

## Tips for Administration of Capacity Assessments with Remote Teams

### BEFORE

- **Keep the responding team size small**, using objective selection criteria, to ensure knowledge of innovation or topic (e.g., ongoing leadership team meeting attendance). Others can participate as observers.
- **Helpful to pre-meet** with at least the administrator/facilitator/note taker (though meeting with the whole team to ensure fluency with the technology is best) to:
  - **Practice any needed technology skills** (e.g., screen sharing, logging in, video/mic adjustments, check the phone app for the platform and how it looks, manage inevitable last-minute glitches).
  - **Identify back up processes** for specific video meeting platform (e.g., using chat to answer question, verbal roll call to answer if some participants are using the phone only or have limited internet connectivity).
  - **TIP:** Make sure to identify tech roles and spread them out across the team (display questions, monitor chat, monitor mute/unmute, keep score/notes).
- **Decide most efficient response method** (fingers, card, chat box, poll, etc.). Advantages/disadvantages to each:
  - Finger scoring (flat hand=dk, fist=0, 1 finger or 2 fingers) – efficient and fast, but need to make sure all have camera access, etc.
  - Poll – ensures anonymity but adds time and may require an additional platform or app to the video meeting, etc.
  - Chat box – not always available to all or may be used for other purposes, etc.
- **Check in with respondents** the day before the meeting. Ensure that everyone has access to printed or online copies of the assessment and remind them to have it available during the meeting.
- **Consider what to do** if administrator or facilitator get dropped from the call (as one example). Build in redundancies.

### DURING

- **Start by introducing EVERYONE on call with video on** (e.g., any guests, observers, etc.).
  - **TIP:** It's easier if only the **administrator and responding team members remain on camera**. Politely request everyone else turn off cameras/mute microphone and hold questions/comments until the end.
  - **TIP:** Look directly into the camera during introductions.
- **Display participant grid view with only the administrator and respondents** on it so you can quickly see who's ready to vote and their vote choice.
  - **TIP:** Use 2 screens. Using an extended screen function can show a visual grid of all respondents and allows for taking an efficient tally.
  - **TIP:** Consider who is sharing the screen to display the items for all. Administrator can share screen and be able to highlight phrases while note-taker can be entering data into SISEP.org, if that works better.
  - **TIP:** Use visual "thumbs up" sign when ready to vote (v. using thumb icon/eye contact).
  - **TIP:** If using a small screen, encourage the hand vote to be held high in screen so it is visible.

### AFTER

- **Bring back everyone on camera** (observers and others) to answer questions while graphs are being generated to share.
  - **TIP:** For capacity assessments on SISEP.org, download a .pdf of the full report – all graphs will be in one document to screen share and save time versus pulling up different graphs.