

Running Better Meetings

Session 1:

Effective Meeting Facilitation, Managing Conflict, and Running Safe Meetings

Agenda

- Logistics
- Effective Meeting Facilitation
- Managing Conflict and Running Safe Meetings

Topics

Effective Meeting Facilitation

- Setting the stage for a new working group
- General overview of tools/ practices in W3C
- Establishing group behaviour
- Fostering debate and discussion

Managing Conflict and Running Safe Meetings

- Establishing the CoC
- Defining the role of the chair
- How to handle incidents
- Understanding cultural differences
- Approaching situations with empathy

Logistics

This session is pre-recorded, and should be viewed before attending a live chair's training session.

Live chair's training sessions will cover any questions related to this session, as well as sessions on Tools and Handling Difficult Situations. Live sessions will not be recorded.

Who this training is for

This training is meant for chairs, taskforce leads, meeting facilitators, or people interested in taking on one of those roles in the future.

Effective Meeting Facilitation

Defining Effectiveness

- Is the group having constructive conversations about the work with a variety of participants?
- Is there a diversity of membership and opinions being expressed?
- Do participants feel welcome, heard, and supported?

Setting the Stage - New Groups

New groups (or newly re-chartered groups) are an opportunity to establish patterns, work modes, and procedures.

This can be done in a number of ways, and experimentation may be required to find out what is going to work for your group.

Introductions and New Participants

Ensure every participant has a chance to introduce themselves to the group, regardless of when they join. This can happen over email or in a meeting, whatever people prefer.

New participants should be greeted by chairs. A welcome email is a good way to ensure new members have the information they need. New members should know the key details of the group (call schedule, connection details, repositories, etc.).

Group Goals

Defining goals for a group should be based on your charter document, which will help the group determine its deliverables.

Groups can track goals in any way they prefer, but it can help to have a shareable goal or project tracker to keep chairs on top of schedules as well as helping new members understand what is being worked on.

Group Procedures

Starting a working or community group includes establishing some procedures:

- How often will the group meet and when?
- How will the group meet online, in-person?
- What modes of communication will we use?
- How will we manage scribing, queue management, documentation?

Meeting Cadence

When determining how often a group should meet and when, look at what factors you need to consider:

- Time zone distribution of the participants
- Time commitment for participants
- Work items

Remember that meeting cadence can always change or be amended if any of these factors change.

Meeting Location

Most meetings will be virtual, or hybrid. W3C uses Zoom as its meeting software, but there are alternatives and it's important to pick what will work best for your group.

For in-person meetings outside of TPAC, choosing a location can be a challenge. It's important to consider the travel needs or abilities of participants.

Planning Face-to-Face Meetings

In person meetings are a great opportunity to get your group together to work on tasks and get to know one another.

When planning them, make sure to consider several things:

- Location (do members of your group require visas or other documents to travel there, are there any travel restrictions?)
- Accessibility (including the venue, hotels, public transit, etc.)
- Safety (is this a country/state/province with laws that infringe on human rights that may impact your participants?)

Modes of Communication

There are a large number of tools and platforms working groups can use to communicate and manage communication. For the most part, W3C uses IRC (Internet Relay Chat) and email for most of its communication, but there are alternatives.

Choose the option that works best for the group, but consider the importance of working in the open and having accessible tools and records.

Meeting Management

Much of the role of the chair day-to-day is meeting management. Ensuring equal participation, the flow of discussion and maintaining a positive working environment are all part of chairing.

Establishing scribing responsibilities, queue management, and who will handle documentation like agendas and minutes as a group or amongst chairs will ensure consistency.

Chairing Resources

- W3C Chair's Guide
- The Process for Busy People
- The Process

Establishing Group Behaviour

Openness

One of the key parts of work in W3C is its openness. Anyone can see what we are working on, participate, and give feedback.

Openness can be delicate, and it's important to ensure the group is fostering open communication in its practices and behaviours.

Code of Conduct

The Code of Conduct (CoC), formerly known as the Code of Ethics and Professional Conduct (CEPC), was drafted by the Positive Work Environments Community Group as a guide to participant behaviour within W3C.

Chairs should introduce their groups to the CoC as early and often as possible, and ensure they are familiar with the document.

Inclusion and Diversity

W3C is committed to making the organization an inclusive and diverse space. Diversity will only strengthen the work we do, and inclusion will ensure a welcoming and supportive environment for people of all backgrounds.

Chairs should be conscious of ensuring the group is welcoming and supportive to all participants.

Incident Management

PWE is working on documents that will outline how chairs and other leaders within W3C should handle incidents. It can also be helpful within a group to share that information, or set ground rules of your own. Having a consensus on how the group may handle incidents can help prevent them.

Establishing a baseline of behaviour and how incidents will be handled will also help a group follow those standards.

Fostering Debate and Discussion

Approaching Topics with an Open Mind

Discussion and debate is part of the standards process, and many people, both participants and observers, will have ideas and thoughts they want to share.

As a chair, your role is to create space and ensure ideas are shared, discussed, and handled appropriately. Your role is to help determine the appropriateness of a topic, or whether your group can take on a task, not whether the idea has merit or not.

Encouraging Participation

Everyone who has joined a group has an interest in the topic or problem your group is working on. Their experience or familiarity with the topic may range from expert to newly-interested. Some people may consider themselves more or less technical than others.

As a chair, your role is to encourage and facilitate participation from everyone. This can happen in a number of ways, and the goal is to ensure everyone walks away feeling they have a stake in the work.

Balancing Voices

Inevitably, there will be people in the group who are more vocal than others. They could speak up the most in meetings, write the most comments, or log the most issues. Participants like this make chairing easier oftentimes because you can rely on them to have a comment or opinion.

However, it's important not to let those who are more vocal crowd out those who need more space. Some participants may need time to think on a topic before commenting, or feel discouraged because they're not as confident in their reply as the vocal one. Your role is to balance these voices, facilitate their participation, and make everyone feel heard.

Find Multiple Ways to Participate

It is helpful to create alternative ways for people to participate in group activities for multiple reasons. People may not always be able to attend meetings due to conflicts, or feel comfortable speaking up due to a language barrier.

Explore work modes to encourage asynchronous participation, like comments in GitHub, email threads, subgroups, or ask participants what they would like to do.

Managing Conflict and Running Safe Meetings

CoC

The CoC is a resource for all W3C participants to help understand what is expected of us, and what we can expect from our fellow participants.

When someone breaks those expectations, CoC also provides us with guidance on what to do, and how to approach these incidents.

CoC applies to all participants equally, but some roles hold more responsibility than others.

Defining the Role of the Chair

In the CoC, the role of the Chair is addressed in section 4, in regards to reporting violations. The Chair or Team Contact is often the best first contact in case of an incident. Chairs are empowered to take action in the case of an incident, as long as that action is in order to stop the harm and is proportionate to the action.

Chair as First Point of Contact

In most cases, a CoC incident will take place within the context of group work, like a meeting or in communications like IRC or email.

In those situations, when the chair is not the one committing the action, the chair or team contact is the first point of contact for someone to report the action, if they have not already noticed it.

As a chair, part of your role is to make it clear you are open and receptive to incident reporting, and will handle it appropriately.

If you find yourself involved

If a complaint is raised against you as chair, or involves you as a witness or participant, you need to step back from handling it.

Depending on the situation, it can be handled by co-chairs, your team contact, or an ombudsperson.

Emotional and Physical Safety

It is important to emphasize that while a chair does have a level of responsibility over the care and well-being of their group, the chair's well-being matters as well.

If a situation comes up where handling it would also endanger you in any way (physically, mentally, emotionally), it is important to protect yourself. Hand off the issue to another chair, a team contact, or ombudsperson.

Support

Your team contact is there to also support you in any issues that arise, and can connect you or people involved with support within W3C.

In addition to the team contacts, W3C has ombudspeople responsible for advising and handling disciplinary issues. The ombuds can assist in any way needed, including taking on a case and overseeing its resolution.

How to Handle Incidents

How you take handle incidents depends on the severity and complexity of the situation.

Factors to consider are the type of issue, how it has impacted the victim or group, if there is any immediate danger, the severity of the action, the frequency, and where it took place. Your safety, and the safety of your participants is paramount.

Between Expected and Unacceptable behaviour

In the CoC, we outline both Expected behaviours and Unacceptable ones, but in some cases, behaviour can fall into a grey area between both.

This is really where factors like frequency, impact, and judgement come into play. A behaviour or action that is an annoyance in isolation can become bullying, intimidation, or offensive when done repeatedly.

Documentation

Whenever an incident occurs, documenting it will help with understanding the factors. It can help you keep track of information and facts, which will aid in whatever steps are required.

Documentation should be private, with the privacy of the people involved preserved. This documentation may be needed in case of any escalation, or if an investigation is required.

Escalation Path

Depending on the issue, there are ways to escalate.

For most issues, resolution can be done within the group, either in person, online, or through email.

For more complex issues, processes like mediation or investigation may be required. In the most severe cases, disciplinary action or law enforcement may be required. In these situations, it's important to contact an ombudsperson to help you manage this process.

Handling Incidents within the Group

Incidents with the lowest severity or complexity can likely be handled when they occur. Handling issues quickly and calmly can be the best way to steer and demonstrate good group behaviour.

In cases where an issue is raised later, or occurs outside of a situation you observed, handle it factually and with the considerations of all parties in mind. This can be done over email or in any way the parties feel comfortable with.

Working with Co-Chairs and Team Contacts

Use the resources you have around you, including your fellow co-chairs, facilitators, or team contacts. As a team, it might be beneficial to discuss in advance how you would handle certain scenarios.

It is better to be prepared for something that does not happen than to be caught off guard by something that does.

Mediation

For more complex issues, or where other steps have failed, mediation might be an option. Mediation can be conducted by a chair or a professional mediator, to bring parties together to come to a resolution.

As a chair, you may be able to handle mediation for some situations, and your relationship and context with the participants might help.

If you feel an incident may require professional mediation or is beyond your abilities, it is time to contact an ombudsperson to help with what is required.

Investigation

If an incident is high in severity, frequency, or complexity, an investigation may be required. Like with mediation, an investigation would be performed by a professional.

An ombudsperson should be involved to help with handling anything required, and any documentation you have in relation to the incident will be needed.

Emergencies

If an incident ever takes place that constitutes an emergency, contact local services. This information will be made available to you for TPAC, and should be prepared by the chairs for a face-to-face meeting.

The important thing is to ensure the safety and well-being of participants, take whatever immediate action is required to do that. As soon as possible, contact an ombudsperson or a member of W3C staff.

Approaching Situations with Empathy

When an incident occurs, emotions are often high. Empathy is important in handling those emotions with care.

Remember that you may not understand why someone is hurt or impacted by the words or actions of another person. It is not your role to explain or find the reason, but it might be your role to find a solution or common ground.

Communicating and Understanding Cultural Differences

Part of what makes W3C participation exciting is the opportunity to work with people from all over the world who share the same interests as us.

Communicating and understanding one another is important.

Challenges of Communicating in a non-native Language

The primary language of communication within W3C is English, however that is not the native language of many participants.

Understand that for some, communicating their ideas in a language that is not their native one can be a challenge. They may choose not to speak until they are confident in making their point, or opt for other forms of communication like GitHub comment or email.

Different Communication Styles

Everyone communicates differently, and have different styles, preferences, and needs. Some people thrive in person, others prefer a Zoom call. Others still may need time and space to communicate their ideas.

Ensure you are giving participants options and space to communicate. Do not make assumptions on someone's opinion in the absence of one, silence is not consent.

Thank you for participating!

Being a chair or meeting facilitator is a key role in W3C, and we appreciate your participation in this training.

We have provided additional links to resources on the page, and if you have any questions, please reach out to the Positive Work Environments CG.