

A. Best Practices for Leading Online



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Online video conferences have become platform of choice for connecting, learning, and facilitating. To what extent does exercising leadership look different online versus in person?

- “Give me six hours to chop down a tree and I will spend the first four sharpening the axe.”— Abraham Lincoln. Factor in more time to prepare for virtual meetings than you would for one taking place in person; budget time for troubleshooting technology before it officially begins. For more information, see [Coro’s Guidelines for Virtual Learning](#)
- When using online meeting tools, it is important to emphasize timeliness and active participation. Etiquette practices help improve the experience (e.g., muting the microphone when not speaking, using the camera to shift and maintain eye contact, using the hand raise feature for comments/questions, etc.).
- Practice inquiry. Ask questions, and encourage people to use a solutions-oriented mindset and contribute their perspective to the conversation.
- Finally, have fun, and encourage your participants to do the same. A sense of humor goes a long way!



APPLY

Consider an upcoming virtual meeting and ask the following questions:

- What is the purpose of the meeting? Establish clear and realistic objectives and, if relevant, specific deliverables.
- What is the roadmap (agenda) of discussion items and activities that will allow everyone to achieve those objectives in a virtual space?
- Who will be the lead facilitator, and what other roles are needed to set everyone up for success? What group agreements do you need in place to help people feel seen and heard?
- At the end of the virtual meeting, what are the next steps? Before you finish, gain alignment on decisions made, action items, and avenues for distributing the meeting information.



ADAPT & REFLECT

- How can you creatively translate in-person activities to meaningful, virtual experiences?
- What are the best online platforms for your community members to connect with each other, and what support can you provide to ensure their active engagement?
- Take time to step back and assess what you’re currently doing:
 - What’s working well?
 - What would you do differently?
 - What additional support do you need?

B. Meeting and Project Management (OARRS)



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- Imagine traveling from point A to point B. You need a roadmap. The same holds true for meetings. The OARRS tool provides a useful structure.¹
- First identify the destination: where are you going? This is your **outcome(s)**.
- Next, identify the path to get there. This is your **agenda**, and it will help achieve your desired outcome(s).
- Then, identify the various **roles** you need for the journey (facilitator, note-taker, time-keeper, etc).
- It's important to set the terms for participant behavior. These are shared **responsibilities**. How do you want to treat each other, how will you make decisions, etc.
- Finally, **summarize** the takeaways to ensure everyone is on the same page.



APPLY

A shared agenda that includes meeting outcomes will clarify meeting structure and keep your group focused. Make this visible to all, and consider these questions in advance:

- Outcome:** What do you need to accomplish during your time together?
- Agenda:** What is the plan/process to meet your desired outcome(s)? How much time do you need to discuss each item?
- Roles:** Who is leading the meeting? Taking notes? Keeping time?
- Responsibilities:** What are your expectations for behavior, timeliness, etc? Clearly identify other group guidelines.
- Summary:** What did you decide? What are the next steps and who is responsible for them?



ADAPT & REFLECT

- What are the outcomes in service of? What's your larger vision for your community?
- How can you use the [Tech Toolbox](#) to implement OARRS virtually?
- How might you adapt this tool to be more inclusive?
- How might this tool cater to different learning styles?
- Take time to step back and assess what you're currently doing
 - What worked well for you when using this tool?
 - What would you do differently next time when using this tool?
 - What additional support do you need?

¹ Adapted from David Sibbet and [Grove Consulting](#).

C. Group Decision Making



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Working in groups, there are many ways to make decisions. Sometimes it helps to first gain insight into the response to an idea, and identify areas of support and resistance.

- ❑ A facilitator can use the Fist to Five tool for consensus building. A fist or a 1 means a no vote, and two or more fingers is a yes, with an indication of how positive a yes it is.

Number of Fingers Raised	Meaning
5	I wholeheartedly agree and support the decision.
4	I agree and support the decision.
3	I am in the middle. There are things I like and dislike about the decision, but I will support it.
2	I have reservations about the decision, but will be supportive.
1	I disagree with the decision, but will not block it.
Fist "0"	I block this decision.



APPLY

Fist to Five Process:

- ❑ Think about a proposal your group is considering—one that has already been discussed. To gain insight into the degree of agreement with the proposal, take a vote using Fist to Five.
- ❑ First, ask people to raise their hands high with the number of fingers that indicate their degree of agreement with the proposal. Then, everyone can take a look around to gauge the general opinion of the group.
- ❑ If there are people with fists or one finger raised, ask them to share their objections and offer possible solutions to overcome their objections. Then, take a second and final vote.
- ❑ Using Fist to Five can save a lot of time in the early stages of a proposal. For example, if an early check reveals all 4 and 5 fingers, meaning no one would block consensus, the group can move forward to address other issues.



ADAPT & REFLECT

- ❑ *What is the existing level of trust in the group?:* When perceived risk is high, groups may need more discussion to reach agreement. If trust is high, alignment may be readily acceptable. In alignment, all parties are prepared to support a decision even if it is not their first choice.
- ❑ What methods do *you* regularly use to make decisions?
- ❑ How are decisions typically made in your community?
- ❑ Take time to step back and assess what you're currently doing: What works well? What