**Tips for Convening and Moderating**

**Face-to-Face National Issues Forums Online**

This document focuses on some of the tips we have discovered while using Zoom in practice forums. It is not an endorsement of a platform; we hope these tips will apply to most platforms.

Note: “Co-host” can be interchanged with “Co-Moderator”

**Before the forum:**

1. Recruit a group of up to 14 people to participate in your online forum. The Zoom screen most comfortably shows 16 faces – 14 participants plus you and the co-host. Have them use their full (real) names to register; and to plan to join the forum using audio and video. Platforms such as Eventbrite or Google Forms are easy ways for people to register.
2. Send each participant a welcome letter that includes information about the forum, about the issue topic (this may include a link to access the issue guide or advisory, and a link to watch an overview video) and the Zoom link to join the forum when it starts. Ask participants to not share the Zoom link with any other non-participants.
3. Ahead of time, designate someone else to be the “co-host” to manage any technical problems and to show the starter video and display any slides or visual aids you may be using during the forum.
4. Familiarize yourself with the Zoom online platform (or whatever other platform you will be using); have one or two brief practice sessions with your co-host and any other team members you may be working with.
5. Decide how you will acknowledge forum participants who want to speak (choose one: physical hand-raising, raise-hand icon, use of chat box, let people just speak up when they want to talk,…)
6. Decide how much time you will spend on each part of the forum (Introduction, video/overview, each option, reflections)
7. Decide how you want people to use (or not use) the chat box – for example if you do not want people to start side-bar conversations in the chat let them know that the chat area is for technical questions only, or for sharing links to other resources, etc.

**During the forum:**

1. You may want to start the forum by welcome everyone, introduce yourself, go over a few technical items (like how to mute/unmute the microphone or the co-host could do this), and then invite each participant to briefly introduce themselves.
2. Let participants know what to expect during the forum (overview, personal stake, consideration of the options, reflections)
3. Proceed through the forum (guidelines, personal stake, options, etc.)
4. Leave enough time for the reflections part of the forum & questionnaire.
5. Thank host, any sponsors, partners, and participants, and end at the designated time; followup to participants after the forum.
6. If you and your team wish to use Zoom to discuss how your forum went, end the forum Zoom session and start a different Zoom meeting to hold your discussion.
7. Know that your work is valued and appreciated.