Tips for Facilitating a Virtual Case Review Meeting

1) Find a partner. Working in pairs allows the meeting to continue if one facilitator has connection issues. Consider designating one facilitator to be in charge of running the meeting, while the other plays a supportive role i.e. addressing technical issues, taking notes, monitoring the chat stream, etc…. The lead facilitator is responsible for keeping the conversation flowing, sticking to the agenda, ensuring everyone has the opportunity to be heard.

2) Develop and maintain a structure for your meetings. Even more so virtually, structure is essential to a case review meeting. It helps partners know what to expect, what is expected of them and when it is expected. This structure can and should be developed with input from your MDT partners, some teams have established a case review committee to help develop meeting structures and guidelines.

Any web based case review structure should include

- A review of the virtual platform being used and the key functions participants should be aware of (i.e. how to mute audio and video, how to join by phone if needed, how to toggle views, use chat function, share a screen etc..)
- Introductions. Even if everyone already knows each other this is necessary to know, and let others know, who's on the call and who isn't. Be sure to include name, role, department/agency, and whether they need to leave prior to the schedule close of meeting. Introductions can be challenging via virtual platforms, as the order of participants on everyone's screen will be different. Where possible, have participants ensure that the name shown under their image shows the correct name and what agency/discipline they are from. It's generally best to have the facilitator "call" on people to introduce themselves, however this will mean that facilitator will need to be able to recognize everyone if the name listed on their virtual platform account isn't one they recognize as many organizations share accounts. Facilitators will also have to ask those on the phone to introduce themselves by asking something along the lines of "could the person from phone number XXX please introduce themselves." Also ask that people introduce themselves by name every time they speak, even if they are on video.
- Announcements and other information that needs to be share. This is best shared at the beginning of the meeting to ensure those leaving early don't miss out on important info. Ask people to email the facilitator in advance if they have an announcement or information they'd like to share. This helps to manage time and control what info is being shared. It might be best to simply allow the facilitator to share all the announcements and identify who can be contacted for more info or with questions.
- Framing of the conversation and setting expectations. It is helpful to remind everyone of the purpose of the call, highlight key goals and objectives, as well as touch on what the call is not intended for. For example one might share "the purpose of this monthly call is to review active cases and address the needs of those clients listed on the agenda to ensure forward movement with the investigation and connection to appropriate services, any procedural or protocol concerns, or questions about how to change/improve the way we are responding to cases will be noted and addressed on our weekly MDT supervisors call." This will help ensure the conversation stays focused on kids and families and doesn't get bogged down in other matters. It is also helpful to identify and normalize the unique challenges of these virtual meetings, noting that they will likely take longer, may perhaps feel less productive, and require greater "offline" follow-up calls. Again this can help to manage expectations.

- Pre-determined order of "report out." Let participants know how the conversation will flow, don't just expect people to know what they should share and when. Providing an order such as LE then, CPS, then FI, then Medical etc… will help people to keep track of when they should speak. Some teams find it helpful to allow everyone to report out before any questions are asked, this helps ensure all disciplines are involved in the conversation.
- Description of desired information. It's helpful to let folks know what is expected of them. For example, you might save time by sharing identifying information on the agenda and letting people know they do not need to provide full demographics and a family history. You might simply ask for a summary of what people know, but what information they still need and what they need help with. If specific information from each discipline is needed such as CPS determinations, Prosecution status, Medical results etc… consider a discipline specific checklist that can be share in advance. Many teams already have these in place, however they may need to be amended for virtual calls.
- Timeframe for each case. Facilitators may serve a timekeeping role, allowing a set time for each case discussion before alerting the group that they've reached the end of time for this case and asking the team if they feel they need more time, or if we can proceed.

3) Be respectful of time and don't attempt to host a call much longer that 90 minutes. Shorter and more frequent calls will generally yield better participation and richer conversation than fewer longer calls. As travel isn't a factor many teams can generally find time for more frequent calls. That said, ask that people commit to the fully allotted time for the call to the best of their ability, and not just leave once their case has been discussed.

4) To the fullest extent possible, ask that people join using a webcam and not just connect via phone. Visual cues, even through the internet are extremely helpful to both participants and facilitators. Keep an eye out for:

- People trying to find their way into the conversation; be sure to invite them to share.
- Signs of fatigue. Consider offering regular breaks or invite people to stretch and move about as they need.
- Emotional cues, people are experiencing a range of emotions during these times, which can be easily exacerbated, be alert for such responses and perhaps invite people to step away should they need

5) Consideration should be given to the fact that for many these meetings will be a welcome source of distraction and perhaps a return to some degree of normalcy. For others it will offer an opportunity for connection and support. Take time to assess and possibly explore collectively how people would like to find balance in such calls. Perhaps the last ten minutes of a call may be devoted to checking in with each other, or doing so in a separate call all together.

6) Creating a space and process that allows a team to have a conversation, share information and make informed decisions is no small task. It is made more challenging via a virtual environment. As Facilitators, your role is to help make these meetings easier. Give yourself, and your team, some grace around this new reality. Facilitators can normalize these challenges by commenting on the process, sorting for positives, and making changes as needed.

Tips developed by the Southern Regional Children's Advocacy Center