



The Virtual Meeting Norm:

Leveraging Technology to Drive Engagement & Project Advancement



Ken Schwartz,
AICP, NCICS

Planning + Design Service
Leader

kschwartz@vhb.com

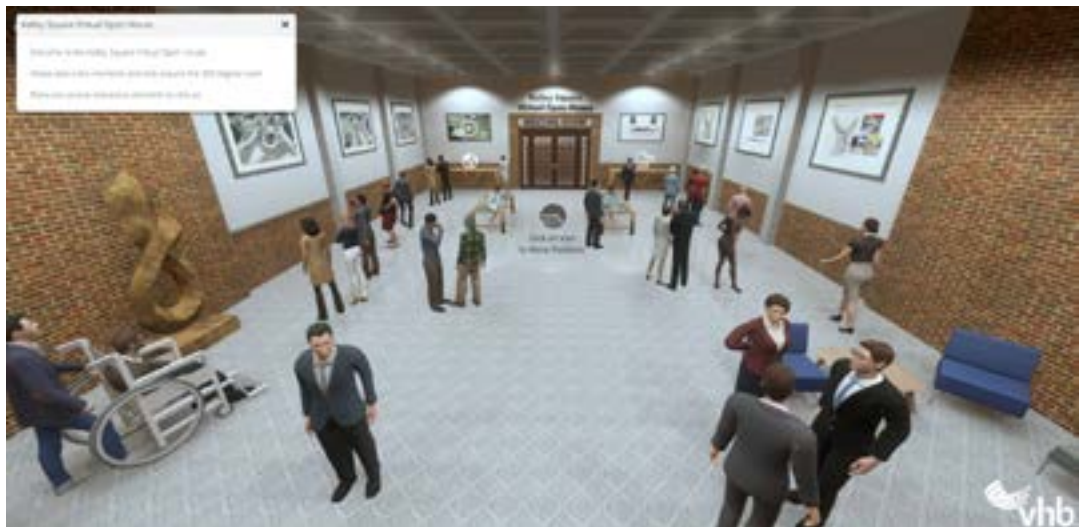
Virtual meetings have become a lifeline during COVID-19. Many businesses leverage technology to stay connected to colleagues, clients, and communities—and keep projects moving—despite remote workforces and stay-home orders. As the country and economy begin phased re-openings, the success of virtual meetings demonstrates that they are here to stay.

With an established business continuity program and technology investments made prior to COVID-19, VHB had the capabilities in place to immediately support our client partners. **Between March and June VHB assisted with more than 40 virtual meetings where input and decision-making were critical to advance initiatives.** This included public hearings, community meetings, board meetings, webinars, and site plan reviews for a wide range of clients:

- » Airport authorities
- » Departments of Transportation
- » Energy companies
- » Industry organizations
- » Municipalities
- » Private developers
- » Regional Planning Associations
- » State and federal agencies
- » Transit agencies

While in-person meetings will always be important, **innovations in technology, and effective application of that technology, make it possible to conduct meetings anywhere, even virtually, helping to reach wider audiences and move projects through the public approvals process.**

When in-person attendance is not possible, VHB's **Virtual Meeting Room** helps clients, communities, and stakeholders stay engaged and connected while maintaining social distance. The innovative tool makes it possible to conduct meetings anywhere and reach a broad audience. The fully customizable “room” is accessible 24/7 from any PC, tablet, or mobile device. It includes viewer engagement reporting capabilities and real-time data to capture public input and survey results. The go-to virtual platform provides enhanced accessibility and performance for all web-based users and helps keep public and stakeholder meetings—and critical projects—moving forward. Preview our [Virtual Meeting Room](#).



VHB's Virtual Meeting Room tool helps stakeholders stay engaged when in-person meetings are not possible.

Recent executive orders to address the COVID-19 pandemic give many states unprecedented flexibility to hold virtual public hearings and meetings. While each meeting is different—and often poses unique challenges—preparedness, creativity, and flexibility are key to successful virtual engagement. **Common questions include:**

- » What steps are necessary to implement a virtual meeting environment? Is there a resource available to guide me through the process?
- » What tools are available, including software and equipment?
- » Does my city or state allow virtual meetings?
- » How can I engage participants with disabilities or those who speak other languages?

VHB prepared the following **Step-by-Step Guide** and **Meeting Best Practices** based on our experience navigating new technologies and successfully implementing virtual meetings.

Step-by-Step Guide for Planning a Virtual Meeting

Planning and executing a virtual meeting can seem daunting. VHB has personnel experienced in implementing and facilitating virtual meetings who can help assess specific needs, determine appropriate solutions, and develop a plan that is tailored to your individual project needs. To determine the best approach, we employ a three-step process that includes needs assessment, choosing the right platform, and developing a plan for execution.

Step 1: Assess Your Needs

Questions such as how many participants do you expect; will a vote be required; will the meeting be interactive or directive; and will you need to share documents, drawings, or figures provide the information needed to determine the right approach.

Step 2: Choose the Right Virtual Meeting Platform

There are many platforms available to effectively conduct a virtual meeting or webinar, including Zoom, GoToMeeting, and WebEx. While virtual meeting platforms are an evolving space, VHB has found that these three platforms meet most clients' needs. We can help identify which platform is most appropriate depending on the type of meeting and level of participation.

VHB Helps MetroPlan Orlando Pivot to Virtual Public Meetings

COVID-19 closures and physical distancing impacted MetroPlan Orlando's ability to conduct essential in-person meetings necessary to urban transportation planning initiatives. With eight scheduled board and advisory committee meetings of 125 combined members, MetroPlan enlisted VHB to facilitate the agency's first-ever virtual public meetings. By leveraging a multi-disciplinary team of transportation planners, applied technology, and information technology leaders, VHB quickly provided video meeting procedures, moderator guidelines, virtual meeting host training, security best practices, and technology support. The result: MetroPlan Orlando is continuing important transportation planning efforts in the growing metropolitan area. [Read the full story.](#)



When using virtual platforms, it is important to understand the differences between a meeting and a webinar and determine which is most appropriate to meet your needs. Meetings are smaller in size (up to 40 participants), include multiple speakers, are typically fully interactive, and involve audience participation with all participants viewable. Webinars can accommodate larger groups (40 or more, even thousands) and usually only have one or two designated speakers. Participants and moderator may or may not be able to see everyone and audience participation is limited. [Learn more about Zoom meeting and webinar comparisons.](#)

Step 3: Execute a Virtual Meeting

The final step is execution and implementation, including setting up the platform, scheduling the meeting, outreach to participants, facilitating the meeting, and follow up. VHB works with clients to successfully execute virtual meetings in a variety of ways—from guiding through best practices to hands-on technical support prior to and during meetings, as well as meeting facilitation.

Meeting Roles and Capacity

Three groups of people are involved in virtual meetings: **hosts, panelists, and participants.**

- » **Hosts** set up and orchestrate a meeting. Hosts can facilitate participant engagement, similar to when the floor is opened for questions at an in-person meeting.
- » **Panelists** are presenters or voting members who are active participants in the meeting process. Panelists typically share content, such as documents, drawings, or figures and should be visible on screen to the audience.
- » **Participants** typically listen to the presentations with limited active involvement, similar to audience members at in-person meetings. Participants may ask questions or provide public comment.

Security

With higher than usual video conferencing occurring during COVID-19, cyber criminals are looking to take advantage. As an example, these criminals are registering domain names that are close to platform names and providing application installs that contain malicious content. If you are invited to a meeting, before you click the link, make certain you know who sent the invitation. If you still have questions, call the inviter to verify.

Another cybersecurity issue is Meeting-Bombing. This is when an uninvited and unwelcome participant joins a meeting and takes over the system. VHB suggests implementing these proactive protocols to make certain this does not happen.

- » **Do not make meetings public.** For example, in Zoom, there are two options to make a meeting private—require a meeting passcode or use the waiting room feature to control admittance of guests.
- » **Do not share conference links on public social media or websites.** Provide meeting information and links directly to invited participants.

- » **Manage screen sharing options.** For example, in Zoom meetings, change screen sharing to Host Only.
- » **Control participant changes,** such as renaming a participant or changing a profile picture. Also, there is an option that prevents a person from re-joining a meeting from which they were removed.
- » **Keep your client up to date.** Zoom, in particular, has been diligent about applying security updates rapidly and frequently. To see a running list of Zoom platform updates, click [here](#).

VHB conducted a virtual meeting aimed at establishing a vision and guiding design for improved transportation infrastructure in the City of Sanford, Maine.

“I thought it was one of the most constructive public meetings I have ever attended. There was significantly increased attendance over similar meetings we have had locally, and the structure allowed reasonable and productive participation.

Matthew E. Hill, PE

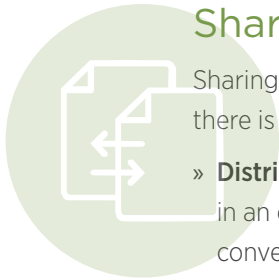
Director of Public Works, City Engineer, City of Sanford (Maine)

Meeting Best Practices

Facilitating virtual meetings is a new experience for many. At VHB, we’ve assisted many clients by sharing tactics and strategies that allow for seamless engagement and a positive experience for both facilitators and participants. Following are examples of best practices for facilitating a successful virtual meeting:

- » Clearly **define and assign roles** so the host and panelists understand the process and are prepared to navigate a virtual environment.
- » **Rehearse!** Run a mock meeting with a few participants to learn how the platform works.
- » **Test speakers and microphones** in advance and, if possible, use a headset.
- » **Know how to mute** the whole audience, mute yourself, and how to unmute an individual or another host when you want to allow them to speak.
- » **Mute all participants when a host is presenting** to avoid interrupting presentation flow. Instruct participants to raise their hands (digitally) when they want to comment or speak, and assign a moderator.
- » Ask participants to **submit questions to a designated moderator** using either email, chat, or Q&A functions. This allows for vetting and clarifications and provides a digital record of all questions asked.

- » Know how to **share and un-share content** (in case content needs to be updated or changed).
- » If using VPN or remote desktop from home, disconnect before starting the meeting.
- » If using shared internet service from home, ask others not to stream videos during your meeting.



Sharing Content

Sharing information is an important aspect of facilitating a successful virtual meeting. While there is no one-size-fits-all approach, below are several options:

- » **Distributing material prior to the meeting:** Post the meeting link, agenda, and handouts in an easily-accessible location in advance so participants can download materials at their convenience. Use a free viewer format such as Adobe PDF, which is readily available on all devices.
- » **Sharing during the meeting:** Materials can be shared on screen; however, some participants may only be listening (see Accessibility Strategies for Diverse Populations), so speakers or presenters should thoroughly describe or read the materials being shared.
- » **Mailing presentation materials:** When necessary, documents can be mailed to participants prior to the meeting. Plan ahead to allow ample delivery time.
- » **Pre-recording:** The presentation part of a virtual meeting can be pre-recorded prior to the event. The presentation can then be played during the meeting, as well as shared with those that will be listening but not viewing the meeting online.

“The Town of Brookhaven typically holds around 10 public meetings per month, ranging from town Planning to Zoning Board Hearings. COVID-19 presented a challenge that the VHB Team helped us to meet using Zoom webinars—as well as streaming live to local cable access and the Town’s online streaming service. In April, we conducted over 10 successful virtual meetings (public and private), with VHB able to troubleshoot and resolve technical issues in real-time to provide a smooth, user-friendly experience. Partnering with VHB and leveraging technology has allowed the Town to continue critical public and stakeholder meetings that are key to keeping our projects moving.

Matt Sabatello

Website Manager, Town of Brookhaven (New York)

Public Information Office





Recording

All platforms allow you to record a meeting while it is in progress and download it for future use. A link of the recorded meeting can then be shared so people unable to attend can view it later and provide feedback. Recording also helps with post-meeting documentation. There are several important considerations when recording meetings. Know your system capabilities to avoid missing or losing important content.

- » **Length of meeting:** Some software platforms have restrictions on the length of a meeting that can be recorded and stored, while others provide unlimited length.
- » **Storage options:** Some platforms have limits on how long recordings are stored before being deleted or before charges apply. Most provide the option to record in the cloud or to record locally.
- » **Transparency:** Let all participants and panelists know if the session is being recorded.



Voting and Polling

Platforms offer several options for virtual voting. The most common capability is polling. Polls can be launched during a meeting to get feedback from all participants, drawing from a pre-defined set of questions that are prepared and stored in the platform. Each participant answers once, and the host can decide whether to share the answers in real-time with the audience or just with other hosts.

When taking formal votes, including those requiring participants to take an action, such as approving an item on the agenda, we recommend using voice votes. With voice votes, each voting member is called upon by the host to provide their vote verbally. This allows for better record keeping and, combined with only unmuting the voting individual, confirms that the person called upon is the person voting.



Live Streaming and Public Television Integration

Understanding local government requirements for broadcasting meetings on public television is important. If the local cable company cannot tie its system into a virtual meeting, one option is to set up a digital media channel, such as YouTube, Vimeo, or Facebook Live to simulcast the meeting. Participants can visit the channel and watch the meeting and participate in a limited fashion via mobile devices and other connection methods to communicate and engage during the meeting.



Accessibility Strategies for Diverse Populations

Accessibility for participants and addressing the needs of diverse populations are key considerations when planning and executing a virtual meeting. Assistance may include qualified sign language and oral interpreters, assistive listening systems, and real-time captioning services. Accessible exchange of information for people who are blind or have low vision may require that printed materials are provided in alternate formats (e.g., braille, large print, audio recordings, or text on CD) or that notetakers are provided.

To accommodate English as a Second Language participants, VHB recently partnered with Nassau County, New York, to include live Spanish interpretation during a public meeting for their Five-Year Consolidated Housing Plan. Live interpretation is a built-in option for both Zoom meetings and webinars, allowing attendees to choose between English or Spanish audio with the click of a button. Translators are given a copy of the presentation a few days in advance to become familiar with the content and translation is performed in real-time.



Apps, such as [otter.ai](#), provide real-time transcription and closed-caption services for participants who are hearing impaired. The full transcription is provided following the meeting and can be shared with participants. VHB can help navigate specific local accessibility requirements and provide best practice guidance in areas such as invitation content, identifying and coordinating auxiliary aids and services, providing background information to people with sensory disabilities, and how to present audiovisual information to audiences with disabilities.

Virtual Meetings Create Efficiencies



Keeps projects moving forward



Provides more organized, controlled setting (eliminates mobility mentality)



Here to stay! Virtual meetings will be another way of conducting outreach



Allows for greater level of participation and engagement



Results in cost efficiencies (eliminates travel, meeting space expenses)

HOW VHB CAN HELP

VHB is a leader in using technology to improve operations and address our clients' issues and challenges. We continue to assist clients with a variety of virtual meeting needs, including choosing the most appropriate platform depending on the type of meeting and level of participation; conducting a test run to verify the network, sound, and video are functioning properly; executing the meeting, from platform set up to scheduling to facilitating and providing hands-on technical support; and providing a post-meeting recording, along with any transcriptions or translations.

These are unprecedented times! **VHB is here to help you navigate technology options, coordinate and implement meetings, and provide hands-on assistance to help you improve operations and keep your projects moving.** Contact [Ken Schwartz](#), AICP, NCICS, Planning + Design Service Leader today to learn more about making virtual meetings your modern reality.