



Planning For VIRTUAL Adult Collaboration Agenda Development Tool

Developed by the Center for Leadership and Educational Equity

Refer to [CLEE Tips for Facilitating Virtual Adult Collaboration](#) for overall strategies to: maximize technology, set (and meet) realistic expectations, boost connections to each other, and ensure equity of voice.

How to use: Make a copy of this document and adapt to fit your team's needs as you develop your agendas.

Part of the Agenda (estimated time)	Purpose and Notes <i>Facilitator tips</i>	Resources
Tech Check-In (3 mins) 	To ensure all participants can access the meeting. Remind participants to ☐ Turn on video to humanize interactions. ☐ Use headphones and mute microphones when not speaking to minimize background noise. • If you are hosting the meeting, practice on the meeting platform ahead of time. • In advance of the meeting, send out directions for how to access the meeting, turn on video, mute microphones, and access accommodations. • Designate a person to share their screen to show the agenda or presentation slides so participants do not need to move between tabs/windows. Zoom to 125-150% so everyone can see. • Inform if the session is being recorded. • Establish the purpose of the chat box and when you will be using it in the agenda, (i.e., for tech issues, during the opening and collaboration).	Getting started with: Google Hangouts Meet Zoom Microsoft Teams
Goals for the Meeting (2 mins) 	To establish the purpose and goals for the meeting and review the agenda. Meeting Goals • <i>Insert goals here.</i> Set realistic goals for virtual collaboration. Things can take longer online.	

Created by CLEE (www.clee.org). Please use to further your professional practice, give credit and/or use CLEE logo on materials, and do not exploit for profit.



Planning For VIRTUAL Adult Collaboration Agenda Development Tool

Developed by the Center for Leadership and Educational Equity

Clarify Roles (2 mins) 	To share leadership and ensure the meeting runs smoothly. <i>List who is doing which role here.</i> Develop a system for rotating meeting roles. Possible roles include: meeting facilitator, protocol facilitator, notetaker, process observer, chat moderator, screen sharer, tech troubleshooter.	Sample Role Descriptions Team Member Roles and Responsibilities (Elena Aguilar)
Opening Connections (3-15 mins) 	To help people slow down and connect to one another and the work ahead. Prompt: <i>insert prompt here.</i> • Person 1: • Person 2: • Person 3: Choose a prompt from the bank of openings. Give 1-2 minutes of silent think time and up to 1 minute for each participant to share. Establish a speaking order in the agenda to allow the meeting to flow smoothly. Once one person shares, they can say the next name to speak. If you only have a couple of minutes, it's still important to slow down and connect to each other. Here are some quicker options: • Take 3 deep breaths or hold a minute of silence. • Have everyone respond to a prompt in the chat box and/or limit sharing to a word or phrase.	Virtual Openings in difficult times Bank of Openings that can be adapted for virtual use
Review of Agreements (2-5 mins) 	Determine your key purpose(s) in reviewing agreements: • To center the group in a mindset that supports collaboration. • To prepare the group to productively engage in conflict. • To hold up a norm that you sense will be particularly important in the work ahead. <i>List your norms here, at another spot on the agenda, or link them in a separate document.</i>	Openings: Tips for Reviewing Agreements CLEE Proxy Learning

Created by CLEE (www.clee.org). Please use to further your professional practice, give credit and/or use CLEE logo on materials, and do not exploit for profit.



Planning For VIRTUAL Adult Collaboration Agenda Development Tool

Developed by the Center for Leadership and Educational Equity

	With your team, think through how your team's norms apply to online collaboration. Are there any additional norms you need?	Agreements Additional Agreements for Virtual Collaboration									
Core Collaborative Experience(s) (time varies) 	To work collaboratively towards your meeting goals. <i>What experience, protocol, and/or text will support your goals? Outline the process in this section and include any relevant links.</i> Tips to ensure equity of voice • Use shared documents to facilitate collaboration. If you would like participants to offer feedback in a document, insert a table with a row for each person to type into. • Use the chat feature strategically. It can be used for sharing clarifying or probing questions or to debrief an experience. • Consider what should be done together in a meeting (synchronously) and what can happen independently (asynchronously) You can even pause a meeting to allow participants time for individual processing and reflection and then come back together. • If it is a larger group, how can you allow for breakout groups to meet? Some platforms allow for this.	Protocols Adapted for Virtual Use • Tuning • Consultancy • Back to the Future Additional Resources • All CLEE Protocols and Resources									
Next Steps (5-10 mins) 	To determine the concrete next steps that need to be taken, and who is responsible for them. <i>Include space in the agenda for recording next steps, such as the table below. Add a row for each item.</i> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">What?</th> <th style="width: 20%;">Who?</th> <th style="width: 20%;">By When?</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	What?	Who?	By When?							
What?	Who?	By When?									



Planning For VIRTUAL Adult Collaboration Agenda Development Tool

Developed by the Center for Leadership and Educational Equity

Closing (3-5 mins) 	To reflect on the meeting and provide inspiration for the work ahead. Reflection Options • Have the process observer share their observations around any of the following ◦ <i>Reflections on how a focal norm was enacted</i> ◦ <i>Examples of norms that the team is holding well or struggling with</i> ◦ <i>Patterns of participation and engagement</i> • Group Reflection ◦ Respond to a prompt using a speaking order, or by typing into the chat box or a table on the agenda. You can also have participants give feedback individually on a reflection form. ■ <i>Possible Prompts: What I am thinking now... One takeaway I have... A lingering question I have is... An appreciation I have for this group is...</i> Inspiration (<i>articulate your intention with the inspiration you choose</i>) • Share a poem, quote, or short video • Your reflection prompt can also double as an inspiration (sharing appreciations, takeaways, etc.)			3.2.1 Reflections Open Reflections (These can be turned into Google Forms to use virtually) CLEE Bank of Inspirational Closings