ICOMOS

international council on monuments and sites

Responsible Meetings & Events Checklists
Online Meetings Checklists

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Online Meetings Checklist

Online meetings should always be set up in meeting mode rather than a webinar to compensate for the lack of direct interaction, offered by physical meetings. Using the ICOMOS Meetings Registration Template will facilitate capture of a record of participants expertise and geographic diversity and is to be encouraged. This can also be used subsequently to inform any mandatory responses through the Annual Reporting Template for ICOMOS commetees and International Working Groups.

As with other meeting modes, an online meeting needs a moderator, who should be assisted by others fulfilling specific roles, such as a technical assistant / chat monitor, a timekeeper and even a translation team where relevant/required. Such considerations must be addressed before starting to set up a meeting.

Before opening the meeting, the moderator, should establish the basic rules. These include: introducing the resources, chat and other features where participants may ask questions, raise issues and share useful links and reference material; to mute and unmute themselves; continuously show presence, maintain eye contact and actively listen to and involve the participants, treating them with respect, observing them attentively and encouraging active participation. As the Moderator cannot see raised hands when sharing their screen, they need to have an assistant/ chat monitor to monitor the responses and chat features.

As it is more difficult for participants to follow online meetings because they can only see the other people in a small section of the screen, participants may also be encouraged to use the Speaker display mode for the meeting.
Both the organiser /moderator and technical assistant / chat monitor should be familiar with the technical equipment and the software to be used and ideally they should co-host the meeting. This will enable them to provide technical backup, such as muting side conversations, enabling screen sharing and creating breakout rooms, etc.

Adequate provisions should be made if translation services are required, and the moderator should provide this information, and relevant instructions, to participants.

Finally, where an international target audience is anticipated, participants should be encouraged to provide translations of written text shared in chat.

The several checklists that are provided as part of this Tool may assist you in planning and organising online meetings. Structured to address the three important roles involved when organising an online meeting:
- The meeting host/ organisers
- The technical host/support team
- The online participants

1.	Objective and TOR	Roles	Deadlines	Notes
1.a.	Are there mandatory Terms of Reference for holding this meeting? This can be checked with the Secretariat			
1.b.	Is the goal of the meeting clarified?			
1.c.	Should the details be disseminated through the International Secretariat (secretariat@icomos.org) and shared on the icomos.org/calendar?			
1.d.	Are you using the ICOMOS Meetings Registration Template (this template will automatically capture the expertise and geographic diversity of participants and can also be used subsequently to inform any mandatory responses through the Annual Reporting Template).			
1.e.	Is the agenda set?			

2.	Date and Time	Roles	Deadlines	Notes
2.a.	Is a time for the meeting chosen that suits most time zones of the participants?			
2.b.	Are time units identified for the various topics of the meeting?			
2.c.	Are breaks planned? Listening to online meetings is very strenuous. Thus, after an hour or so a break of 5 to 15 minutes should be planned			

3.	Meeting rules	Roles	Deadlines	Notes
3.a.	Are rules provided for who or how participants can ask questions?			
3.b.	Did you prepare a method for when and how cameras or microphones are on? (link to 'Did you know, keeping your camera on…..')			
3.c.	Did you request permission to record the meeting?			
3.d.	Will any recording be shared online for dis-semination?			

4.	Online platform	Roles	Deadlines	Notes
4.a.	Will a list of other participants be visible to all participants?			
4.b.	Will you need a chat function?			
4.c.	Will there be a document developed during the meeting (for example google docs)			
4.d.	Will there be questionnaires? (for example google forms)			
4.e.	Will a white board be needed? (for example miro board)			
4.f.	Will you use breakout rooms?			
4.g.	Is your ZOOM or other online meeting sub-scription adequate for anticipated numbers? Or will there be a limit to the numbers of participants?			

5.	Tasks for the team	Roles	Deadlines	Notes
5.a.	Are you tilising a (Draft) ICOMOS Meetings Registration Template , to gather baseline data required by the ICOMOS Carbon Reduction Strategy			
5.b.	Did you advise people where the meeting will be recorded and seek their consent where necessary?			
5.c.	Did you appoint : • moderator • assistant / Chat Monitorsomeone to check chats and ultimately save these as a record of the meeting • rapporteur • timekeeper • technical backup?			

6.	Invitation to meeting	Roles	Deadlines	Notes
6.a.	Did you clearly identify the object and any desired outputs?			
6.b.	Did you include a paragraph about the rules for the meeting?			
6.c.	Did you invite people to register? Are you using the ICOMOS Meetings Registration Template? (this template will automatically capture the expertise and geographic diversity of participants and can also be used subsequently to inform any mandatory responses through the Annual Reporting Template, monitoring of the ICOMOS carbon baseline)			
6.d.	Did you share/explain the technical issues with participants, so that all will be able to follow and participate in the meeting and utilise its features?			
6.e.	Did you share the agenda before the meeting starts so that all can prepare for the meeting?			
6.f.	Did you make sure all documents are available before the meeting?			

7.	Budget	Roles	Deadlines	Notes
7.a.	Have you considered the costs for technical equipment?			
7.b.	Have you considered the costs for technical assistance?			
7.c.	Have you considered the costs for the rent of the venue including infrastructure (furniture and technical eqzipment) where relevant?			
7.d.	Have you considered Cost for out of hours support, where the event is outside 0900 - 1700 hrs, CET?			

1.	Start of the meeting	Roles	Deadlines	Notes
1.a.	Did you check all the technical equipment?			
1.b.	Did you explain the technical equipment to participants?			
1.c.	Did you explain goals, aims, and rules?			
1.d.	Did you communicate the schedule of the meeting?			
1.e.	Did you communicate that after 60 mins there will be a (coffee) break?			
1.f.	Did you suggest a warming up round: each participant to introduce himself/ herself?			
1.g.	Did you plan an icebreaker round (see box). Are agendas divided among participants, are the different roles for the meeting explained?			
1.h.	If breakout rooms are planned, are they explained?			

Coffee breaks

Coffee breaks are as important in online meetings as in In-Person meetings. Participants are asked to get something to drink (i.e. coffee, tea, water, etc) and come back to the computer. Then all could chat in an informal way over their refreshment.

As an organiser you could add the rule that no work-related talk is allowed. If it is a large conference virtual break out rooms can divide participants into smaller groups to make informal conversations possible

2.	During the meeting	Roles	Deadlines	Notes
2.a.	Are different issues/tasks divided among participants/breakout rooms? Are these different tasks explained?			
2.b.	"Do you integrate "Deep listening"? (i.e. do you listen carefully to all participants, including their motions, which is even more important than in physical meetings)			
2.c.	Do you try to connect participants? Do you enable the participants to build relationships with each other, and enable encounters?			
2.d.	Are you strict with the time frame and breaks?			
2.e.	Are you strict with the agenda?			
2.f.	Are all questions that come up during the session collected?			
2.g.	Are participants enabled to ask their questions directly?			

Ice breakers

A short activity at the beginning of a meeting might help people to get to know each other and to participate in discussions more easily.

- The organiser imagines a thing (car, horse, aeroplane, house, etc.) Then all participants take a paper and a pencil. The organiser gives instructions without telling what the thing is: the organiser says: draw a triangle, a square on top, a circle at each side, etc.) At the end all hold their drawings into the camera and a screenshot of all drawings is made.
- Each participant holds up a random item that is found on his or her desk, and tells a short story: where it was bought, why the item is on the desk, for what it is used, how long it is there, etc.
- Participants should tell all what the funniest thing, the grossest thing, etc., was they had seen this week?
- Participants could explain (and show) what pet they have at home, even if it is a spider in the bathroom...

3.	End of meeting	Roles	Deadlines	Notes
3.a.	Identify outcomes, general conclusions, ongo-ing responsibilities, deadlines. Save meeting chat as a basic note of the meeting			
3.b.	Thank all participants.			
3.c.	Agree timetable for issuing notes where relevant.			

Some remarks

Never interrupt another speaker. Unlike face-to-face meetings where several voices can be heard simultaneously, some video/phone lines will only broadcast one voice. Parts of conversation can be lost. Provide extra time for people to answer questions as there may be transmission delays, or a delay in language translation.

Respond using the person's name. Other participants may not understand where the response is directed and not know what is then expected of them.

Be very explicit about thoughts and feelings. Communication is based 7% on words, 38% on voice, and 55% on visual impressions. Virtual meetings require more explicit statements to compensate for lost communication channels.

Don't ignore questions, collect them and ask them when a speaker has finished.

Allow participants to ask their questions directly.

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1.	Self reflection	Roles	Deadlines	Notes
1.a.	Did you keep to the timetable and breaks?			
1.b.	Did you keep to the agenda?			
1.c.	Did you collect all questions that come up during the session?			
1.d.	Where participants enabled to ask their questions directly?			
1.e.	Where participants visible to each other?			
1.f.	Did you sum up the main outcome of the meeting: what was achieved, what needs to be done in the next future, who will be responsible for these steps, etc.?			
1.g.	Did you thank all participants for active participation?			
1.h.	Did you announce at the end of the meeting that there will be meeting notes and minutes sent to all, where applicable?			
1.i.	Can / will you issue a proof of attendance?			

2.	Final tasks	Roles	Deadlines	Notes
2.a.	Are notes fine-tuned / edited?			
2.b.	Are they kept short and simple?			
2.c.	Are deadlines, decisions and important key-words highlighted?			
2.d.	Are there any next steps, if yes, are clear deadlines and responsibilities communicated?			
2.e.	Are the notes and minutes sent to all partici-pants in time (i.e. the date you communicated at the end of the meeting), will you issue proof of attentdance?			

1.	Equipment	Roles	Deadlines	Notes
1.a.	Is the chosen system adequate for the meeting?			
1.b.	Did you check that all participants will have access to it or have you explained how it may be accessed?			
1.c.	Have you sent an invitation to all participants to register on the platform in good time if needed?			
1.d.	If breakoutrooms, whiteboards, or working documents have to be shared by all, is the appropriate software available?			
1.e.	Will all participants have access to these tools?			
1.f.	If it is necessary to record the meeting, is there enough memory on the medium?			

2.	Visibility, Audibillity	Roles	Deadlines	Notes
2.a.	Is the camera position set, is the background suitable and are lights set so that all can easily hear and see the organsiser and team?			
2.b.	Are microphones tested?			
2.c.	Is it ensured that no disturbing noises can be heard during the meeting?			

1.	Final check before the meeting starts	Roles	Deadlines	Notes
1.a.	Did you plan to have a technical check 15 mins before the actual meeting starts?			
1.b.	Are you prepared to help participants log in?			
1.c.	Will the meeting be opened early and have people been invited to join the meeting early to give time for all log-ins before the programme starts.			
1.d.	Are all other required programmes opened and running (like breakout rooms, digital white-boards, digital word processing programmes, etc.)?			

2.	Technical check	Roles	Deadlines	Notes
2.a.	Does the internet, light, video and sound work?			
2.b.	Is the camera in position?			
2.c.	Is the microphone in position?			

3.	Lights	Roles	Deadlines	Notes
3.a.	Is the key lighting (main light source) posi-tioned? (75% of the light should be on the moderator's face, the source should be placed in a 30 – 45 degree angle from the moderator)			
3.b.	Do you use fill lights and backlights? If yes, are they in posi- tion? (fill lights are used to fill shadows that are created by the key light; they should be placed the same angle as the key light but on the opposite side of the setting;			
3.c.	Did you check that the room of the host is spacious to achieve high-quality lighting (if the lights are too close to the person the scenary might look blurred)?			

1.	Technology	Roles	Deadlines	Notes
1.a.	Are you familiar with the technology to be used during the meeting?			
1.b.	Do you understand how to use the functions and features that are available?			
1.c.	Do you probably need some extra time to understand the technology?			
1.d.	Do you plan some extra time before the meeting to cope with unforeseen technical problems, particularly at log- in?			
1.e.	Did you check your microphone?			
1.f.	Did you set up lights, background etc. so that all can see you, and the scenery behind you shows what you want that all others see?			
1.g.	Is your internet connection stable?			
1.h.	Are all other devices (cell phones, etc.) muted or set to vibra- te mode?			

2.	Agenda	Roles	Deadlines	Notes
2.a.	Did you read the agenda before the meeting?			
2.b.	Did you read terms and conditions?			
2.c.	Did you prepare yourself in how to ask questions?			

1.	Technical issues	Roles	Deadlines	Notes
1.a.	Do you stay close to the microphone so that all can unders- tand you?			
1.b.	Do you stay close to the camera so that you are clearly visible?			
1.c.	Do you speak clearly and slowly?			

2.	Technology	Roles	Deadlines	Notes
2.a.	Did you provide your full name when partici- pating? Not all might recognise you when you just provide your first name.			
2.b.	Do you use the rules for asking questions? Ne- ver interrupt others, instead raise your hand.			
2.c.	If asking your question? Is it short and preci- se? In Online meetings it is much more difficult to follow conversations, so short and precise questions and answers will help you to bring your agenda to the audience.			
2.d.	If you want to respond to a question, use the person's name. Others might not understand to whom your response is directed.			
2.e.	Did you check the feelings and thoughts of the other parti- cipants? Communication is based on words by 7%; in virtual meetings the other communication channels (38% voice, 55% visual impressions) are very limited.			

1.	Feedback and questions	Roles	Deadlines	Notes
1.a.	Did you fill in the Carbon reduction strategy questionnaire of ICOMOS?			
1.b.	Did you provide any feedback to the team in a timely and proactive manner?			
1.c.	Did you get back to the team with questions that were arising during the meeting but where not dealt with during the meeting?			
1.d.	Did you summarise the agendas for a follow up?			

2   **ICOMOS Responsible Practice Toolkit | Content**

Part 1: ICOMOS Carbon Reduction Strategy

Part 2: ICOMOS Responsible Practice Toolkit Introduction (this part)
        2 A: Online Meetings Checklist
        2 B: Hybrid Meetings Checklist
        2 C: In-person Meetings Checklist

Part 3: ICOMOS Carbon Calculator and Registration Template

Appendix 1: References and sources

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