

Steps to Engage Partners in a Virtual Space

Step 1. Create a foundation for your event by reviewing internal meeting policies and procedures, and identifying key partners to engage in the planning process. Work with those partners to receive input and guidance on the meeting outcomes and, if part of a series, the overall plan, process, or vision for the outcome.

Step 2. Begin the procurement and selection process for an external facilitator, if needed.

Step 3. Clarify meeting purpose, goals, and outcomes to align with partner guidance, program or agency needs, and other requirements. Ensure you have alignment among the planning team.

Step 4. Establish meeting details, including the meeting and collaboration platforms, date, time, invitation list, and registration method. Begin recruiting support roles if you haven't done so already so you will be able to implement the meeting as planned. Incorporate considerations for accessibility in your selection of platforms, activities, and registration methods to gather accommodation requirements.

Step 5. Begin communicating with invited parties. Ensure materials are ADA-compliant, particularly that they are screen-reader friendly, in high-color contrast, and with text that recipients can magnify. You can let them know to "save the date," additional materials are forthcoming, and who they can contact with questions. If you require registrations, you could open registration as early as a month or more in advance, depending on the scope of the meeting. You might use emails, newsletters, partner networks, or other channels.

Step 6. Continue to develop and share the agenda among the planning team with key discussion points, timing, and roles and responsibilities during each segment. Additionally, continue to review incoming requests for accommodations and prepare to meet those requests.

Step 7. At least a week before the meeting, ensure registrants or invited participants have a meeting invitation with a corresponding calendar item that includes clear instructions on how to attend, who to connect with for technical support or questions before the meeting, what to expect (e.g., the agenda, templates, or other materials), and how to prepare (including any pre-meeting materials).

Step 8. Review the final list of participants and accommodations. Ensure that if there are participants who will require additional support during breakout rooms that the support staff facilitating the room is prepared with an equitable version of activities that have been planned in online platforms as needed.

Step 9. Host a full dry run prior to the day of the meeting if needed. Otherwise, at a minimum, do a 15-minute "tech check" among the hosts, facilitators, and support staff to clarify any last-minute questions.

Step 10. Welcome participants, establish ground rules, and monitor participation and engagement. Adjust as needed.

Step 11. Hold a team debrief session either immediately following the end of the meeting or soon after to reflect on successes, challenges, and improvements for the next meeting.

Step 12. Follow up with participants within a week with meeting notes, resources, a feedback mechanism, and next steps.