

Dear sDiv working group PIs and participants

This best-practice document should guide & support your preparation of a successful working group meeting with (i) every group member participating remotely (hereafter called fully virtual), or (ii) in a mixed setting, having part of the group in-person and others participating remotely (hereafter called mixed).

First, I am happy to say that during these unusual times, we are able to provide extraordinary support for funded sDiv groups via a number of pathways, including technical, administrative, and financial support. We aim to achieve maximum flexibility, and so please contact the sDiv head (Marten Winter) with any ideas or question you may have.

Some avenues of support we can offer:

- Virtual meeting platforms incl. breakout rooms (e.g. via Zoom)
- Administrative support with scheduling, drafting the agenda, correspondence
- IT support (e.g. access to [HPC](#), GITlab incl. chat function, rStudio, NextCloud-file sharing)
- Additional software solutions (including costs) upon approval
- Moderation of the meeting (during sDiv working hours)
- Coaching sessions for best practices for PIs and participants, training on software solutions
- Costs for travel for subsets of the group to meet in person outside of Leipzig (i.e., regional 'bubbles' for meeting)
- Local costs for individuals needed to participate (e.g. childcare at home, room rental)
- Costs for support of student helpers and/or data scientists (please contact sDiv Head for more information regarding hiring or contract possibilities [advance time needed])
- Other appropriate costs following discussion and approval with sDiv head

Introductory thoughts for a successful virtual synthesis group meeting:

A fully virtual or mixed meeting can achieve a lot. Although we fully support plans for virtual participation and moving projects forward, please be aware that the intensity of in-person interactions over several days is difficult to substitute via fully virtual and mixed solutions.

A few general things to be considered:

- Building a team needs more preparation & adapted communication for fully and mixed virtual settings.
- All participants should be given equal opportunities to participate actively in presentations and discussions.
- There is a significant time zone challenge.
- Usually, remote participants are still involved in their daily lives (e.g. families, work).
- All participants should try to create a work setting to be able to fully concentrate and actively participate in the virtual session (e.g. quiet places without disturbances and good internet connection etc).
- Be aware that the social aspect of being together is missing; try to include virtual social events and/or informal chats.
- Be aware that lengthy virtual meetings take a greater toll on participants than their in-person counterparts; plan length of meetings and breaks accordingly.

Check list to prepare your remote working group meeting

1. Timing/Format

- Ask every group member to **block the meeting times/days in their calendars** as if they would be away. This is the most crucial preparation for mixed and virtual meetings.
- Schedule an additional remote meeting (at least 4-6 weeks before the actual working group meeting) with a) Marten Winter (head of sDiv) and b) sDiv admin team to discuss and prepare all relevant aspects.
- Remote sessions shouldn't exceed 2-3 hrs with breaks (min 5min break/hr).
- Plan max. 2 remote sessions per day, not exceeding 4-6 hrs in sum incl. breaks, for 3 to 4 days.
- **Find time slots** that will work for all of your participants considering the [time zone differences](#) (please consider the difficulty organizing childcare outside of work hours)
- Share the burden of **the less optimal time slots** (very early, late) among the participants, or at least have an open discussion about the situation.
- **Individual time slots for breakout group participants – could be outside the regular meeting times** to better match time zones – breakout groups report back to the group
- avoid overlapping break out sessions if possible. often participants want to contribute to more than one topic
- Schedule an icebreaker session to start (some ideas: <https://conceptboard.com/blog/ice-breakers-in-virtual-teams/>), have everyone describe their environment (location, time, workspace) to acknowledge their situation.
- Plan a **short recap session** each day (think about recording those, so participants who couldn't join can view later)

2. Communication

Building trust when you don't see each other is complex. Trust comes from honesty & open communication. Trust and sympathy are crucial ingredients for successful collaborations. Do as much as possible to **reduce inequalities** among the different participants at all levels:

- **Communicate as inclusively and openly as possible.** Never assume everyone knows about all group related aspects or activities. Redundancy in communication is better than to not communicate certain aspects with all group members.
- **Include all participants (even if they can't attend)** in written communication.
- **Contribution will be more unequal** among participants than usual. Clarify with the very first communication what everyone expects, can offer and what this means (e.g. for authorships) in such a different working group setting.
- **Make sure everyone always feels and is included**
- **Use the camera as much as possible. Seeing each other** helps to get to know each other (i.e. building a team) and notice facial expressions.
- **Encourage informal chats** e.g. let people join a few minutes before the meeting starts, leave the room open after the session ends and do one virtual coffee break (include them as agenda points).
 - Set up video chat just for informal exchange, to have a place people can meet during breaks or after the end of the session
- An **early & inclusive discussion of data sharing and authorship** is critical. (see at the end of this doc for more info)

- Unfortunately there is no universal authorship rule, but: **discuss & decide as a team.**
- Significant contribution should always be a reason to be part of an authorship team. Contributions can come at different levels (data, coding etc).
- A mixed or fully virtual setting will also lead to unequal oral contributions in discussions. Make sure everyone's contribution is received & considered.
- Our experience is that an 'opt-in' model for authorship often works better.

Communication discipline is crucial. If virtual participants experience situations when they can't hear everyone (e.g. when discussions become noisy, busy because people interrupt each other etc), they lose attention & interest in a setting which is anyway already suboptimal.

- Make sure to have everyone speak in the beginning and end of meeting for integration and ask for feedback.
- We suggest a **buddy-system for mixed meetings**: pair one remote with one in-person participant to ensure that remote participants can approach someone with issues
- Set and follow **strict communication rules**, such as:
 - Mute yourself when not speaking
 - Use "raise hand" button via your icon (remember to lower afterwards) or use a "funny object" (in the in-person meeting) to indicate that you want to speak.
- Rules should be written and communicated all group members
- Identify someone for technical issues and moderation (could be shared)
- **Check back regularly with all (remote) participants**, if they can follow and/or want to contribute. Encourage the more quiet participants to contribute (but don't push too hard) either orally, or with written comments (e.g. in the google doc notes).

3. Work plan

- **Adapt your goals and expectations.** Remote meetings won't be as intense or productive as in person meetings.
- Create a detailed agenda with a goal for each session.
- Finish with clear work plan, tasks for responsible leaders.
- take minutes so participants can follow up after a missed session (assign a chat monitor, rotate all tasks among participants to distribute the load)
- We recommend having 2 chairs per session – one to moderate, one to take notes and take care of technical issues.
- **Distribute tasks** across participants. You feel more engaged if you have a task assigned to you.
- Have dedicated short feedback sessions.

4. Resources

Some great resources for **virtual meetings**:

- Hampton et al. [Best Practices for Virtual Participation in Meetings: Experiences from Synthesis Centers](#)
- CIEE – Canadian Synthesis Centre for Ecology and Evolution - [Virtual Meeting Guide](#)
- NCEAS - National Center for Ecological Analysis and Synthesis - [Virtual meeting best practices](#)

- SESYNC – National Socio-Environmental Synthesis Centre – [Tips & Best Practices for Virtual Meetings](#)
- SESYNC [Facilitation Guide](#)

Some great resources for more insights on **authorship**:

- <https://www.apa.org/science/about/psa/2015/06/determining-authorship>
- <https://nutnet.org/authorship>
- <https://journals.plos.org/ploscompbiol/article?id=10.1371/journal.pcbi.1006508>
- <https://dynamicecology.wordpress.com/2013/03/13/how-do-you-decide-authorship-order/>

5. Tools

Video Conference

We offer video conferences in *Big Blue Button (BBB)* or *Zoom* for virtual meetings. Both tools are suitable for hosting interactive virtual workshops. While Zoom is currently the most stable and familiar tool, BBB has very flexible features, and complies with the European Data Security Policy (GDPR).

Big Blue Button <i>Open sourced web conference system hosted by Leipzig University, GDPR compliant</i>	Zoom <i>licensed via Leipzig University, with certain defaults in favour of privacy protection (still – no compliance with the General Data Protection Regulation (GDPR)!</i>
Sessions: Parallel sessions/several meeting rooms possible, additional breakout rooms within meeting rooms	One session at a time, additional breakout rooms
Room access: via link, view in browser – no account or app needed	access via link– no account needed but runs better if app is used
Flexibility: Very flexible in terms of access, e.g. every participant is host and can start meeting	Many features only enabled for the host, e.g. initial start of meeting, creation of breakout rooms or recording (host role can be handed over to other participant, co-hosts have extended rights)
Recording: No recording feature – external tool needed	Recording function enabled for host
How To: https://bigbluebutton.org/html5/	How to: https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-Tutorials

Both tools offer:

- upload of presentations
- public and private chat
- share of screen / share of documents
- integrated interactive whiteboard (with multiple pages)
- integrated poll

Collaboration tools

will allow you to work on your topics outside of the precious meeting time. Try to establish those tools ahead of your virtual meeting. For most of them, creating an account and some initial training will be necessary.

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| - | File Sharing/collaborating: e.g. google docs / Nextcloud / Git Hub – place all documents, notes, minutes for everyone to catch up, conference links |
| - | Interactive Whiteboard: essential to exchange ideas and graphics in real time. Basic version included in video conference system, e. g. Zoom (can also be saved and reloaded). For more extended features (e.g., upload of documents, chat) and use beyond the meeting time check out e.g. Miro (creation of account/log in necessary to collaborate; for tutorials https://vimeo.com/mirohq), |
| - | Task Management: to organize your project, programs like Trello can be used |
| - | Chat: e.g. via Slack – set a channel for each session for comments and further discussion and a general one for communication among participants; request technical support during the meeting, etc.
https://mattermost.com/ - similar to Slack but open source |