



PARTICIPATION GUIDELINES FOR VIRTUAL MEETINGS (Before, During, and After)

Background

This document provides guidelines and recommendations for Chairs, Convenors, Committee Managers, and Meeting Participants - before, during and after a committee or working group virtual meeting to maximize efficiency and productivity.

Before the Virtual Meeting

Reminder: Meeting notices are required 8 weeks in advance for plenary virtual meetings and 4 weeks for working group virtual meetings.

Chair and Convenor

- Plan your meeting ahead in collaboration with your Committee Manager or Convenor Support:
 - Develop a clear agenda with realistic goals set. A 2-3-hour maximum duration is recommended for a virtual meeting. Plan for additional meetings in case more time is required to complete the work.
 - Anticipate items that may require longer discussions and think of options that could help the committee or working group move forward in your meeting.
 - Consider potential cultural or language barriers (if any).
- Work with the Committee Manager/Convenor Support in advance of the meeting to focus the agenda on action items and handle all informational reports in writing by correspondence, in order not to consume limited virtual meeting time on informational items.
- Discuss and decide with the Committee Manager/Convenor Support in advance how to run the meeting in practice (for example, who will host the meeting and control screen sharing, who will control chat and answer questions, who will mute participants, etc.). You may need to mobilize an extra resource to monitor comments.
- Familiarize yourself with the [ISO Code of Conduct](#) and with the definition of consensus in the ISO environment:

“Consensus: general agreement, characterized by the absence of sustained opposition to substantial issues by any important part of the concerned interests and by a process that involves seeking to take into account the views of all parties concerned and to reconcile any conflicting arguments.

NOTE Consensus need not imply unanimity.”

Committee Manager

NOTE: If a WG has no Convenor Support, Convenor also will need to consider these added tasks before, during and after each meeting.

- Create the meeting in the [ISO Meetings Platform](#) as “Virtual”. Please note that meeting notice periods have been shortened temporarily following [TMB resolution 32/2020](#). When meeting details are finalized, don't forget to 'Confirm' the meeting to enable registration.
- Circulate the meeting agenda, keeping in mind the following:
 - Add a link to the virtual meeting on [ISO Meetings Platform](#). Also note meeting details

- shall not be shared with ineligible participants.
 - List all items for discussion/decision and appropriate time dedicated for each item.
 - In consultation with the Chair, schedule important discussions/agenda points strategically – not necessarily at the end of the agenda.
 - Anticipate expected outcomes and decisions (e.g. draft resolutions if required) in advance for each agenda item. Prepare draft resolutions and a draft meeting report in advance, if possible.
 - It is recommended to schedule meetings for 2-3 hours (maximum) at a time and include a break. Spread a meeting over multiple days if more time is needed (bearing in mind the time zone challenges).
- Request national bodies to submit working documents in advance of the requested deadlines and inform the Committee Manager or Convenor of any agenda changes by a certain date before the meeting – 48-72 hours is recommended.
- Make efforts to accommodate the time zones of the virtual participants by rotating start times by region from one meeting to another. Consider tools such as timeanddate.com to manage your scheduling.
- Circulate these virtual participation guidelines to all meeting participants.
- Test your internet and Zoom connection well in advance of the meeting.
- Discuss and decide in advance with the Chair the practical aspects of running the meeting (for example, who will share their computer screen, who will control the chat and answer questions, who will mute participants, etc.). You may need to mobilize additional resource to monitor comments.

Meeting Participants

- Register for the meeting as usual through the [ISO Meetings Platform](#). Note that only registered members of a committee or working group can participate in an ISO meeting, and sharing meeting access with ineligible participants is not permitted.
- Request any final changes to the agenda before the stated deadlines.
- For committee meetings, confirm with your Mirror Committee who will serve as the Head of Delegation, who will speak on behalf of their national delegates and may invite other delegates to speak. Make sure that the Committee Manager is informed as to who has been designated as the Head of Delegation.
- Work out a communications plan among your delegates to be used during the virtual meeting. Do not use the meeting chat function for private communications to coordinate views among your delegation members. Use other tools such as text, WhatsApp, etc.

30 Minutes Before the Virtual Meeting

Chair and Convenor

- Test your connection well in advance. Plan to connect to the meeting at least 15 minutes beforehand to ensure it starts on time – See [ISO Quick Guide to Zoom Meetings](#).

Committee Manager

- Initiate the virtual meeting at least 15 minutes before the meeting starting time.
- Create and project a welcome slide that participants will see as they log in that will feature key reminders of important points on their virtual participation (stay muted, use the chat function, etc.)

Meeting Participants

- Select a quiet location, away from pets, children and other distractions. Turn off TV/music.
- Test your connection well in advance. Aim to connect to the meeting 10-15 minutes beforehand to ensure it starts on time – See [ISO Quick Guide to Zoom Meetings](#).
- Ensure mute is selected when joining to avoid background noise – all participants should enter a meeting on mute and put on a headset.
- If your meeting is expected to have high attendance or there are problems with bandwidth, turn off the video/camera function.
- If you are co-located with another participant, consider connecting with a single Zoom entry.
- Consider downloading the documents relevant to the meeting (agenda, draft document, table of comments, etc.) and have them ready for when the meeting starts.
- Be prepared when your agenda item or technical contribution comes up during the meeting. Heads of Delegation should be prepared to describe national positions when necessary.
- Ensure your full name – first name and surname – is provided on the Zoom participant area and consider adding national body affiliation or liaison association and role (e.g. John SMITH, ANSI, HoD). This will help the Committee Manager capture attendance accurately.
 - To do this, click on your name on the Participants list, select 'More', then 'Rename' to make your modifications.

During the Virtual Meeting

Chair and Convenor

- Share your screen as needed.
- Make sure your introduction has 3 elements:
 - “Human relations”: Welcome participants using their first name, clarify roles, set the atmosphere.
 - “Process”: Explain the logistics of the meeting and how you expect the virtual interaction to run.
 - “Structured objective”: Make sure participants understand the objective of the meeting and its expected outcomes according to the agenda.
- Introduce the [ISO Code of Conduct](#) to participants using the following [presentation](#).
- Tips to engage participants:
 - Always invite them to introduce themselves before they speak.
 - Note who speaks (especially when the webcam is off).
 - Engage those who speak less frequently.
 - Start your question using the first name of the person to make people feel at ease.
 - Take note of ideas/feedback from participants.
- Tips to help Chairs and Convenors achieve consensus:
 - Ensure participants have a clear understanding of the agenda's objectives, milestones, and timeline.
 - Learn, understand, respect and leverage cultural differences.
 - Seek to understand before being understood.
 - Foster cohesion and build trust.
 - Communicate directly and indirectly – some participants will use direct, explicit communication in asking questions and identifying problems, while others are indirect in asking and responding (e.g. chat function).
 - Decision-making: participants may differ in how much information and analysis they need to make decisions. Plan your meeting items and allocate discussion time accordingly. If discussions take longer than expected, consider reasonable re-allocation of discussion time or determine if decisions are possible through a committee internal

- ballot or an additional separate meeting.
 - Resolve conflicts quickly and peacefully. Take potential time-consuming issues offline to maintain meeting momentum.
 - Make sure any silence in discussion really does imply consensus – don't assume.
 - Just before a vote, summarize the points on which participants are expected to take a decision. The clearest option is to summarize the points on the shared screen – to avoid any misunderstanding.
- Manage discussions: For additional information on how to manage discussions during a virtual meeting, please see [Best practices to conduct virtual meetings successfully](#).
- Closing the meeting:
 - Clearly summarize decisions made and outcomes by sharing them on your screen.
 - Thank participants for their engagement, input and ideas.
 - End on time.

Committee Manager

- Ensure all participants are authorized individuals that have registered via the [ISO Meetings Platform](#) and that their attendance is noted in the attendance sheet. Call-in details shall not be shared with ineligible participants.
- If Heads of Delegation do not have the option to “Raise Hand” (if they are not connected through the web application), they should send their questions to the Committee Manager or another designated support person for the meeting.
- Share the computer screen as needed.
- Ask the Head of Delegation to introduce their delegation so that everyone knows who (including NSB or organization and name) is participating. It also might be easier for the Committee Manager or Convenor to do a read-out summary of attendance and check names that may have been missed, instead of waiting for individuals to speak up.
- Remember that local recording of a Zoom meeting is only permitted for the purpose of drafting minutes. All participants shall be made aware of your recording in advance and with no objections. See Annex SF.10 of the ISO/IEC Directives Part 1.
- Remind participants of the following:
 - For committee meetings, only the Head of Delegation can speak unless s/he gives the floor to someone else in the delegation.
 - Ask participants to ‘raise a hand’ or use the chat function if they wish to speak to avoid crosstalk.
 - Every time they speak, individuals should start by identifying the national body or organization they represent and their names.
 - Speakers are to speak one at a time, be brief, clear and speak slowly.
 - Participants shall mute their lines when not speaking.
 - Just before a vote, the Chair will summarize the points on which participants are expected to take a decision. The clearest option is to summarize the points on the shared screen – to avoid any misunderstanding.
- Involve participants throughout the meeting (including use of online chat, which can be saved).
- Suggest that any questions on reports and presentations are made AFTER they are completed, as switching between speakers can add delay to a tight agenda.
- Discuss with the Chair any items that may not achieve consensus during the meeting but may require a committee internal ballot for approval after the meeting.

Meeting Participants

- If you are late in joining the call, use the chat function to announce your arrival and wait for the meeting manager to recognize you, or wait for a break.

- If you have technology issues or need call details - contact someone you know who is on the call other than the Committee Manager or Convenor. They are likely to be involved in starting the call and may not be checking emails, text messages, etc.
- If your sound quality is low, consider hanging up and using the 'Call Back' function.
- In a committee meeting, start by identifying your affiliation (national body or organization) and your name. In a working group meeting, only say your name.
- Use 'Raise Hand' function first before speaking. Zoom maintains an effective queue for this.
- Speak one at a time, be brief, clear and speak slowly.
- Mute your line when not speaking.
- Do not put the conference call on 'hold' to take another call – particularly in the event you have 'hold' music that all participants will be able to hear. Please consider hanging up to take the other call, and re-dial back into the ISO meeting afterward.
- When voting/commenting, follow instructions given by the Committee Manager/Convenor – using the Yes/No function on Zoom, or using the chat function on the electronic meeting tool to indicate:
 - The national body or liaison organization you represent.
 - Your voting position, e.g. “BSI: yes” or “JISC: no” to ensure that the votes are correctly counted by the committee leadership.
 - It is preferred that only the Heads of Delegation in a committee meeting use the chat function if there are many participants, to ensure the Committee Manager has enough control over discussion flow.

After the Virtual Meeting

A feedback survey has been incorporated into [ISO Meetings Platform](#) and will automatically be sent to participants after the meeting.

Committee Manager (and Convenor)

- Ensure that meeting resolutions are circulated within 48 hours.
- Ensure the minutes, including the follow-up actions, are saved in the committee or working group workspace as N-documents within 4 weeks.

Meeting Participants

- Share your experience with us when you conduct web meetings, as your feedback will help us improve this guidance document. Feel free to share through the post-meeting survey and your Technical Programme Manager.

ADDITIONAL RELEVANT RESOURCES

- [Best Practices to Conduct Virtual Meetings Successfully](#)
- [ISO Quick Guide to Zoom Meetings](#)
- [ISO Connect information on Zoom Conferencing](#)
- [ISO Zoom Account Eligibility](#)

ISO/TC 301/WG 15 has been using the ISO Virtual standards development process (IVP) through a pilot for a year. Useful feedback and information on their experience is available here:

- [Feedback from WG 15 participants](#)
- [Feedback from WG 15 leadership](#)