

# *NOVA Research Company*

## Virtual Meetings Support Capability

Submitted to:

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## NOVA Capabilities for Conducting Virtual Meetings

NOVA is pleased to submit this capabilities statement to the NIHCATS III contracting office. NOVA is particularly well qualified and capable of conducting virtual meetings. Meeting support has been a core service provided by NOVA since 1986. Long before the COVID-19 epidemic, NOVA was planning and implementing virtual meetings for our clients. Our lead meeting planner Michelle Murray has been a Certified Virtual Event Planner since 2014. Since April 2020, and meeting limitations associated with the pandemic, NOVA has quickly pivoted and converted in-person meetings into virtual meetings. Our staff have worked closely with clients to move in-person meetings initially planned (and already registering participants) to an online format. We also have worked with clients to reimagine meetings as online events. This includes rethinking how many participants are invited, participant roles, session length, and ways to take advantage of the tools video platforms offer for engagement to enhance the meeting experience. Our capabilities for conducting online events and experience doing so are described below.

### Conducting Virtual Meetings

When developing a virtual meeting, NOVA collaborates with our client to identify goals and objectives of the meeting. This drives other factors including who will be invited, roles of invitees, selected videoconference platform, and a variety of other factors. Our approach to planning and implementation phases of virtual meetings is described below.

#### Planning Phase

During the planning phase, NOVA collaborates with the client to assist with developing the agenda, inviting and working with speakers and attendees, and identifying the best virtual meeting platform to use.

#### Developing the Agenda

NOVA provides assistance to clients in preparing an agenda that optimizes goals and objectives of the meeting keeping in mind the positives and negatives of fully virtual meetings. We understand that virtual meetings should be shorter and more directed than traditional in-person meetings. When attendees are joining a meeting from their homes or offices via video, there is more competition for their attention than when they are attending live and are a “captive” audience. We recommend shorter sessions and regular engagement through virtual tools available such as polls, chat, and breakout rooms. These tools create a more engaging meeting that attendees are less likely to disengage from or be lured into “multitasking” on other unrelated matters (e.g., checking emails).

#### Inviting and Working with Speakers and Attendees

For an online meeting format, it is crucial to invite speakers who are knowledgeable and comfortable speaking at a virtual event. NOVA staff are experienced in working closely with invited speakers to ensure they are comfortable with the technology that is being used and how it will unfold live. We plan out all the details in advance and then for more complex meetings we hold dry runs internally and then with speakers, presenters, panelists, and others leading the virtual meeting. These dry runs ensure that all speakers are comfortable with the technology and can focus on delivering their content. We work with speakers to make sure their content is

ready to share. We have worked with presenters sharing slides, video, and sound to use fully as many tools as possible to reach the meeting audience.

## Selecting the Best Virtual Meeting Platform

Federal agencies and private companies may require specific platforms to be implemented for a virtual meeting. However, when there are options, the platform should be selected based on the size, purpose, and specific requirements of the meeting. Three commonly implemented platforms for smaller meetings (under 50 people) include Webex Meetings, GoToMeeting, and Zoom. These platforms will support larger meetings, but meeting support staff may find it difficult to manage the process of muting participant microphones or disabling video broadcasts. For larger meetings, we often consider using Webex Events, GoToWebinar, and Zoom Webinar platforms. These large meeting platforms allow hosts, support staff, speakers, and panelists to be assigned a privileged role while restricting features for participants. By default, these meeting platforms allow only those in an elevated role to share their screens, unmute their audio, broadcast their webcams, and privately chat with other organizers. We consider the following features when selecting a virtual meeting platform:

### *Webex Meetings, GoToMeeting, and Zoom*

These platforms are best for small or “free-form” meetings where **all attendees** are allowed to:

- ♦ Mute/unmute their audio to speak on the call.
- ♦ Enable/disable their webcams to broadcast video to all participants.
- ♦ Share their screens to share slides or other content with participants.
- ♦ Openly chat, via text, with all participants.

### **Need Breakout Rooms?**

Of the above three commonly used platforms, at this point in time only Zoom allows for participant breakout rooms. The meeting host configures the number of rooms and room size, and assigns participants to each room, which can be a great way to engage attendees. Only Standard Zoom Meeting supports breakout rooms; the Zoom Webinar add-on *does not* support this feature, and this must be taken into consideration when planning for breakout rooms.

### *Webex Events, GoToWebinar, and Zoom Webinar*

These platforms are best for large or structured meetings where **hosts, support staff, speakers, and panelists** are allowed to:

- ♦ Mute/unmute their audio to speak on the call.
- ♦ Enable/disable their webcams to broadcast video to all participants.
- ♦ Share their screens to share slides or other content with participants.
- ♦ Openly or privately chat, via text, with all participants or individual participants.
- ♦ View a list of submitted questions and answer questions privately or share with all participants.

Participants have restricted roles and the host can define accessible features:

- ◆ Participants are muted by default but can be unmuted by the host or support staff individually or as a group. Support staff may request that participants use the hand-raise feature and be called on before speaking.
- ◆ Participants have their webcams disabled by default but may be allowed to broadcast video.
- ◆ Questions panel or chat—chat may be disabled between participants, with only a questions panel available to submit questions to the host, facilitator, support staff, and speakers.

Defining support roles in advance of the meeting will result in a smoother day-of-meeting experience. For smaller meetings, a single staff member may serve in multiple roles, but as participant numbers increase, it is helpful to have one or more individuals assigned to each role:

- ◆ **Host**—The host is responsible for scheduling the meeting, configuring the meeting details, and setting the meeting technical specifications. The host is able to monitor registrations in advance of the meeting, distribute registration invitations/reminders, and modify meeting options. Unless co-hosts have been defined, the host is responsible for starting the virtual meeting.
- ◆ **Facilitator**—It can be difficult to manage a virtual discussion or conference, but it can be made easier by assigning one person to guide the discussions, allowing the organizers and participants to focus on the meeting content. The facilitator also may be in charge of polling and checking-in with participants to ensure that all key voices are heard.
- ◆ **Technical Support**—Technical support staff monitor the questions and chat boxes, specifically to review and respond to technical issues (e.g., audio/video issues, difficulties accessing meeting features.) If an external support email address has been defined in advance of the meeting, support staff also monitor the email account for participant connection issues. Technical support staff also monitor the participant list and mute participant microphones when background noise or echo is heard on the broadcast.
- ◆ **Question/Chat Monitor**—The person(s) in this role manages the chat and question/answer features and is able to simplify questions and/or comments related to meeting content. The Question/Chat Monitor(s) simplifies or compiles similar questions and forwards them to the Facilitator to read aloud or otherwise address.
- ◆ **Timekeeper**—When a virtual meeting is designed to follow an agenda with defined presentation or session lengths, the Timekeeper is responsible for monitoring time allotted for each speaker presentation and overall session schedules. The Timekeeper should have an established method of direct communication with the Facilitator, either within the meeting platform or through external applications (e.g., Google Hangouts, Microsoft Teams) or SMS text message so that the Timekeeper can provide the Facilitator with prompts when a speaker's time limit is approaching. The Facilitator then can politely inform the speaker that time limits are approaching or have expired.

## General Tips for Virtual Meeting Organizers

1. Solve technical issues before they happen by testing technology ahead of the meeting. Prior to a virtual meeting, all organizers, support staff, and speakers should test the technology and make sure they are comfortable with major features. Hold a virtual staff meeting with each speaker in his/her office (or

home) and have each person join the meeting with no assistance. Discuss any difficulties or suggestions for improvements, and schedule a complete dry run and time it to make sure meeting components don't run over time allotted.

2. Limit virtual presentation lengths and ask for a copy of all presentations prior to the conference.
3. When delivering housekeeping details, remind speakers to make direct eye contact with their webcams and continuously ask participants to identify themselves by name and affiliation before they speak. This is also necessary for the summary writer. If speakers or key participants know ahead of time that they will not be able to join via webcam, they should make organizers aware of this.
4. Encourage participants to join with an enabled webcam, but also provide an audio dial-in option. Video conferencing can work very well, but it relies on a strong Internet connection. Use of webcams during virtual meetings is becoming the new norm, so let participants know expectations ahead of the meeting.
5. Make sure everyone gets a copy of the agenda ahead of the meeting, and let participants know if they are to submit questions and comments through the meeting platform or send them via email. If it is an open meeting and drop-in participants are prevented from asking questions, that information should be added to the agenda or announced at the start of the meeting.
6. Prioritize discussions to maximize the time people are looking at each other.
7. Use an icebreaker as a tool to reinforce interpersonal relationships when people may be feeling isolated—especially now.
8. If the meeting platform permits, ensure that personal chat is enabled to allow participants to connect, thereby fostering inclusivity and communication.
9. Use polling features to collect on-demand feedback from attendees on specific topics in real time and keep participants engaged.
10. Send reminders to participants a week before the start of the event, the day before, and on the day of the meeting. Include links to conference and contact information about where to go for questions and issues.
11. Remember to mute participants during presentations and encourage them to mute themselves when they are not sharing. For large meetings, consider using the webinar or events tier of a given platform, which allows only speakers and panelists to broadcast audio and video.
12. Develop a facilitator script that may include these elements:
  - ◆ Welcome
  - ◆ Housekeeping Items
  - ◆ Presenter Introductions
  - ◆ Q&A Session
  - ◆ Closing Comments.

## **Implementation Phase**

During the implementation phase, NOVA works with our client to ensure the meeting runs as smoothly as possible. NOVA staff coordinate closely with speakers so that they are comfortable with the technology. We provide a list of general tips to speakers and other attendees, including:

1. Join at least 15 minutes before scheduled start time to test video, audio, and slides.
2. Make sure to mute all electronic devices, including computers and cell phones.
3. Join with an enabled webcam. If you are not able to join with a webcam, let the conference organizer know prior to the meeting.
4. Make direct eye contact with your webcam and identify yourself by name and affiliation before speaking.
5. Disconnect from any VPN (virtual private network). If attendees use an employer-provided VPN service to access the company network while working remotely, the VPN may route the meeting connection through the network, which could lead to bandwidth bottlenecks.
6. Choose audio over video. Meeting platforms will suggest or automatically lower your resolution and may eventually turn off your video to adapt to your network quality. You also can do this at any time. Call in using the dial-in numbers in your meeting invitation to join via your cell phone or landline.

NOVA provides technical support during the meeting and assists with triaging a question or chat tool so that presenters and meeting leaders can focus on other aspects of the meeting. Our staff also help troubleshoot for attendees not able to connect audio or video during the meeting. NOVA staff provide in-meeting support for polling questions. Poll questions usually are decided upon and set up prior to the meeting; however, during a virtual meeting they are implemented and attendees respond with results displayed in real time on the screen. Poll questions are a great way to engage with an audience and often can spur discussion topics relevant to the meeting. They also can be used to “read the room” and assist the presenter in tailoring presentation content on the fly.

Once the virtual event has been completed, additional tools can be used to engage the audience and obtain feedback. Many platforms allow surveys to pop up at the conclusion of a virtual event. These surveys provide instant feedback from participants and can be used to find out what worked and what did not work, and for multisession events can even be used to adjust sessions on the fly.

Additionally, each meeting platform allows hosts to download meeting reports that include a list of registrants and attendees with their registration information and meeting-related metrics, such as attentiveness, time in session, log-in/log-out time, questions, chat, and other data, by participant. These reports can be useful for preparing a participant list or providing an overall picture of the meeting.

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## Demonstrated Success in Conducting Virtual Meetings

NOVA has demonstrated recent experience conducting virtual meetings. Below are a few of the virtual meetings for which NOVA staff have provided organization, moderation, and/or technical support.

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|----------------------------------|--|
| <b>Meeting Name:</b>             | <b>Health Profession Opportunity Grants (HPOG) Affinity Group Meetings</b>   |
| <b>Client:</b>                   | <b>U.S. Department of Health &amp; Human Services (HHS)   Administration for Children &amp; Families (ACF)   Office of Family Assistance (OFA)</b> |
| <b>Virtual Meeting Platform:</b> | <b>GoToWebinar</b>   |
| <b>Date:</b>                     | <b>February – September 2020</b>   |

**Description:** NOVA provided facilitation, hosting, and technical support to the Office of Family Assistance for a series of virtual meetings designed to create a space and opportunity for HPOG staff of similar roles across the country to come together to share their experiences, common challenges, and successful strategies. An Affinity Group is defined as a group of people having a common interest or goal acting together for a specific purpose. The goal of these calls was to provide a forum for HPOG staff to learn from one another and utilize each other as a resource. The virtual meetings were divided into three affinity groups based on job role: 1) Program Directors; 2) Job Developers/Employment Specialists; and 3) Case Managers/Coaches/Navigators.

NOVA selected the GoToWebinar platform for these monthly virtual meetings to allow for strict control over attendee audio broadcast during the meetings due to the large number of attendees (50-150). Participants were able to connect using computer audio or phone connection but were required to use the hand-raise feature to be called on prior to speaking during the meetings. Presentations were shared from a NOVA host computer with presenters either being given keyboard and mouse control or prompting the host to move to the next slide.

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|----------------------------------|--|
| <b>Meeting Name:</b>             | <b>HPOG Webinar—Scarcity and self-regulation during COVID-19: How can we better understand ourselves and those we serve?</b> |
| <b>Client:</b>                   | <b>HHS   ACF   OFA</b>   |
| <b>Virtual Meeting Platform:</b> | <b>Zoom Meeting</b>  |
| <b>Date:</b>                     | <b>July 14, 2020</b>   |

**Description:** NOVA provided facilitation, hosting, and technical support to OFA for a webinar presented by Dr. Michelle Derr, a Senior Researcher with Mathematica Policy Research. She presented an interactive and engaging Zoom session about the concepts of scarcity and self-regulation, and why they are so significant for both HPOG staff and participants during these challenging times. Following the presentation, the 209 registered attendees moved to breakout rooms for discussion and then rejoined the main meeting to report back on breakout discussions.

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NOVA selected the Zoom platform for this virtual meeting to meet the breakout room requirement. NOVA also implemented open-ended poll questions via the Zoom chat box to collect feedback from respondents during the presentation, which the moderator read aloud to the group. The zoom video spotlight feature was used to ensure the presenter was on screen at all times during the presentation and each speaker was on screen during the breakout room reports.

|                                  |   |
|----------------------------------|---|
| <b>Meeting Name:</b>             | <b>Center to Reduce Cancer Health Disparities—2020 Mentored Mock Review</b>   |
| <b>Client:</b>                   | <b>HHS   National Institutes of Health (NIH)   National Cancer Institute (NCI)   Center to Reduce Cancer Health Disparities (CRCHD)</b> |
| <b>Virtual Meeting Platform:</b> | <b>Webex Events</b>   |
| <b>Date:</b>                     | <b>June 2020</b>  |

**Description:** NOVA's conference support and information technology (IT) staff recently had to quickly develop solutions to address their support of the CRCHD Professional Development Workshop and Mentored Mock Review. The in-person meeting was scheduled to convene on June 8-9, 2020, but due to the global pandemic, the meeting was moved to a virtual meeting platform. NOVA identified potential webinar platforms, reviewed specifications with the client, and obtained Webex Events support through the NCI Center for Biomedical Informatics and Information Technology (CBIIT). NOVA IT staff quickly revised the meeting logistics and registration website to reflect the move to a virtual meeting platform. NOVA provided facilitation support during the virtual meeting and evaluation support following the meeting.

|                                  |   |
|----------------------------------|---|
| <b>Meeting Name:</b>             | <b>HPOG Program Roundtable Meetings—Subject Matter Expert Meetings and Dry Runs</b> |
| <b>Client:</b>                   | <b>HHS   ACF   OFA</b>  |
| <b>Virtual Meeting Platform:</b> | <b>Webex Meeting</b>  |
| <b>Date:</b>                     | <b>Winter 2019</b>  |

**Description:** NOVA hosted Webex meetings with OFA staff and subject matter experts to review presentation materials and agendas for roundtable meetings scheduled to occur in early 2020. The virtual meetings focused on slide and agenda content for the Mental Health First Aid Certification and Helping HPOG Participants Build Resilience sessions. NOVA selected the Webex meeting platform to allow for small, free-form group discussions with both NOVA hosts and subject matter experts performing screen share operations.

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|----------------------------------|---|
| <b>Meeting Name:</b>             | <b>QDS™ Training: MMP 2020</b>                                |
| <b>Client:</b>                   | <b>HHS   Centers for Disease Control and Prevention (CDC)</b> |
| <b>Virtual Meeting Platform:</b> | <b>GoToWebinar</b>  |
| <b>Date:</b>                     | <b>Summer 2020</b>  |

**Description:** NOVA supports survey development and data collection efforts of the CDC Medical Monitoring Project (MMP) using NOVA’s Questionnaire Development System™ (QDS™) software application. The MMP is a surveillance system designed to learn more about experiences and needs of people who are living with HIV. It is supported by several government agencies and conducted by state and local health departments along with CDC. NOVA provides annual QDS™ software training sessions to educate CDC and local project area staff.

NOVA selected the GoToWebinar platform for these training sessions to allow for strict control over attendee audio broadcast during the meeting due to the large number of trainees (~100). Trainees were asked to submit questions using the questions panel or raise their hands to be unmuted during the question and answer period. NOVA staffed the training sessions with a primary trainer to present the slides and live software demonstrations, a QDS™ support person to answer technical questions in real time, and an additional support person to answer technical questions related to the webinar platform or survey content.