Remote Trainings & Meetings Guidebook

the **firelight** group

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Purpose of the Guide

This guide has been developed to provide facilitators, moderators, and participants with the tools they need in order to effectively conduct and participate in remote trainings and conferences. This guide is available to share internally with Firelight staff to provide an understanding of our approach and standard practices when conducting remote trainings and meetings. This guide may also be shared externally, to inform participants with Firelight's standards, best practices, and expectations when conducting remote trainings and meetings.

This guide **does not** include step-by-step instructions on how to use different conferencing platforms and applications. Rather, it is a tool to provide generalized guidance on how to run effective trainings and meetings, regardless of what conferencing platform or method of communication is being used. The intent is to provide Firelight staff and participants with a useful tool that can be applied to a variety of remote trainings and meetings structures and platforms.

This guide outlines the minimum hardware requirements, strategies for preparing your participants, roles and responsibilities, examples of communication platforms and features, and challenges and solutions that frequently arise when conducting remote trainings or meetings.

1   Hardware Requirements

When preparing to conduct a session, the first step is determining the hardware and software requirements for the facilitator, moderator, and participant(s).

Outlined below is a list of hardware requirements for each meeting role.

1.1   Moderator and facilitator hardware

Both the moderator and the facilitator should have the same hardware available to them when conducting a session. It is the responsibility of both the facilitator the moderator to ensure they have all of these required materials in advance of their training. If some of these tools are not available, it is the responsibility of the individual to find alternative solutions.

Hardware requirements for the facilitator and moderator include:

1. **Two monitors** – one for managing all of your communication platforms, and a second for screen-sharing materials with your participants
2. **High quality web camera** – for most, the laptop web camera is sufficient, but you should check in advance of the training
3. **Ethernet cable** – this will help ensure a stable internet connection as you conduct the training

1.2   Participant Hardware

Each participant should have certain hardware available to them in order to successfully participate in a training or meeting. It is the responsibility of the meeting moderator to ensure that the participants have all of the available hardware in advance of the training (further outlined in Section 3.2).

At a minimum, participants must have:

1. **One desktop or laptop computer** – which they should have access to for the entire duration of the scheduled training or meeting
2. **A phone** – an important secondary means of communicating with your participant(s)
3. **Reliable internet connection** – experiment with your internet connectivity in advance of the training if you are concerned about internet speed
4. **Reliable phone service** – a good back up method for joining a meeting if you are experiencing internet connectivity issues

Ideally, participants will have the following hardware (in addition to the minimum hardware requirements):

1. **A second monitor** – one for managing all of their communication platforms, and a second monitor for looking at the associated materials, lessons, slides, etc.
   a. Alternatives to a second monitor can include:
      i. Using two laptop computers;
      ii. Using a laptop and a desktop computer; or
      iii. Using a tablet as a secondary monitor.
2. **Ethernet cable** - this will help ensure a stable internet connection as you conduct the training

2 Preparing your Participants

It is important to prepare your participants ahead of your training or meeting to ensure the greatest chance of success. This means that you need to be proactive in preparing the materials that will be used during the meeting, that you try to foresee the challenges that your participants might have in using the materials and the conferencing tool, and that you communicate with your participants ahead of time so that you reduce the likelihood of having to troubleshoot at the beginning of your meeting. This section of the guide provides strategies for preparing your participants.

Prepare an email to send to your participants that includes information to prepare your participants for your training or meeting. You may use and modify a templated email for this, set up a template email for reuse, or draft a unique email based on your circumstances. **A templated email can be found in Appendix 1.**

2.1 Preparation Checklist

Below, we have provided a list of items that should be prepared for your participants **in advance** of the training or meeting in order to ensure the training or meeting is a success.

1. Provide participants with all relevant materials;
2. Provide participants with a concise message that tells them how to join a meeting;
3. Provide instructions about how to use the conferencing platform and any other applications being used in the training or meeting;
4. Ask participants for a secondary communication method (email, phone number); and
5. Offer and provide any technical support that you participants may need.

Further details on each of these items are outlined in the sections below. By providing each of the above to your participants ahead of the meeting, you are setting yourself up for the best chances for a smooth and successful meeting or training session.

2.1.1   Provide materials to your participants

In the days before your training or meeting, make sure that all of your relevant materials are prepared and ready for use. This may include things like a meeting agenda, schedule, training manual, exercises, slide deck, or background reading. Share these files with your participants in advance of your scheduled meeting so that they have ample time to read and review the materials – 2 to 4 days in advance is recommended.

2.1.2   Explain how to join the meeting

Concise instructions for joining meetings by computer and phone should always be provided in advance of a meeting. "Join Meeting" default instructions provided by Zoom and GoToMeeting should be reduced to the bare essentials, as these lengthy default texts can hide the links or information needed to join a meeting. It is always a good idea to resend the "Join Meeting" email at least 30 minutes before your meeting is scheduled to start.

An example of simplified instructions for joining a meeting is provided below:

You may join via computer by clicking the link: https://zoom.us/j/3673894582
Or you may join via phone by dialling the following numbers:
+1-778 907 2071 (Vancouver) +1-587-328-1099 (Calgary)
and when prompted, enter the following meeting ID: 367 389 4582

2.1.3   Provide instructions about how to use the conferencing platform and other applications that will be used in the training or meeting

Information about how to use the applications or platforms you plan on using should be shared with your meeting participants ahead of the meeting. Instructional documents or guidebooks for applications that Firelight frequently provides training for such as Google Earth, ArcMap, etc. can be found on ShareFile. Instructions may need to be developed for other applications. Additional instructions may also be provided for conferencing platforms if it is expected that the participants will need to interact with some of the more hidden conferencing features such as the draw tool and feedback tool.

For most online conferencing platforms, the best way to provide participants with instructions on how to use some of the conferencing platform functions is to provide them with links to webpages that outline each step. We recommend linking to a website rather than developing your own internal materials because conferencing platforms are constantly changing, and time spent developing internal instructions and materials could quickly become obsolete. Applications such as Zoom have entire websites dedicated to instructing users on how to use their platform and are dedicated to keeping those instructions up to date with each iteration and update of the application.

2.1.4   Ask participants for a secondary means of communication

Prior to your meetings, secure a secondary method of communication from each of your participants. This will ideally be a phone number but may also be an email or alternative email. This ensures that if your participant has difficulties joining the meeting or their internet cuts out, you have a way to reach them on hand. A phone number may allow the participant to continue participating in the meeting if they continue to have internet issues.

2.1.5 Offer and provide any technical support your participant may need

Offer training and support in advance of your meeting if participants need help learning any new tools. Spending some time teaching tools one-on-one ahead of your meeting to those that need it will greatly smoothen your meeting and prevent the need to coach someone with multiple other participants on the line. This will make for a more successful meeting or training. This offer should be made in your materials email a couple of days before your meeting.

3   Roles & Responsibilities

When conducting meetings or trainings using a remote conferencing platform, it can be challenging to navigate multiple software platforms while also trying to focus on effectively delivering content and ensuring goals are being met. Participants may be using multiple methods to communicate with a facilitator, using some of the available communication platform features (raising hands, asking questions in a chat, etc.) – this can become cumbersome for the meeting facilitator to navigate. Additionally, participants may struggle with some technical difficulties during the meeting, and spending time focusing on helping them with their challenges can quickly derail a meeting, creating a stressful situation for the facilitator and a frustrating meeting experience for the participant.

In order to reduce the amount of pressure on the meeting facilitator, and ensure the participants have a positive experience, Firelight recommends having two staff members involved in trainings and meetings whenever possible: one as the meeting facilitator, and a second as a meeting moderator. These two staff members should work collaboratively in order to ensure that a meeting is running as smoothly as possible – allowing the meeting facilitator to focus on presenting the materials, while the moderator can work behind the scenes to assist participants, compile questions, and seek feedback.

Preparing participants in advance of your meeting will also ensure that your meeting stays on task. Providing participants with documentation that outlines their role and informs them on how they are able to prepare in advance will help facilitate a smooth meeting.

It is good practice to find someone who is available to be a moderator for your meeting *at least* two days in advance of your meeting, to ensure the moderator has adequate time to effectively prepare themselves, and ensure your participants are prepared in advance of the meeting.

The specific responsibilities of each of these roles is outlined below.

3.1   Facilitator roles and responsibilities

The meeting facilitator's primary role is to ensure that the goal, task, or purpose of the meeting is being met. The meeting facilitator is ultimately running the meeting and ensuring that participants are effectively engaged.

Specific duties **in advance** of the meeting include:

- Find an available moderator to assist during your scheduled meeting time; and
- Prepare relevant documentation that should be sent to participants in advance of meeting.

Specific duties **during** the meeting include:

- Ensure that the goal, task or purpose of the meeting is being met;
- Deliver content and present materials necessary for the meeting;
- Keep participants engaged and involved in the meeting;
- Keep meeting on task and on track; and
- Lead group discussions and ensure participants feel involved.

A meeting facilitator should have a good understanding of the communication platform that will be used, and should be comfortable with presenting screens, video, and other basic software functions.

3.2   Moderator roles and responsibilities

The meeting moderator's primary role is to work behind the scenes of the meeting, ensuring that it is running smoothly, giving participants the help they may need in troubleshooting and navigating the communication platform, and compiling any questions or concerns that come through different communication mediums for the facilitator.

Specific moderator duties **in advance** of your meeting include:

- Set up conferencing bookings;
- Provide materials and resources to participants that the facilitator has assembled;
- Provide participants with documentation outlining Firelight's expectations of good participation;
- Assist participants who need additional help in navigating the communications platforms you will be using (quick tutorial of the platform in advance, links to video tutorials etc.);
- Collect details about what hardware each participant has available to them throughout the duration of your meeting; and
- Collect secondary contact information from participants.

Specific moderator duties **during** your meeting include:

- Manage waiting rooms in conferencing platforms;
- Troubleshoot connection issues;
- Troubleshoot communication platform with participant;
- Help participants phone in to a meeting if they are experiencing Internet connectivity issues;
- Compile questions, watching for raised hands; and
- Moderate the chat.

If required, it is also expected that the moderator be responsible for any post-meeting contact or follow-up with participants after the meeting.

A meeting moderator should be highly competent in working with Firelight's recommended conferencing platforms. The moderator must be able to assist the facilitator in troubleshooting the platforms, as well as training participants on how to use the engagement options available on each platform. It is a moderator's responsibility to remain up to date on software platforms changes, so they are able to effectively assist and troubleshoot issues as they arise in a meeting.

3.3 Participant roles and responsibilities

The participants' primary role during a meeting or training is to engage, contribute, and remain as focused as possible. A successful meeting relies on active and meaningful engagement of participants. Firelight has expectations for participants in a remote meeting environment, as assessing participant engagement can be more challenging without visual and social cues that are evident when meeting in-person. It is the responsibility of the participant to actively participate in remote meetings – which may mean asking more questions and speaking more than in an in-person environment. This can help the facilitator by ensuring that participants are understanding the content being discussed and that the goals of the meeting are being achieved.

Specific participant expectations **in advance** of meeting include:

- Review relevant material and resources that have been provided;
- Read through any tutorial & training documentation that has been provided about the conferencing platform that will be used;
- Test your technology;
- Self-evaluate to determine if additional training is needed in order to use the communication platform [**Note: it is the responsibility of the participant to reach out to Firelight if they feel they need one-on-one assistance getting set up with the conferencing platform**];
- Plan a quiet space that you will use for the meeting;
- Make sure you have the meeting code and phone number readily accessible, and that you know how to join the meeting via computer *and* phone in case of internet connectivity issues;
- Provide Firelight with a secondary means of communication (email and/or phone number); and
- Provide Firelight with a list of the hardware that will be used during the meeting.

Specific participant expectations **during** the meeting include:

- Avoid leaving the meeting for non-emergency reasons;
- Demonstrate active engagement by asking questions and posting in the chat;
- Avoid multi-tasking;
- Reassure the meeting facilitator that you are engaged by turning on your video camera whenever possible and be camera ready; and
- Use the mute button when you are not speaking.

Firelight expects that participants are comfortable with the basics of the communication platform being used, and that a participant is able to join and leave a meeting room via computer and telephone.

4 Communication Platforms

Before beginning your remote training, meeting, or interview session, it is important as a facilitator and moderator to practice using the tools in the app so you will be prepared to teach your participants. Please note that it is critically important for the moderator to be comfortable with the selected app as they will be providing troubleshooting in case anything occurs during the remote training, as outlined in Section 3.2.

We recommend using an app to communicate with your participants that has a phone-in feature in case participants have a poor internet connection. This allows your session to be available to a higher number of people depending on their needs.

Prior to your remote session, be sure to collect the phone numbers and emails of the participants that will be joining your call. In our experience, moderators found it useful to reach out to participants individually if they experienced technical difficulties during the remote training session. It is also imperative that you keep in mind a secondary communications platform to conduct your remote training in case there are any large-scale technical difficulties that affect the everyone on the call.

Below we will list potential communication platforms and their capabilities for your session(s). Please note that we will only be suggesting platforms that have safety features that Firelight approves and recommends. Once again, we recommend that moderators test this technology prior to remote training sessions.

We recommend selecting one platform as a primary option and one as a secondary option for a back-up means of communication.

Firelight has accounts for the following platforms:
1. Zoom Business Accounts
2. Google Meet Basic Account
3. GoToMeeting Professional Account
4. Slack Standard Paid Subscription

4.1   Primary Communication Options
4.1.1   Zoom Video Conferencing Platform

Below is a list of features that are available in the Zoom application.

Please note that some of these features are not available with a Zoom Basic Account. Zoom Basic accounts will also time out meetings with more than two people after 40 minutes. We recommend having the moderator host the zoom meeting to troubleshoot or enable features. Alternatively, the moderator can co-host with the facilitator.

Feature	Description
Screen sharing	Share your screen with participants. This is particularly useful if you want to share presentations or a resource to ensure you and your participants are looking at the same thing.
Screen control	Allows the host to control the computer of a participant remotely. This is useful if the host of the meeting or the moderator wants to show a participant exactly how to do something within their teaching, for example, plotting a point on a map.

Note: This feature can only be enabled if the participant consents to it within their system preferences (Mac) or control panel (PC). |
| Built-in recordings | This allows you to save a recording of the lesson for participants to review at a later time. |

Chat features (group and one-on-one)	This allows the host and participants to communicate with each other and is useful for sharing resources and asking questions.
Join call via Internet or phone (dial-in conference line; toll-free number)	This allows participants to join the session either by Internet or by phone if they do not have a strong and stable Internet connection. Note: Participants that join by phone will not be able to see video features. This is also why we recommend recording lessons.
Scheduling syncs with Outlook and Google calendar	When scheduling a zoom meeting online or in app it is possible to sync the meeting with yours and participants' Outlook and/or Google calendars as a reminder.
Waiting room	This security feature allows the host to control who enters the Zoom meeting so that only participants are able to access the zoom meeting.
Breakout rooms	This feature allows the host to move participants to virtual rooms for small group discussions.
Emoji reactions/hand-up feature	This allows participants to use emoji reactions to raise their hand during the training or give a thumbs up when asked if they are comprehending the information being presented.
Whiteboard tool/screen drawing	This allows the host and participants to draw on the screen. It is particularly useful during presentations to underline an important point, or to gather comments collectively as a group.
Gallery view/speaker view	Each participant has the option to set their view to either gallery view (which provides an overview of each person in the meeting) or speaker view (which focuses solely on the person speaking). This can also allow the host to view all participants in the meeting.
Audio transcript/closed captions	This allows participants to see what people are saying through closed captions. Note: These closed captions are created live and are not always accurate. Audio transcripts can also be viewed and saved separately as a recording, however, this must be set up prior to the meeting.
Muting	Hosts do have the option to mute participants if they are being distracting, adding unnecessary background noise, or typing loudly.
Password protection	Meetings and meeting links can be password protected for participants only to access.
Change names	The host can change names of participants. This is especially advisable for those who have joined by phone, as multiple people doing so can quickly become confusing.
Personal meeting room	This allows the host and participant to come back to the same meeting code or reuse the same link/invitation multiple times.

Zoom Safety & Security Features

Zoom is most secure when it is password protected. This greatly reduces the chance of "Zoom bombings," which refers to the act of hackers who are uninvited to meetings attending, further outlined in Section 5.1. The waiting room feature also allows the host to choose which people are allowed to attend the Zoom meeting.

The password and waiting room features must be enabled when scheduling the Zoom meeting. Zoom will not require participants to enter a password if they are joining via the Internet as the link provided is

password encrypted. For this reason, it is important to share the meeting link only to people invited to the training session.

Below is a list of free features that are available in the Google Meet application.

Feature	Description
Present/screen sharing	Share your screen with participants. This is particularly useful if you want to share presentations or a resource to ensure you and your participants are looking at the same thing.
Chat features for group and one-on-one	This allows the facilitator, moderator and participants to communicate with each other and is useful for sharing resources and asking questions.
Sync meetings with Google calendar	Schedule Google Meet meetings in Google calendar and send email reminders to participants with the link to the meeting. Note: Participants will receive email and link if they do not use a Gmail account, however meetings will not sync to their calendar if they do not use a Gmail account.
Ability to create meeting codes in Google calendar	The facilitator/moderator can schedule meetings directly in Google calendar where a meeting code for Internet and phone can be generated automatically.
Captions	This allows participants to see what people are saying through closed captions. Note: These closed captions are created live and are not always accurate. Audio transcripts can also be viewed and saved separately as a recording however, this must be set up prior to the meeting.
Join call via Internet or phone (dial-in conference line)	This allows participants to join the training session either by Internet or by phone if they do not have a strong and stable Internet connection. Note: Participants that join by phone will not be able to see video features. We recommend direct follow-up with these participants.
Sync files from Google docs, Google sheets, Google slides, in Google calendar for Google Hangouts session	This allows important documents that will be discussed during the training session to be easily accessed prior to the meeting and during the meeting.
Change layout for different views of the participants/speakers	Each participant can change the way they see the participants in the meeting.
View participants	This allows the facilitator/moderator to view all participants in the meeting.
Personal meeting room	This allows the host and participant to come back to the same meeting code or reuse the same link/invitation multiple times.

Google Meet Safety & Security Features

Google Meet has limited security features via the free platform, though it is rare for a meeting to be hacked. For this reason, it is important to share the meeting link only to people invited to the training

session. Through a paid membership a host can be enabled who can choose to add and remove participants from the meeting.

4.1.3   GoToMeeting Professional Account
Below are the features available with a paid GoToMeeting Professional Account. GoToMeeting does not have options to use their service without a paid account.

Feature	Purpose
Join call via Internet or phone (dial-in conference line)	This allows participants to join the training session either by Internet or by phone if they do not have a strong and stable Internet connection. Note: Participants that join by phone will not be able to see video features. This is also why we recommend recording sessions.
Screen sharing	Share your screen with participants. This is particularly useful if you want to share presentations or a resource to ensure you and your participants are looking at the same thing.
Personal meeting room	This allows the host and participant to come back to the same meeting code or reuse the same link/invitation multiple times.
Chat features (group and one-on-one)	This allows the host and participants to communicate with each other and is useful for sharing resources and asking questions.
Meeting lock	This allows meetings to be secure and accessible only by those given the meeting code.
Office 365 plugin	Sync the meeting with yours and your participants' Outlook calendars.
Google calendar plugin	Sync the meeting with yours and your participants' Google calendars.
Secure encryption features	To ensure all information shared during the meeting is secured and shared only with participants in the meeting.

GoToMeeting Safety & Security Features
GoToMeeting has advanced security measures in place. GoToMeeting has a meeting lock that forces participants to enter a password before joining the meeting. They also have encryption features to ensure all information shared in during the meeting is secured and shared only with participants in the meeting.

4.2   Secondary Communication Options

4.2.1   Phone & Email
Obtaining participant phone numbers and emails may be the easiest secondary communication option. These should be collected in advance of the training and used as a secondary means of communications if a participant is experiencing technical difficulties, needs assistance logging into the primary conferencing platform, or is absent from the meeting. Section 2.1.4 describes when you should be asking for a participant's phone number, and Appendix 1 includes a templated email that can be used to ask for the participant phone numbers.

4.2.2   Slack
An alternative secondary means of communicating with your participants is by creating a slack workspace. This can be particularly useful when conducting a longer training course, where secondary means of quick communication may be more frequent. You can create a slack workspace for free that offers many of the features that you would need in order to chat with your participants.

Participants can only access the workspace if they are added to it by an administrator. Slack only has an option to conduct video training with multiple people through a paid account. Voice and video calls will only allow up to 15 participants at a time. There are limited features for remote sessions via Slack, however this is a great tool to use as a secondary platform as it allows participants to message the instructor and/or their classmates after the remote training session.

Feature	Purpose
Channels for group messaging	Create channels to communicate with participants in the classroom.
One-on-one messaging	Allows facilitator and moderator to communicate with participants or each other individually. Participants can also speak with each other individually.
Join calls via Internet	Remote calls with up to 15 people over an Internet connection.
Screen sharing	Share your screen with participants. This is particularly useful if you want to share presentations or a resource to ensure you and your participants are looking at the same thing.
Screen drawing	This allows the host and participants to draw on the screen. It is particularly useful during presentations to underline an important point, or to gather comments collectively as a group.
Share documents	Share documents with participants. Word documents, PowerPoints, Excel spreadsheets, .jpg, .png, PDF documents and more can be shared via Slack.
Emojis	This allows participants to use emoji reactions to raise their hand during the training or give a thumbs up when asked if they are comprehending the information being presented.
G Suite integration	Google calendars, Google docs, Google slides, and Google sheets can be integrated into Slack.

Slack Safety & Security Features
Slack is secure and only allows individuals added to the Slack workspace by an administrator to access this workspace. Channels that are created can be locked so that only certain individuals have access to information. Members of Slack channels and the workspace can be managed by admins.

5   Challenges and Solutions

Technical difficulties are not uncommon and it is best to be prepared for such challenges beforehand, so that you feel confident in responding in a way that minimizes meeting disruptions. This section provides an overview of common challenges alongside potential solutions.

5.1   Conference bombing (or "Zoom bombing")

"Zoom bombing" is when someone else, other than invited participants, enters the conference call and disrupts the meeting. They may take control of the video or audio, share their screen, share images or video that may cause harm, or share links that can hack your or your participants' computers. Zoom bombing can cause harm to our participants, and at minimum reflects on the professionalism of our organisation. It is something Firelight takes extremely seriously and would like to avoid at all costs.

In order to prevent Zoom Bombings from occurring, it is imperative that you understand the permissions and settings that you have put in place for your meeting. Below are a list of suggestions that can ensure that zoom bombers do not infiltrate your meeting or training:

1. Avoid sharing your meeting link publicly. Instead, encourage participants to RVSP or register by direct email, which will the provide them with details on how to phone into a meeting if they intend to join by phone.
2. Require a password to join your meeting (make sure that this password is shared with participants in advance of the meeting).
3. Do not let the meeting commence before the host has joined the meeting.
4. Use waiting rooms, which require the host of the meeting to approve and admit participants. The moderator should be primarily responsible for letting participants into the meeting room, but the facilitator can as well when necessary.
5. Keep your conferencing software platforms updated. The software developers are often coming up with solutions to help keep meeting rooms safe.
6. Educate your participants on the risks of zoom bombing and ask that they avoid sharing or clicking on links in the chat in case of phishing, unless made explicitly clear that the link has been posted for a particular reason. Alternatively, links can be shared directly via email.
7. Disable participants' ability to screen share in a meeting when it is not necessary, so the host is the only one able to share their screen.
8. Lock your meeting when everyone has joined to avoid anyone else from entering.

If a zoom bombing does occur when you are facilitating or moderating a meeting, take the following actions:

1. Stay calm. Avoid alarming any of the participants, calmly explain what is occurring, and assure them that you will handle it immediately.
2. The host of the meeting (facilitator or moderator) should mute the zoom bomber immediately.
3. The host of the meeting (facilitator or moderator) should regain control of the screen or audio.
4. Remove the uninvited participant from the meeting.
5. Lock your meeting from allowing anyone else to enter.

Report any zoom bombing that occurs in your meetings to Operations staff.

5.2   Internet connectivity

Internet connectivity issues can occur for anyone at any time, but particularly for participants who are living in more remote places. Even when all necessary steps for preparing your participants have been undertaken, and you understand the available internet connection and bandwidth of your participants, you may still run into issues. Ideally, if the moderator is able to address these issues while the meeting facilitator continues to host the meeting, the connectivity issues of one participant will not derail an entire meeting. Below are some best practices that the moderator can use to troubleshoot and minimize interruptions.

If the meeting host (moderator or facilitator) is experiencing connectivity issues:

- Set a co-host (likely the facilitator or moderator) so that in the event your Internet or computer experiences issues, it does not end the meeting for all of your participants;

- When screen sharing, turn off your webcam unless absolutely necessary;
- Close all unnecessary apps and try to avoid switching between apps during the meeting unless absolutely necessary;
- Use your Ethernet cable to connect to the Internet rather than WIFI;
- Sit closer to your router;
- Disconnect all unnecessary devices from the Internet; and
- Ask that anyone in your household or office who is using the Internet but does not need it disconnects.

If your participants are experiencing connectivity issues:

- Make sure you understand what the problem is (audio is cutting out, video is freezing etc.);
- Ask all participants to stop screen sharing;
- Ask if they have an Ethernet cable to connect to the Internet rather than WIFI;
- Ask them to sit closer to their router;
- Ask them to disconnect all unnecessary devices from the Internet;
- Ask that anyone in their household or office who is using the Internet but does not need it disconnects;
- Ask that they close all unnecessary apps and try to avoid switching between apps during the meeting unless absolutely necessary.

As a last resort, you may ask your participant to **phone into the meeting** instead of using their computer. Audio quality using a phone is often more stable than the computer.

5.3   Screen sharing

Be mindful of how you are sharing your screen with your participants. It is usually best practice to only share the specific document or presentation with your participants rather than sharing your entire computer screen. That way, if you minimize a window or receive an email or notification, that information is not being shared with your participants.

If you do need to share your entire screen with your participants, rather than just a single window, turn notifications off that you might receive while in your meeting or training (slack, email, etc.)

If your participants will be sharing their screens during a meeting, it is also important to communicate these screen sharing practices with your participants, who might not be as familiar with the technology. Make sure they understand how to share their screens, without sharing any personal or confidential information that is not pertinent to the meeting or training.

5.4   Video and/or audio not connecting when joining a meeting

Sometimes, when hosts or participants join a meeting, they experience audio or video connectivity issues. This can be for a number of reasons.

Some solutions to navigate this issue include:

- Make sure that when the participant or host joined the meeting, they selected to "join with video and audio";
- Check that your video and audio buttons are turned on when you are in the meeting;

- Close any other programs that use webcam or audio;
- Disconnect any Bluetooth devices that might be using your audio (headphones);
- Re-download Zoom app;
- Go into display settings on the app and check the audio and/or video settings;
- Make sure that you have allowed the conferencing app access to your camera and microphone (this will be found in the settings on your computer);
- Wearing headphones can also help improve audio quality.

5.5   Working from home

Working from home can be a challenge for many. For those who are used to working in an office environment, being close to other family members, working in a comfortable environment, or not having an adequate workspace can all impact how a participant is able to participate in a meeting or training. It can be helpful to get a sense of where your participants are working from, who is in their household, and how they plan on navigating your meeting or training from home, in order to best prepare for any troubles that your participants might experience. Some suggestions to improve your participants' experience include:

- Ask your participant to situate themselves in a quiet and comfortable space (to the best of their ability);
- Check if there are any alternative workspaces they could go to in order to improve their focus (library, community centre, band office, etc.);
- Leave some flexibility in your meeting or training for breaks, so that participants have time to tend to things they need to during break time rather than meeting time. If regular breaks are scheduled, participants will know that they are coming and are more likely to wait until break rather than interrupting meeting time.

5.6   Instructing to the void (participant engagement)

When conducting meetings or trainings in a remote environment, it can be difficult to navigate participant engagement. Facilitating can be uncomfortable without facial cues or body language to observe participant engagement. When participants have their audio muted and videos turned off, this can compound issues of engagement and the facilitator can feel as though they are instructing to a void. Below are a few strategies and good practices that can aid in maintaining participant engagement:

- Set participant expectations early on. Including the Participant Roles and Responsibilities section of this guide (see Section 3.3) in an email that is sent out to your participants can be a way of letting them know your expectations and their role as an engaged participant.
- Kindly ask that participants turn on their microphones and video in the morning and after session breaks.
- Provide participants with instructions at the beginning of your session on how to use some of the conferencing features (reactions, thumbs up or down, yes/no etc.).
- Greet participants at the beginning of your meeting or training. Take 10-15 minutes to introduce yourself and check in with participants. This can create space for you to get to know your participants, and for your participants to get to know each other.
- Check in frequently with your participants about the audio and video quality of your presentation. Video and audio quality issues can greatly impact participant engagement.

- Check in frequently while speaking to your participants, to make sure that they are understanding. Phrases such as "is that clear?" or "does that make sense?" provide your participants with space to engage with you and let you know how they are doing.
- Be mindful of which participants have been speaking and which have not. Provide space for those who have been quiet and give them an opportunity to share their thoughts.
- Use conferencing features like Zoom breakout rooms to provide participants with the opportunities to speak in smaller groups.
- Take frequent breaks. It can be challenging to stay focused and on-task in long trainings or meetings, so providing participants with regular breaks where they know they can tend to other tasks will help ensure they are focused during your meeting or presentation.

6   Final Recommendations

Conducing remote trainings and meetings poses new challenges for moderators, participants, and facilitators. This guide has been developed to prepare and familiarize moderators, participants, and facilitators with Firelight's standards, best practices, and expectations when conducting remote trainings and meetings, to ultimately ensure that Firelight's remote sessions are successful and informative.

Key takeaways from this guide that should be implemented for every meeting and training include:

1. Ensure that you and your participants have all the hardware and software they need in order to succeed in your meeting or training;
2. Find a moderator who is available to assist in a meeting or training, and ensure that the moderator is equipped to navigate the frequent challenges faced when conducting remote training or meetings; and
3. Prepare your participants in advance of your meeting or training to ensure that they understand their roles and expectations and are provided with the tools and resources they need to be a successful and engaged participant.

As Firelight continues to deliver and develop remote trainings and meetings, it is likely that this guide will be amended and refined. We encourage staff to share their experiences and lessons learned as we continue to conduct trainings and meetings, so we can be at the forefront of providing our participants with engaging, informative, and successful experiences.

If there are any questions or amendments you would like to make to this guide, please direct your questions to Lauren Tekano (lauren.tekano@thefirelightgroup.com).

Appendix 1 – Email Template to send to Participants

Hello all,

Thank you for committing to participate in [TRAINING or MEETING]. I would like to provide you with some additional details and resources in order to prepare you for our [TRAINING OR MEETING].

We will be using the [ZOOM, GOTOMEETING, ETC.] conferencing platform to deliver this [MEETING OR TRAINING]. Please make sure you are familiar with the basic functionality of this conferencing platform. Specific instructions on how you use this platform are outlined on their website here: [URL FOR CONFERENCING PLATFORM INSTRUCTIONS]. In particular, you will need to understand how to:

1. Mute/Unmute your microphone

2. Turn on your video camera

3. [ANY OTHER FEATURES REQUIRED FOR YOUR MEETING]

If you are having trouble with any of these features, please contact me in advance of our scheduled meeting and I am happy to assist you.

In order for me to ensure I am able to assist you to the best of my ability, I would appreciate if you could respond to this email with the following:

1. A **list of the hardware equipment you plan to use** for this [TRAINING or MEETING] (For example, a laptop, desktop computer, tablet, mouse, etc.)

2. Your **current phone number**. This will provide me with a secondary way of contacting you if we experience any technical difficulties throughout the session.

Lastly, attached you will find a list of resources and instructions that will help you prepare for our [TRAINING or MEETING]. Please read through all of the materials, to ensure that you have all of the information you need to effectively prepare. These materials include:

1. A copy of Firelight's Remote Trainings & Meetings Guidebook. This guidebook outlines the strategies and best practices Firelight has put in place in order to deliver successful remote trainings and meetings. Please pay special attention to **Section 3.3 Participant Roles and Responsibilities.** This section outlines Firelight's specific expectations for our participants when conducting a meeting or training.

2. [LIST OTHER RESOURCES SPECIFIC TO YOUR TRAINING HERE]

You should be receiving another email shortly that provides you with the link to join our [ZOOM, GOTOMEETING, ETC.] meeting.

We are really looking forward to having you participate in [TRAINING or MEETING], and please do not hesitate to contact us if you have any questions or concerns.

Appendix 2 – Zoom Operating System Requirements

The Zoom conferencing platform has quickly become one of the most widely used video conferencing platforms and is one of the primary conferencing platforms used at Firelight. This section summarizes some specific operating system requirements and hardware requirements in order to optimize Zoom on your computer. The information provided here is similar to those that you would require to use most common video conferencing platforms (GoToMeeting, Skype, etc.).

It is always recommended that you check the website for the specific conferencing platform you intend to work with to verify that you have the necessary hardware and operating system requirements in advance of your meeting or training. System requirements are subject to change, and the website will always be the most up-to-date place to go to check for information related to operating system requirements. The information provided below for the Zoom conferencing platform was up to date as of **June 2020**.

For the most up to date information go to: https://support.zoom.us/hc/en-us/articles/204003179-System-Requirements-for-Zoom-Rooms.

Minimum Operating System Requirements

Check with your participants to find out how old their computers are, to ensure that their computers will be compatible with the platform in advance of the training or meeting.

To find out the operating system and GHz information, go to "About the Mac" for Apple products or "System Properties" for PC. Most computers that are new within the last 5 years should meet the minimum requirements for using Zoom.

- Apple computers must be using Mac OSX with Mac OS 10.10
- PC computers must have the Windows 7 operating system at a minimum
- Apple Tablets (iPads) must be using an operating system of iOS 8.0 or higher
- Android Tablets must be using an operating system of Android 4.0 or higher and have a CPU of 1.5 GHz or more

Bandwidth Requirements

Bandwidth is the rate of data transfer across a network to and from your computer. It can determine your Internet speed and can largely influence how your computer will perform in a meeting. Low bandwidth can result in video or audio lags, delayed messaging, and other issues which can be problematic when in a meeting or training.

For this reason, we recommend that all moderators and facilitators connect to the Internet via Ethernet cable rather than WIFI. Connection by WIFI may result in lower bandwidth, and a less stable connection to the Internet.

Other recommendations if you are experiencing bandwidth issues:

- Close unnecessary applications and files that will not be used in the Zoom meeting (ask your participants to do the same);
- Have an additional method of communicating with your participant in case they experience connection issues (e.g. phone number or email)

Zoom Application Version

The Zoom conferencing platform regularly updates their software versions, so it is best to update your application whenever the application prompts you to do so. It is recommended to open the Zoom application an hour before a meeting to check for updates, as waiting for updates can cut into your scheduled meeting time. Typically these updates are short, but it is best to plan in advance whenever possible.