchor the thinking of participants, giving them permission to work collaboratively and to build on others ideas. These concepts quickly create the underlying tone needed for a collaborative and interactive experience.
Diversity of perspectives throughout co-creation sessions: this ensures all participant voices are heard during breakouts and that no one dominates the conversation	CollaborateUp addresses this in several ways. We recommend using applications similar to GoogleDocs as a collaborative tool in breakout sessions to allow simultaneous brainstorming and idea capture. It is easy to use and accessible to all. After individual writing/idea generation, participants can then open up microphones to discuss. Liberal use of the chat function in both plenary and breakout sessions also allows all participants to find 'their comfort' zone in how they best want to communicate ideas to the group.
Flexible design: the ability to address emerging conditions throughout the workshop.	CollaborateUp draws on the planning process previously outlined in this document in a way that allows for flexibility to try things and pivot as necessary. Be agile and able to flex and pivot real time if sessions run over, if more time is needed for discussion, or if other unforeseen issues pop up.
Blended methodologies: this helps level the playing field among participants and cater to different learning styles and personalities, with some methods catering to introverts and others catering to extroverts, for example.	Our team uses a mix of tools and methodologies, including CollaborateUp's own tools (as needed) such as the Collaboration Canvas, as well as graphic recording displays, Google Docs (allow multiple people to interact simultaneously while remote), and online platform features like white boards, polling and annotation, to promote a collaborative atmosphere and interactive participation. We also suggest a mix of presenters, a mix of PowerPoint and discussions, plenary and breakouts, to keep participants engaged and address power dynamics. Breakout groups are essential for collaboration, as it is often difficult to collaborate and make decisions in a large plenary. Breaking participants into smaller discussion groups then presenting outcomes to the larger plenary group is both an efficient and effective way to move virtual participants toward a common output.
Breakout groups/group assignments matter: the nature of a virtual platform requires a greater level of deliberate engineering and group assignment to achieve the kind of networking and interactivity that normally occurs in person.	Breakout group assignments assure that the right mix of participant/organization profiles are grouped together. The orchestration of several rounds of breakout group formation and advisor assignments requires prep and team effort but is instrumental in building feelings of trust among participants and exposing them to different organizations/individuals and the concepts and skills sets they are putting forward. This can also help combat power differentials because it allows organizations to work with many others and not get 'stuck' in a group with a domineering attitude or unwillingness to collaborate.
Rapid feedback loops: real-time feedback (or close to it) from both conveners and participants can help workshop facilitators adapt planning to improve workshop outcomes.	We encourage, as is possible, brief feedback sessions with the lead partner after each workshop day, to iterate on the following days' session and reinforce what is going well. In addition, the team will set up several feedback mechanisms for participants to get rapid feedback after each session, including morning polls and closing reflection questions to get the pulse of the group each

	day. Formal participant evaluations must also be sent at the end of the workshop.

Organizers and facilitators should also follow the steps below to keep perspective on the "big picture" goals of virtual collaboration:

Fully participate: CollaborateUp has helped many clients transition previously planned in-person meetings that would bring together executives from across multiple countries. In some cases, the senior leaders who originally planned to participate or make opening remarks at an in-person meeting backed out of the virtual gathering. This is a mistake. It sends a signal that "virtual meetings" don't count. With working virtually persisting into the foreseeable future, leaders must consistently signal that we are all in this together and that virtual meetings allow us to make progress together.

Encourage chit-chat: side conversations in the online chat function bring value. First, they can help replace the visual cues you normally rely on to moderate conversations. As facilitators, we encourage participants to not wait for a pause in conversation but instead to drop thoughts as they occur to them into the chat. Then, facilitators can circle back to these thoughts/comments in the same way one might have reacted to a raised hand or a shift in posture. Second, even if the chit-chat isn't directly related to the current topic, it at least keeps people focused on the platform and not multitasking off the platform doing email, surfing the web, etc.

Remember that action = accountability: Studies show that participant attention begins to drift after 7 minutes during a virtual meeting. Therefore plan interactivity every 7-8 minutes. It doesn't have to be groundbreaking; a small prompt to submit a question in the chat box, or a request to answer a poll can do the trick. Even better, call on people and draw them into conversation. Set the tone from the beginning by opening the meeting with a polling or chat question. Signal to participants from the onset that this will be a highly interactive experience. And don't plan for overly long presentations or PowerPoints, as you're likely to lose your audience. If you do need to share data or have a presentation, stop every few slides for questions or comments.

Less is more: Because virtual meetings test our attention span, plan for shorter sessions. If you would have normally had an hour-long meeting, set it for 45 minutes. If you planned to bring multiple partners together for a 2-day workshop, instead plan two virtual sessions lasting no more than five to six hours broken over the two days.

Breaks help keep participants stay mentally fresh: Just as with planning an in-person meeting, breaks are essential. Even though virtual breaks won't supply caffeine and snacks, it's important for participants to get a mental 'refresh' at least every 90 minutes to two hours. This allows them to get up, get a drink, check on their own family (who is likely also at home). Even if you can't afford a 10 to 15 minute break every two hours (but we highly recommend it), stop for a 2-minute stretch break. It'll keep your participants focused and active in the meeting.

Keep checklists: Have a running checklist of the meeting's outcomes and check them off as you go. For virtual break-out groups, make sure the group knows they will need to present

something back to the plenary group and give them a structure in advance for what kinds of information you want to hear from them.

Accessibility and Accommodation

Meeting facilitators must ensure that virtual meetings create an enabling environment for participants of all abilities to virtually engage in collaboration. This should begin in the planning phases and entails thinking creatively about the best ways to include accessibility features and accommodations for all participants throughout each workshop, including, but not limited to:
- Pre-workshop sharing of electronic copies of workshop materials and resources such as slide decks, agendas, and participant rosters
- Closed captioning on the selected virtual platform for participants for whom English isn't their first language
- "Pinning" video of sign language translators
- Exploring simultaneous translation as needed
- In multi-day meetings, capturing and posting all questions and answers from the chat box each day

Planning must ensure that people of all abilities can meet and collaborate with one another by taking into consideration the wide range of hearing, vision, and cognitive abilities, as well as the balance between accommodation offerings, ease of use, security, and co-creation functionality. Based on CollaborateUp's experience and research, Zoom seems to be the platform best suited to virtual meetings and collaboration for participants of all abilities. All Zoom products are 508 compliant. Zoom also offers closed captioning by a trusted third party that can be streamed into the Zoom interface and simultaneous interpretation audio channels.

Annex 1: Virtual Platform Comparison Tool

Updated as of August 10, 2020. NOTE: Virtual platforms are continually updating applications so please confirm online the prices and functions are the latest

Evaluation Factor	Adobe Connect	WebEx	Zoom Business	BlueJeans	Microsoft Teams	Google Hangouts
Plans & Pricing	Meetings account: $50/month or $540/year (meetings up to 25 participants) Webinars account: $130/month or $1,250/year (webinars up to 100 participants) Can do a 90-day free trial and host webinars up to 25 participants.	Meetings Starter account: $14.95/month or $13.50/month on an annual plan (up to 50 participants) Meetings Starter account: $19.95/month or $17.95/month on an annual plan (up to 100 participants). - can have alternate hosts, get meeting analytics	$20/month and up to 300 participants	Standard: $9.99/month ($119.88/year) Up to 50 participants. Pro: $13.99/month ($167.88/year) Up to 75 participants.	4 pricing packages, up to 250 participants.	Free, up to 50 participants (if you already have G-Suite).
Free Option	No	Yes	Yes	No	No	Yes
Free Option Participant Capacity	N/A	3	100	N/A	N/A	25
Free Option Meeting Length Time Limit	N/A	24 hours	40 minutes (in meetings with more than 2 attendees)	N/A	N/A	24 hours
Maximum Participants	Up to 100	Up to 1,000	Up to 500	Up to 75	Up to 250	Up to 50
Join from Web Browser vs. App Only	Can access via web browser	Can access via web browser	Can access via web browser	Can access via web browser	Can access via web browser	Can access via web browser
Recording Options	Save to cloud	Can record and save as file or to the cloud	Cloud or desktop but cloud has fairly small limits for storage	Save to cloud to be downloaded later	Save to cloud	No
Sharing Options	File sharing and whiteboard option	Desktop, application, file, and whiteboard sharing options	Desktop, application, file, and whiteboard sharing options	Desktop, application, and file sharing options	Desktop, application, and file sharing options.	Desktop, document, and internet window sharing options.
Collaborative Features	**Adobe Connect**	**WebEx**	**Zoom Business**	**BlueJeans**	**Microsoft Teams**	**Google Hangouts**
Breakout Rooms	Yes	In WebEx Trainings, not	Yes, can pre-program	Yes (can't be pre-	No	No

		WebEx Meetings		programmed)		
Polling	Yes	Yes, but can't preload poll questions.	Yes	Yes, but can't preload.	Yes	No
Chat	Yes	Yes	Yes	Yes	Yes	Yes
White Board	Yes	Yes	Yes	Yes	Yes	No
Annotation	Yes	Yes	Yes	Yes	Yes	No
Other Features (Raise Hand, Emoji)	Raise hand	Raise hand	Raise hand, yes/no buttons, thumbs up/down	Raise hand	Raise hand, 'like' buttons	
Make Participants Co-host		No, must pre-designate alternate hosts	Yes	No, participants must join with the moderator code.	No	No
Security	Encrypted Calls	Fully encrypted meetings, including recording storage	Fully encrypted meetings, including recording storage	Fully encrypted meetings, including recording storage	Encrypted Calls	Encrypted Calls
Personal Experience/Tips	Currently used by USAID and other US government (USG) agencies so familiar to most USG participants; robust dashboards but can be overwhelming for new users	Used to be a platform of choice but many have moved toward Zoom and others. Still has good functionality. Considered by some to be more cyber-secure.	Poll function doesn't work through web browser; good balance of functionality and ease of use. Breakout rooms are easy and seamless but cannot be recorded. Can automatically close breakouts and force people back to plenary. There have been some cyber concerns raised due to hacking. USG users can only join via browser and many USG divisions are reluctant to use Zoom.	Chat is simple but host CANNOT see chat unless they have two screens or they pause their screen share and toggle back to BlueJeans window. Polls can only be multiple choice and breakout sessions cannot be recorded. Can automatically close breakouts and force people back to plenary.	No free option and often difficult for non-Microsoft users to access files and outcomes stored through Teams. No breakout room capabilities.	Can't record calls or do breakout rooms so limited capacity for larger, interactive meetings. But very widely accessible and easy to use