



Unmuted

What works, what doesn't, and how we can all do better when working together online.*

*As told by the people doing it every day

Unmuted

What works, what doesn't,
and how we can all do better
when working together online.

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POINTS OF LIGHT

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Too Much and Not Enough

“In-person communication resembles videoconferencing about as much as a real blueberry muffin resembles a packaged blueberry muffin that contains not a single blueberry but artificial flavors, textures and preservatives. You eat too many, and you’re not going to feel very good.”

Sheryl Brahnam, Professor, Missouri State University
(as quoted in [“Why Zoom is Terrible,”](#) The New York Times, 4.29.20)

In the millions of words written about the explosion in videoconferences triggered by the coronavirus pandemic, few speak as clearly as Professor Brahnam’s blueberry muffin metaphor. If your daily diet of videoconferences feels like one vending machine muffin too many, read on.

Meetings on Zoom may resemble meetings held in person, but the differences are profound. The same holds true for presentations, trainings, keynote speeches – just about anything that was once a distinctly different experience in person but has since morphed into one indistinguishable hour after another on screen. If staring at co-workers in little boxes all day long feels like empty calories, that’s because it is.

So, what can we do about it? That’s what we set out to learn: what’s working, what’s not, and how we can all do better when working together online. Our primary instrument for asking these questions was a survey conducted in July and August 2020 aimed at individuals working remotely for nonprofits and foundations, colleges and universities, and government agencies at all levels. *(Please see the Methodology section for more details about both the quantitative and qualitative phases of our research.)*

The 4,405 people who took our survey had plenty to say, and most of their “unmuted” responses could be summed up in four words: **too much** and **not enough**:

- **Videoconferences consume too much of the work week.** Across all sectors, respondents told us that they were being asked to sit through too many videoconferences for too many hours every day and that there were frequently times when a videoconference wasn’t needed at all. When we asked, “How often do you feel that a web meeting could have been conducted just as effectively (or even more effectively) via telephone or other audio-only formats?” 65% of respondents answered sometimes, frequently or always.
- **Not enough people feel sufficiently engaged or included.** When we asked what makes videoconferences a positive experience, “engaging presentation” was the most common reply. Simply put, it’s what people want most. “Lack of engagement” was the second most commonly reported negative experience (just a few percentage points behind “technical problems.”) We are also not doing nearly enough to ensure that the content of our videoconferences is fully

accessible to all participants, especially those who may have visual or hearing impairments, different learning styles, or lack fluency in a particular language. When asked, “How often have you seen convening leaders or facilitators create greater accessibility for the content (e.g., closed captioning, language translation)?” only 5% answered “frequently” or “always.”

- **There is not enough structure.** Battling distractions that come with working at home, constantly jumping from one meeting to another, struggling to keep professional and personal lives separate – these are everyday challenges for remote workers. No wonder, then, that they want every minute spent online to be used as constructively as possible. “Clear structure” was cited as the second most common attribute making videoconferences a positive experience, while “no structure” was the third most commonly experienced negative factor. In the comments section of the survey, nothing was more frequently mentioned than the importance of a good, clear agenda to ensure meeting time was not wasted.
- **Leaders and facilitators have not had enough training.** Nearly half (48%) of survey respondents who lead online meetings regularly reported having *no training* how to do so. If we’re building the plane as we’re flying it, too many of us are doing it without even reading the instructions.

[FROM THE SURVEY]

WHEN YOU HAVE ATTENDED OR LED WORK-RELATED VIDEOCONFERENCES:

What attributes make them a *positive* experience for you?

1. Engaging presentation
2. Clear structure
3. Interaction

What factors make them a *negative* experience for you?

1. Technical problems
2. Lack of engagement
3. Too long / No structure

One assumption that shaped our research was that huddled beneath the umbrella term “videoconferences” were distinctly different kinds of online convenings that deserved a closer look. The challenges of having a successful meeting, for example, are not exactly the same as conducting an academic class or professional workshop. What may work well with a group of five or ten people may not work at all when fifty or a hundred are involved. While our objective with this project was to find ways to make *all* kinds of videoconferences better, we suspected some of those ways would be specific to individual categories, and we didn’t want to miss them.

Ultimately, we divided videoconferences into “web meetings,” “webinars,” and “webcasts.” (please see *Defining Key Terms* on the next page for a full description of each) and drilled down on each category in separate sections of the survey. As we suspected, there are many noteworthy differences in how each kind of videoconference should be approached, and you’ll read more about those in the pages that follow. But as we dove deeper into the data, we were constantly reminded that when people describe what makes a good use of their time online, they tend to want the same things no matter what label you put on the gathering.

These common desires coalesced into the nine major takeaways that became the organizing principle for this report. Each takeaway has its own section with relevant data from the survey and includes recommendations for actionable steps to help improve your videoconferences going forward.

Who Should Read This Report

If you work remotely (or supervise people who do) and spend much of your day in videoconferences, this report was written for you. It may be most relevant to individuals working at nonprofits and foundations, colleges and universities, and government agencies at all levels, because those are the sectors most represented in our research and those are the “unmuted” voices speaking most often here. But the ups and downs of remote work are not unique to these sectors, particularly the downs – feeling isolated, battling distractions, struggling to keep professional and personal lives separate – so no matter what your line of work, we believe this report offers useful recommendations for you.

Before you dive in, please keep this in mind: As we prepared to publish, the world was still in the grips of the coronavirus pandemic. Like so many others, we’ve been working from home, trying to remember what day it is, and feeling nostalgic for those simpler times when “zooming” was more closely associated with cars and cameras. Currently, there is no definitive timetable for a return to normalcy, and the consensus is that whatever comes next will be different from what was. One prediction that seems fairly reliable, though, is that videoconferences will play a larger role than ever in how organizations function. So, please do not view this report as a short-term “pandemic survival guide.” The recommendations that follow are for the present and well beyond.

Defining Key Terms

After survey respondents answered general questions about videoconferences (which we referred to as “web-based convenings”), we asked them to answer more detailed questions about the specific categories of videoconferences that they attended most frequently. We defined those categories as follows:

Web Meetings

Staff, board, department head, community or other formerly in-person meetings that are now being conducted via videoconferencing platforms. Web meetings are primarily for information sharing, discussion and decision-making, and the emphasis is on interaction throughout among all participants. Because of this emphasis, web meetings tend to be smaller: 90% of survey respondents said that if the intent is to promote participation, the maximum number of attendees should be 20 or fewer. Slides or other forms of document sharing may or may not be used.

Among our survey respondents, web meetings were the most common category of online convenings: 95% reported attending them frequently.

Webinars

Like its name (a contraction of “web” and “seminar”), webinars are primarily for training, teaching or otherwise providing information (e.g., presentations, academic classes.) Webinars are predominantly a one-way flow of information, usually featuring one speaker (or a panel), frequently using slides or other forms of document sharing, and providing time for Q&A or other interactions. Webinars tend to be larger gatherings when compared to web meetings. Over half of our survey respondents said that even if the goal of the webinar is to keep everyone engaged and learning, they would place no limit on the number of attendees.

69% of respondents reported attending webinars frequently.

Webcasts

These online gatherings consistently number in the hundreds or even thousands (e.g., keynote speeches, TED Talks, performances.) The content is primarily a one-way delivery from a speaker, panel, or performer with much more limited opportunities for interaction due to the number of participants.

Webcasts were the least commonly attended category of online convenings: only 25% reported attending frequently.

Please note: Large-scale “web conferences” or other multi-day events may feel like separate categories entirely, but based on our qualitative research, we came to the conclusion that they are usually comprised of the three major categories outlined above (e.g., keynote speech = webcast; concurrent workshop = webinar; small briefings = web meetings).

ENGAGEMENT AND PARTICIPATION

The adventure begins here.

Keeping people focused and actively participating is your first and foremost challenge. There are plenty of tools and techniques to help you do both.

The challenges we first spotted in our [report](#), “Dialing In, Logging On, Nodding Off,” are still with us. Back in 2009, we asked public interest professionals to list the most common problems arising during their conference calls, videoconferences, and webinars. “Lack of participation” was cited first or second across the board. While both hardware and software for virtual meetings have evolved steadily since then, one thing remains constant: Keeping people focused and engaged is still the most challenging task we face.

Nearly half of the respondents (47%) admitted multitasking frequently or always during web meetings, and more than half were in that range during webinars (58%) and webcasts (57%).

[FROM THE SURVEY]

HOW OFTEN DO YOU FIND YOURSELF MULTI-TASKING DURING:

| | NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
|--------------|-------|--------|-----------|------------|--------|
| WEB MEETINGS | 1% | 13% | 40% | 38% | 9% |
| WEBINARS | 1% | 7% | 34% | 45% | 13% |
| WEBCASTS | 1% | 7% | 35% | 41% | 16% |

Please note: of the 4,405 people who took the survey, fewer than 650 (or less than 15%) responded to questions about webcasts, so those results throughout this report may be less representative than other categories.

When asked to list the qualities that make online convenings a positive experience, “engaging presentation” was the most common response, cited by nearly half of all respondents. And when asked to list the factors that make an online convening a *negative* experience, “Lack of engagement” was the second most common response.

It’s also worth noting that the third most desired quality was “using platform tools to promote interaction,” which speaks to *how* greater engagement may be achieved.

POSITIVE EXPERIENCE

| | |
|---|-----|
| ENGAGING PRESENTATION/FACILITATION | 45% |
| DESIGNING AND FOLLOWING A CLEAR STRUCTURE | 37% |
| USING PLATFORM TOOLS TO PROMOTE INTERACTION | 31% |

NEGATIVE EXPERIENCE

| | |
|--------------------|-----|
| TECHNICAL PROBLEMS | 20% |
| LACK OF ENGAGEMENT | 17% |
| TOO LONG | 15% |
| NO STRUCTURE | 15% |
| POOR FACILITATION | 15% |

The data also shows that people bring different expectations for how actively they will participate depending on the category of convening they are attending. When asked, “As a participant in *web meetings*, how often do you prefer to observe silently and otherwise not interact with the speaker or other participants?” only 19% of respondents said frequently or always. But when asked the same question about *webinars*, that number grew to 64%.

“Observing silently and not interacting with the speaker” does not necessarily mean that an individual isn’t engaged – in fact, they could be completely enthralled – but it does make it more difficult for speakers or facilitators to know if they are genuinely connecting. So, knowing that most people *want* to be engaged but may not be sending signals to that effect, what do you do?

RECOMMENDATIONS

Begin at the beginning.

The opening minutes of any videoconference are crucial in setting expectations. When you know from experience there will be latecomers and you’ll have to delay the start, give the people who showed up on time something interesting to do. For Goodman Center webinars, we always show a series of slides entitled “Points to Ponder” so the on-timers can learn more about the day’s subject matter while waiting for the rest of the class to arrive.

These first few minutes can also provide an opportunity to welcome people as they arrive and add a personal touch to what can be a very impersonal medium. As one of our survey respondents put it, “Allowing time for personal conversation and not just jumping right into the agenda creates a sense of connectivity that may be missing from video-based meetings.” Icebreakers, flash polls, and games can also be useful, especially when they are germane to the content and don’t come across simply as time-fillers.

If you don’t fill this time purposefully and your message to punctual participants is some version of, “Hang in there, we’re just waiting on a few more people,” (which we’ve heard more times than we care to count), then what you’re actually saying is, “Let the multitasking begin.” The data is clear: A large percentage of your audience will be tempted to do this anyway, so try not to give them an excuse to split their attention before you’ve even begun.



FIRST THINGS FIRST

“They may be obliged to attend, but that doesn’t mean they’ll be paying attention. First impressions are important, so we need to get it right from the beginning.”

Wissem Heni, Natural Resource Governance Institute

Let participants decide if their cameras will be on or off.

Survey respondents who prefer to keep their cameras on during online convenings offered good reasons to do so, first among them being “It makes me feel less isolated and more part of the group.” So, if you’re striving for greater engagement and participation, asking everyone to leave their cameras on seems like the right move.

Or does it? As you’ll see in Takeaway #7, there is a very sharp divide among respondents when it comes to personal video feeds. Participants who prefer to keep their cameras *off* also offered convincing reasons, first among those being “Prefer not to worry about my appearance/dress/background.” Consequently, if telling everyone to leave their cameras on would alienate half the participants, you could lose the battle for engagement right there.

Certainly, there will be occasions where extenuating circumstances (e.g., slow Internet speeds) will make the decision for you, but as a general rule, we recommend letting participants make the choice that makes *them* most comfortable.

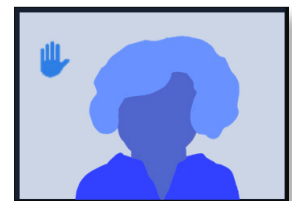
Use the chat box for more than just chat.

Given a choice of techniques and tools to create more engaging and interactive online convenings, survey respondents ranked “creative use of the chat box” first among all tools available. While most speakers or facilitators use the chat box strictly for questions and comments, it can also be used to:

- share links to videos, documents or other materials relevant to the convening
- conduct snap surveys (usually requiring a one or two-word answer)
- post footnotes or citations (instead of cluttering PowerPoint slides with fine print)
- read the room (explicitly asking questions such as, “Was that clear?”)

Stop and take questions frequently.

In the research for our book, [Why Bad Presentations Happen to Good Causes](#), we learned that most people can absorb a nonstop download of information for approximately 15-20 minutes before their eyes start to glaze over – and that was for in-person presentations. Given how long remote workers must stare at computer screens all day, the “pre-glaze” time span during virtual convenings may be even shorter.



Breaking up the one-way flow of information with frequent stops for questions and comments is another good way to keep people engaged. Not only can it allow other voices to be heard (relieving the monotony of a solo speaker), it also allows meeting leaders to provide answers in a timelier manner. If you’ve ever asked a question via the chat box and then watched minutes tick by before it was addressed, you know how distracting and frustrating that can be.

And be mindful of the fact that *how* people prefer to ask questions may depend on the kind of convening they are attending. For *meetings*, 50% of respondents said they prefer to ask questions out loud frequently or always, but for *webinars*, 51% had the exact opposite response, preferring to rarely or never unmute and ask questions themselves.

[FROM THE SURVEY]

HOW OFTEN DO YOU PREFER ASKING QUESTIONS OUT LOUD AS OPPOSED TO ENTERING ALL QUESTIONS IN A CHAT OR Q&A BOX?

| | NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
|---------------------|-------|--------|-----------|------------|--------|
| WEB MEETINGS | 2% | 10% | 39% | 40% | 10% |
| WEBINARS | 14% | 37% | 32% | 12% | 4% |

(Because webcasts usually confine questions to the chat box – if they take questions at all – we did not survey respondents for this category.)

Call on people.

Leaders of web meetings or webinars are often reluctant to call on participants for fear of embarrassing them, and that's a reasonable concern. But there are ways to call on people that aren't too intimidating for the person called on and let everyone else know, "Pay attention: you may be next." During Goodman Center webinars, we try to avoid asking factual questions that can be answered incorrectly as this can be embarrassing and have a chilling effect on other participants' desire to speak up. Instead, we look for opportunities to ask people for their opinions (which, by definition, cannot be wrong); have them participate in short, fun role-plays (an invitation they are free to decline); or before we share a specific statistic, ask them to take their best guess, because even if it's way off, we've already acknowledged that it's only a guess.

(We should also note that prior to our webinars, we email participants to ask them about their learning styles and give them the option to opt-out from being called on.)

More speakers, shorter speaking times.

In the same way that taking questions brings in more voices and breaks up aural monotony, having a panel of speakers, interviewing guest experts, and keeping it short can enhance engagement throughout your convening. Fortunately, our survey indicates this is already happening frequently or always in web meetings (62% of the time), webinars (65%), and webcasts (52%).

[FROM THE SURVEY]

HOW OFTEN DID THE LEADER/FACILITATOR SHARE SPEAKING RESPONSIBILITY WITH OTHERS (E.G., GUEST SPEAKERS, INTERVIEWEES) DURING:

| | NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
|---------------------|-------|--------|-----------|------------|--------|
| WEB MEETINGS | 1% | 6% | 31% | 52% | 10% |
| WEBINARS | 1% | 6% | 28% | 54% | 11% |
| WEBCASTS | 3% | 6% | 37% | 46% | 6% |

Use *all* the tools.

Breakout rooms, polls (both those embedded within the platforms and available from separate services such as Poll Everywhere), and whiteboards also received multiple mentions in our survey, and we recommend you try them all. Keeping people focused and engaged is truly a minute-by-minute battle. Anything you can do to break up the tedium of the medium will be appreciated.

INCLUSIVITY

Our virtual welcome mats need some work.

While attention is being paid to making online convenings more inclusive, there is plenty of room for improvement, particularly where accessibility is concerned.

Creating an inclusive workspace in which everyone present feels not only welcome but valued can be challenging under the best of circumstances. Take away the opportunities that come naturally when meeting in person – having a one-on-one chat, reading body language, or sensing a group’s energy level – and it can feel impossible. This sentiment was expressed repeatedly in both our survey and interviews by people responsible for leading and facilitating videoconferences.

Without question, fostering inclusion is tougher online, but some of the things we do in person can easily be adapted to virtual environments. Instead of greeting people at the door, we can welcome them by name as they log into the meeting. Using community agreements to set a meeting’s agenda and ground rules can work as well online as it does in person. Using the first few minutes of a convening to create an inclusive space is something anyone can do frequently, if not always, but according to our survey, it’s still a “sometimes” thing (and leaning more towards rarely or never than the other direction.)



THESE ARE A FEW OF MY LEAST FAVORITE THINGS

“Being talked at for a long time, not feeling like my feedback or opinions are valued in the space, others making assumptions about how I am coming into this space.”

Survey Respondent

[FROM THE SURVEY]

HOW OFTEN HAVE YOU SEEN CONVENING LEADERS OR FACILITATORS SAY OR DO THINGS SPECIFICALLY TO CREATE AN INCLUSIVE SPACE THAT ACKNOWLEDGES AND ADJUSTS FOR THE DIVERSITY OF ALL PARTICIPANTS?

| NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
|-------|--------|-----------|------------|--------|
| 6% | 33% | 43% | 17% | 2% |

When we asked respondents to describe the ways in which they have seen convening leaders work to create an inclusive space, the three most common replies were moderating techniques, use of platform tools, and displaying empathy.

Moderating Techniques

(mentioned by 27% of all respondents)

Verbatim comments from respondents included:

- “Call on quieter participants and invite them to speak.”
- “Acknowledging that participants may be engaging in different ways and that is okay.”
- “I have seen facilitators set clear expectations for the discussion at hand; provide explicit instructions on how participants should frame or respond to questions and prompts (e.g., use “I” statements for example instead of generalizations.)”

Use of Platform Tools

(26%)

Verbatim comments from respondents included:

- “Using ‘chat storms’ so everyone can contribute quickly.”
- “Periodic reminders to participants on how to indicate that they have something to say.”
- “Asking everyone to put their cameras on so that people feel part of a group.”
- “Let everyone know that cameos from family members/pets and periodically turning off camera is a completely acceptable and inevitable thing.”
- “Using breakout rooms to allow more people to participate actively.”

Displaying Empathy

(25%)

Verbatim comments from respondents included:

- “Mentioning if aspects of the presentation might be triggering for some.”
- “Accommodating children and pets interrupting with humor and grace.”
- “Recognizing the struggle and additional stress that staff members who are people of color may be experiencing and asking them to honor that and to be open to sharing how work colleagues can support.”

Also receiving significant multiple mentions: opening with icebreakers, acknowledging meetings are taking place on indigenous lands, and asking people to include their preferred pronouns along with their names. (In fact, “pronouns” was a top keyword and was deemed “important” by respondents 20-39 years old and of “some importance” by respondents 40-49 years old.)

For those still searching for ways to foster inclusivity, all of the verbatim comments above provide a rich menu to choose from. But the survey also provided a caveat: If you decide to incorporate one or more of these techniques, try to be mindful of the time they take. There was a fairly even split among respondents between those who recognized the need to start meetings with activities like these, and those who wanted to get to the agenda items as quickly and efficiently as possible.

For some of the participants in your online convenings, inclusivity begins with **accessibility**. Any individual who cannot sufficiently see or hear what is being shown or said right from the start, or who cannot understand the content due to learning issues or lack of fluency in a particular language, will not be able to participate in a meaningful way.

The good news is that there are plenty of options available for anyone wishing to create more accessible online convenings. Platforms such as Zoom, Microsoft Teams, Google Meet and others have sections on their websites that showcase tools such as screen magnifiers, high contrast mode, and how to provide recordings with full text transcripts. The bad news is that we're not using these tools nearly enough. When only 12% of respondents report that they observe webinar or webcast leaders frequently or always taking steps to create greater accessibility – *and that's the highest score across all categories of convenings* – clearly, we are not prioritizing these activities.

[FROM THE SURVEY]

HOW OFTEN HAVE YOU SEEN CONVENING LEADERS OR FACILITATORS CREATE GREATER ACCESSIBILITY FOR THE CONTENT (E.G., CLOSED CAPTIONING, LANGUAGE TRANSLATION) FOR:

| | NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
|----------------|-------|--------|-----------|------------|--------|
| ALL CONVENINGS | 43% | 38% | 15% | 4% | 1% |
| WEB MEETINGS | 34% | 41% | 16% | 7% | 2% |
| WEBINARS | 24% | 37% | 18% | 9% | 3% |
| WEBCASTS | 22% | 41% | 25% | 10% | 2% |

IF YOU ANSWERED SOMETIMES, FREQUENTLY OR ALWAYS, PLEASE BRIEFLY DESCRIBE THE WAYS IN WHICH YOU HAVE SEEN FACILITATORS OR LEADERS CREATE GREATER ACCESSIBILITY:

| | ALL CONVENINGS * | WEB MEETINGS | WEBINARS | WEBCASTS |
|---------------------------|------------------|--------------|----------|----------|
| CLOSED CAPTIONS/SUBTITLES | 57% | 31% | 50% | 57% |
| AMERICAN SIGN LANGUAGE | 19% | 8% | 6% | 4% |
| SIMULTANEOUS TRANSLATION | 18% | 6% | 9% | 19% |

* Also receiving significant multiple mentions: Explaining visuals for participants with impaired vision or who joined without visuals (e.g., by phone.)

To the extent that tools for accessibility are being employed, closed captions are used most frequently, but be advised there were many comments in the survey about the unreliability of transcriptions in some closed captioning services.

RECOMMENDATIONS

The tools that your platform makes available will vary depending on the level of service to which you have subscribed. So, if you haven't done so already, take the time to learn your options. Enhancing accessibility doesn't have to end there, though. PowerPoint can increase accessibility when slides are part of your convening. Thanks to recent improvements by Microsoft, you can now set up your PowerPoint presentations to provide real-time subtitles for the speaker's narration in either the speaker's language or translated into any of 70 other languages. (And if you have access to PowerPoint Live Presentation, each audience member can have the narration translated into the language of their choice.)



When setting up a Slide Show, select "Subtitle Settings" to find a choice of 70 languages into which your live narration can be translated and displayed on screen.

Finally, U.S. government agencies are required by Section 508 of the Rehabilitation Act to ensure that communication materials such as PowerPoint slides are fully accessible to people with disabilities. Guidelines on text, object and color formatting, and other design aspects can be found on the website Section508.gov. And even if you don't work for the government, these are useful standards for evaluating the accessibility of your slides.

LEADERSHIP AND FACILITATION

Get training. Get some help. And get better at the basics.

Leading and facilitating online is hard enough as it is. Learning by doing and trying to do it all yourself are not recipes for success.

TRAINING

Webinars were relatively new when we conducted our research in 2009, but the lack of training for webinar leaders back then was still eye-popping: 72% of respondents who were leading or facilitating webinars reported having no training whatsoever. We expected to see improvement in this category after eleven years, and we did: only 37% of respondents said they had no training to lead webinars, but even that number is disappointing considering how much time we're currently investing in them, both as individuals and organizations. Shouldn't we expect more professionalism by now?

The data on web meetings is also concerning: nearly half (48%) of respondents who regularly lead online meetings reported having no training in how to do so. This is not entirely unexpected: As work-places closed due to the pandemic – often with short notice – organizations everywhere had to adjust quickly, and moving meetings to the web was one of those on-the-fly adjustments. So, excusing a lack of training because “we’re building the plane as we’re flying it” seemed reasonable, but our survey was administered five months into these unscheduled “flights.” Is it unreasonable to assume that more organizations could have prioritized this kind of training by now?

[FROM THE SURVEY]

HOW WOULD YOU DESCRIBE THE TRAINING YOU HAVE HAD TO LEAD OR FACILITATE ONLINE CONVENINGS (CHECK ALL THAT APPLY)?

| | WEB MEETINGS | WEBINARS | WEBCASTS |
|--------------------------------|--------------|----------|----------|
| EMPLOYER PROVIDED TRAINING | 13% | 15% | 12% |
| ENROLLED IN TRAINING ON MY OWN | 17% | 25% | 22% |
| READ ABOUT BEST PRACTICES | 46% | 60% | 60% |
| STUDIED OTHER PRESENTERS | 51% | 64% | 65% |
| NO TRAINING | 48% | 37% | 35% |

* Also receiving significant multiple mentions: Adapting skills from in-person leadership or facilitation experience.

RECOMMENDATIONS

Web meetings are already a permanent fixture for many organizations, and they will probably remain a frequent occurrence for organizations that started using videoconferences more often due to the pandemic. According to our survey, respondents who lead web meetings anticipate leading them more often in the months and years to come, so the need for training will only increase. There is no shortage of online courses to teach these skills (our class, [The Webinar on Webinars](#), among them), so we recommend individuals and organizations scan the various offerings and find the training best suited to their needs.

SHARING RESPONSIBILITIES

Drawing on interviews and our own experience from leading or facilitating online convenings, we identified seven challenges to leading a successful web meeting, webinar, or webcast (listed at right). We asked survey respondents to evaluate each challenge on a 1-5 scale where 1 indicated “not challenging at all” and 5 indicated “extremely challenging.”

“Paying attention to several simultaneous streams of information” was identified as the most significant challenge for both meetings and webinars and was a close second for webcasts (surpassed only by “keeping participants engaged.”)

CHALLENGES TO LEADING A SUCCESSFUL ONLINE CONVENING

(Rated on 1-5 scale where 1 = not challenging and 5 = extremely challenging)

| | MEETINGS | WEBINARS | WEBCASTS |
|--|----------|----------|----------|
| Having enough time to prepare content | 2.4 | 3.0 | 3.0 |
| Keeping participants engaged | 2.9 | 3.5 | 3.4 |
| Paying attention to several simultaneous streams of information | 3.1 | 3.5 | 3.3 |
| Ensuring participants know how to use all the platform's tools | 2.8 | 3.1 | 2.9 |
| Dealing with participants who talk or chat excessively | 2.7 | 2.6 | 2.5 |
| Dealing with technical problems | 2.9 | 3.3 | 3.1 |
| Knowing how to “read the room” | 3.0 | 3.3 | 3.0 |

Fortunately, most respondents who regularly lead or facilitate online convenings are already meeting this challenge by assembling teams to help them. We heard during several of our interviews that, in the best cases, these teams consisted of three people: a convening host, who was responsible for delivering the content and interacting with participants; a chat box monitor, who could answer questions directly or relay them to the host; and a technical specialist who could deal with any platform issues encountered by the host or participants.

RECOMMENDATIONS

Leading and facilitating groups of humans online is hard enough as it is – you shouldn’t have to go it alone. If you have no alternative, we recommend minimizing the chat box or turning it off temporarily so you can concentrate fully on the material you’re presenting or a conversation in progress. Let participants know in advance that you will be stopping periodically to catch up with questions or comments in the chat box and that you appreciate their patience in the interim. Admittedly, this is not an ideal scenario, but people will usually cut you some slack when you tell them explicitly that this is all in service of being fully present.

If you can assemble a team as described above, we strongly encourage you to do so. Even a two-person team (which we regularly use for Goodman Center webinars) can provide a more satisfying experience for both convening leaders and participants.

As noted above, there is already a strong trend in this direction: When asked “How often did the convening’s leader/facilitator share logistical responsibilities (e.g., monitoring questions in the chat box, handling technical issues),” 56% of respondents answered frequently or always for meetings, 68% answered frequently or always for webinars, and 54% answered in the same high range for webcasts. That data is encouraging, but we believe that the team approach is so fundamental to more engaging and productive experiences that the numbers should be higher.

ATTENDING TO THE BASICS

When thinking about the minimum daily adult requirements for running a successful online convening, “providing sufficient instruction on how to use the videoconferencing platform’s various tools” should be first on the list. Of course, if you’re working with a group that uses the same platform day in and day out, feel free to skip the instructions and get right into the content. But if your participants may have a wide range of proficiency with the platform and you don’t take even a minute or two to familiarize them with the basics – muting, turning cameras on and off, using the chat box, etc. – you’re inviting trouble.

Our survey indicates there is a plenty of room for improvement here. If you agree that this responsibility of leadership/facilitation belongs in the frequently-to-always range (again, with the only exception being for convenings comprised entirely of experienced users), then the results below – where more than half of all respondents across the board are not covering this base consistently – are simply not acceptable.

[FROM THE SURVEY]

HOW OFTEN DID THE ONLINE CONVENING’S LEADER/FACILITATOR PROVIDE SUFFICIENT INSTRUCTION ON HOW TO USE THE VIDEOCONFERENCING PLATFORM’S VARIOUS TOOLS (E.G., MUTING/UNMUTING, ASKING QUESTIONS, PARTICIPATING IN POLLS)?

| | NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
|--------------|-------|--------|-----------|------------|--------|
| WEB MEETINGS | 4% | 22% | 37% | 31% | 6% |
| WEBINARS | 3% | 17% | 37% | 34% | 8% |
| WEBCASTS | 9% | 24% | 38% | 25% | 3% |

RECOMMENDATIONS

Tools differ from platform to platform, rules differ among organizations, and both may differ depending on whether it’s a meeting, webinar or webcast. Whether you, as leader or facilitator, cover how platform tools will be used, or if you use community agreements to establish them, do not skip this step at the beginning of your convenings. Ensuring that everyone knows how to participate to the fullest is not optional.

STRUCTURE

More time online requires more attention to structure.

As remote workers log more hours in videoconferences every day, their expectations that meeting and webinar leaders will make good use of their time are rising. Clear, concise agendas help meet those expectations.

When asked what makes a web meeting a positive experience – an open-ended question for which survey-takers could say anything – the most common response by far was “a clear agenda” (52% of all respondents.) The flip side of this question yielded a corresponding response: When asked what makes web meetings a *negative* experience, the most common response was “no structure.” One respondent who spoke for many said, “Folks don’t seem to PREPARE for meetings, they just show up and assume an entirely unstructured conversation will lead to clear consensus on select topics. It doesn’t.”

Certainly, there are times when a freewheeling exchange is the right approach, but as a general rule, a carefully prepared agenda will serve you best. In fact, it can be as crucial to the success of a meeting as a strategic plan can be in contributing to the long-term success of an organization: Both should tell you where you’re going, how you’re going to get there, and who will be doing what along the way. With the possible exceptions of very brief or very small convenings, we believe agendas should be considered another “minimum daily adult requirement” for *all* meetings and webinars.

Translating that conviction into survey data means that responses to the question, “How often did the online convening leader/facilitator provide an agenda?” should fall largely in the frequently-to-always range. Unfortunately, they don’t. For web meetings, respondents report receiving agendas sometimes or even less frequently 44% of the time. For webinars, agendas were a sometimes thing more than half the time (54%). We can and should do better.

[FROM THE SURVEY]

HOW OFTEN DID THE ONLINE CONVENING LEADER/FACILITATOR PROVIDE AN AGENDA (EITHER IN ADVANCE OF THE MEETING OR AT THE BEGINNING) THAT GAVE THE PARTICIPANTS A CLEAR OUTLINE OF CONTENT?

| | NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
|--------------|-------|--------|-----------|------------|--------|
| WEB MEETINGS | 1% | 9% | 34% | 48% | 7% |
| WEBINARS | 3% | 17% | 34% | 37% | 9% |

(Because agendas are usually not as essential in webcasts, we did not survey respondents for this category.)

RECOMMENDATIONS

An agenda should be more than just a list of topics. Done well, agendas can:

- **Establish purpose.** At the top of every agenda should stand a clear and concise statement of the meeting's objective (or for webinars, what participants should expect to learn). If you cannot state the purpose and desired outcomes in a single sentence, you're probably not ready to call the meeting.
- **Designate and prepare participants.** Have you ever attended a meeting where, once the objective was made clear, it was embarrassingly evident that key people were absent? An agenda that includes the objective and a full list of invited participants and that is distributed in advance helps avoid this awkward, time-wasting problem. In addition, identifying any individuals who will lead specific segments during the meeting also helps ensure they will adequately prepare.
- **Organize content.** After you're clear on your objectives and who needs to be in the meeting to accomplish them, then it's time to list the topics that will be covered. If possible, list the amount of time that will be devoted to each topic: this can help set expectations for participants and may also help convening planners ensure that the meeting or webinar stays within the time allotted.
- **Review rules of engagement.** Cameras on or off? Muted or unmuted? Questions in the chat box or asked out loud? And what if I have technical problems? These questions are so common, that they should be answered within a written agenda distributed in advance, and explicitly covered at the beginning of the meeting or webinar as the agenda is reviewed.

Agendas displayed on slides during a web meeting or webinar can also be designed to track progress, visually reinforcing structure throughout the convening. Consider the agenda slide in **Figure 1** which was part of a deck prepared by Get2College, a program of the Woodward Hines Education Foundation. The slide reappears every time a new section of the meeting begins, but changes in its design show participants what's already been covered, what's about to be discussed, and what still lays ahead. The three bars on the left border of the slide also provide structural information, in this case signaling that we are in the middle of a three-part presentation.

When the people in our meetings and webinars are scattered around the country (if not the world), when many are working at home and battling the distractions that come with that locale, when we cannot see or hear some of the people we're trying to collaborate with in real time, is it any wonder that our desire for some semblance of order is heightened? An agenda, no matter how well prepared, will not solve all these problems, but the absence of one will definitely let them fester.

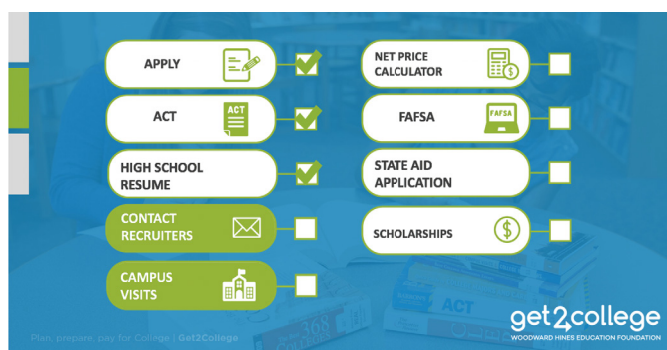


Figure 1

LENGTH AND FREQUENCY

Shorter and fewer, please.

The mental and physical wear-and-tear of meeting online coupled with the increase in meetings per day argue for shorter durations and fewer meetings.

“A rose is a rose is a rose,” wrote Gertrude Stein, poetically implying that things are what they are. A few hours on Zoom would probably have changed her mind. The meeting that you convene online is not the same thing as the meeting you convene in person. Not only was this confirmed by our survey, we heard this in our interviews with people from all over the globe. “This is something we learned,” said Niamh Farren of the Centre for Effective Services in Ireland. “It’s just not the same as in-person meetings.”

Remote workers are spending more time than ever staring at screens and don’t want to spend a minute more than is absolutely required. So be prepared to make adjustments, especially where length and frequency are concerned.

[FROM THE SURVEY]

OVER THE COURSE OF A TYPICAL WORK WEEK NOW (I.E., WORKING REMOTELY), WHAT IS THE TOTAL NUMBER OF HOURS YOU ARE SPENDING IN WORK RELATED WEB-BASED CONVENINGS?

| ZERO | 1-5 | 6-10 | 11-20 | 21-30 | 31-40 | 40+ |
|------|-----|------|-------|-------|-------|-----|
| 1% | 22% | 32% | 27% | 13% | 3% | 1% |

TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT: IF A WEB-BASED CONVENING HAS A SKILLED FACILITATOR, OFFERS ACTIVITIES THAT SUCCESSFULLY ENGAGE PARTICIPANTS, AND INCLUDES REGULAR AND SUBSTANTIAL BREAKS, I CAN REMAIN FOCUSED AND PRODUCTIVE FOR ANY LENGTH OF TIME UP TO AND INCLUDING 8 HOURS.

| STRONGLY AGREE | AGREE | NEUTRAL | DISAGREE | STRONGLY DISAGREE |
|----------------|-------|---------|----------|-------------------|
| 10% | 44% | 1% | 36% | 10% |

IF YOU DISAGREED OR STRONGLY DISAGREED WITH THE STATEMENT ABOVE, WHAT IS THE TOTAL NUMBER OF HOURS YOU CAN PARTICIPATE IN WEB-BASED CONVENINGS IN A SINGLE DAY AND STILL FEEL FOCUSED AND PRODUCTIVE?

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|----|-----|-----|-----|----|----|-----|
| 3% | 20% | 32% | 35% | 7% | 2% | .3% |

Nearly 60% of respondents reported spending between 6 and 20 hours per week in online convenings. When asked if, under favorable circumstances, they could remain focused and productive during a full day (i.e., 8 hours) of videoconferences, there was a clear split, with 54% agreeing or strongly agreeing and 46% disagreeing or strongly disagreeing. For those who disagreed, 87% said they felt that the optimum amount of time they could spend online in a given day was between 2-4 hours.

When asked what would be the ideal length of an online convening – whether it was a web meeting, webinar, or webcast – the sweet spot appears to be 60 minutes or less. Along the same lines, when asked what makes web meetings, webinars or webcasts a positive experience, “brevity” appeared among the top five responses in every category.



[FROM THE SURVEY]

WHAT AMOUNT OF TIME DO YOU FEEL WOULD BE THE IDEAL LENGTH FOR A:

WEB MEETING

| | |
|--------------------|-----|
| 30 MINUTES OR LESS | 22% |
| 31-60 MINUTES | 67% |
| 61-90 MINUTES | 10% |
| 91-120 MINUTES | 1% |
| 2-3 HOURS | - |
| 4 HOURS OR MORE | - |

WEBINAR

| | |
|--------------------|-----|
| 60 MINUTES OR LESS | 66% |
| 61-90 MINUTES | 30% |
| 91-120 MINUTES | 3% |
| 2-3 HOURS | 1% |
| 4 HOUR OR MORE | - |

WEBCAST

| | |
|--------------------|-----|
| 60 MINUTES OR LESS | 68% |
| 61-90 MINUTES | 25% |
| 91-120 MINUTES | 4% |
| 2-3 HOURS | 2% |
| 4-5 HOURS | .5% |
| 6 HOURS OR MORE | 0% |

WHAT SHOULD BE THE LONGEST SPAN OF TIME WITHOUT A BREAK TO ENSURE YOUR CONTINUING FOCUS AND ENGAGEMENT (REGARDLESS OF OVERALL LENGTH) FOR A:

WEB MEETING

| | |
|------------------|-----|
| 10-30 MINUTES | 6% |
| 31-60 MINUTES | 43% |
| 61-90 MINUTES | 42% |
| 91-120 MINUTES | 8% |
| MORE THAN 2 HRS. | 2% |

WEBINAR

| | |
|------------------|-----|
| 10-30 MINUTES | 8% |
| 31-60 MINUTES | 51% |
| 61-90 MINUTES | 36% |
| 91-120 MINUTES | 5% |
| MORE THAN 2 HRS. | 1% |

WEBCAST

| | |
|------------------|-----|
| 10-30 MINUTES | 12% |
| 31-60 MINUTES | 51% |
| 61-90 MINUTES | 33% |
| 91-120 MINUTES | 4% |
| MORE THAN 2 HRS. | 0% |

RECOMMENDATIONS

Without question, a primary consideration in planning the length of a given web meeting, webinar or webcast should be the amount of content that must be covered. If the subject matter absolutely requires convening for more than an hour, so be it. But be sure to divide the convening into 60 or 90-minute blocks with breaks in between – that’s how long more than 80% of your participants can remain focused and engaged over a given stretch.

That said, if there’s any aspect of the meeting that can be shortened or replaced with an offline conversation, get it off the agenda. “Our in-person board meetings often went for 2 hours,” one survey respondent wrote. “Now we keep web board meetings to 90 minutes because everyone gets tired.” And keep in mind that not every virtual meeting has to be face to face. When we asked, “How often do you feel that a web meeting could have been conducted just as effectively (or even more effectively) via telephone or other audio-only format?” 65% of respondents answered sometimes, frequently or always.

PREFERRED PLATFORMS

It's Zoom's world. We're just working in it.

Microsoft, Google, Cisco and other tech giants are becoming more competitive every day, but for now, Zoom is the top choice for all categories of online convenings.

While the name Zoom is often followed by the word “fatigue,” survey respondents do not appear tired of choosing this platform when they have to work remotely. Given a choice of 18 of the most popular videoconferencing platforms (listed at right) as well as an option to name a service not listed, Zoom was far and away the top choice in all categories. Zoom was also the highest rated in terms of user satisfaction among the top five choices in each category.

BIG BLUE BUTTON
BLUE JEANS MEETINGS
CLICK MEETING
FACEBOOK LIVE
FREE CONFERENCE
GOOGLE MEET
GOTOWEBINAR
JABBER
JOIN.ME

MICROSOFT TEAMS
READYTALK
RING CENTRAL
SKYPE
SLACK
WEBEX
YOUTUBE
ZOHO MEETINGS
ZOOM

Respondents were asked to select up to five platforms that they use most often, and to rate their satisfaction with each (1 equals poor, 5 equals excellent). Here are the breakdowns across all categories.

[FROM THE SURVEY]

| CATEGORY | PLATFORMS (LISTED IN ORDER OF USAGE) | USE MOST OFTEN | SATISFACTION (1-5 SCALE) |
|----------------|--------------------------------------|----------------|--------------------------|
| ALL CONVENINGS | ZOOM | 97% | 4.02 |
| | MICROSOFT TEAMS | 43% | 3.41 |
| | GOTOWEBINAR | 36% | 3.40 |
| | WEBEX | 31% | 3.30 |
| | GOOGLE MEET | 29% | 3.18 |
| WEB MEETINGS | ZOOM | 91% | 4.18 |
| | MICROSOFT TEAMS | 34% | 3.67 |
| | GOOGLE MEET | 19% | 3.48 |
| | WEBEX | 15% | 3.54 |
| | GOTOWEBINAR | 12% | 3.64 |
| WEBINARS | ZOOM | 86% | 3.95 |
| | GOTOWEBINAR | 48% | 3.55 |
| | WEBEX | 34% | 3.38 |
| | MICROSOFT TEAMS | 12% | 3.46 |
| | FACEBOOK LIVE | 7% | 3.12 |
| WEBCASTS | ZOOM | 75% | 3.83 |
| | YOUTUBE | 34% | 3.65 |
| | GOTOWEBINAR | 33% | 3.44 |
| | WEBEX | 28% | 3.46 |
| | FACEBOOK LIVE | 22% | 3.09 |

The dominance of Zoom, Microsoft Teams, Webex and GoToWebinar is clear, with only Facebook Live and YouTube cracking the top five in any category.

RECOMMENDATIONS

Full disclosure: The Goodman Center started using Zoom about two years ago (after more than ten years on ReadyTalk), and like the vast majority of respondents to the survey, we remain satisfied customers. If you are shopping around for a platform, the fact that so many people are already familiar with Zoom (not only from the professional uses we measured, but also from personal use) makes it easy for us to recommend. That said, we also recognize that videoconferencing technology is rapidly evolving, and that the platforms designed by Microsoft, Google, Cisco, Adobe and others are improving quickly to meet the ever-changing needs of remote workers.

One innovation that may prove to be a game-changer is “Together” mode for Microsoft Teams. Millions of sports fans got a first look at this technology during the 2020 NBA playoffs, where large courtside video screens showed what appeared to be rows of fans. Together mode can place the people in your online convening in a single setting such as rows of seats in a sports stadium or auditorium, or at a table in a conference room. As a result, rather than gawking at a bunch of boxes on your computer screen and feeling like you’re simultaneously watching 25 different TV shows, when you’re in Together mode, you have the more familiar (and less mentally taxing) perspective of looking at a group of people in one location.

By the time you read this, there may be other innovations that make one platform more suitable for you than another. So, we recommend you consider all your options, check out all the bells and whistles available, and find the platform that will work best for your organization.

PERSONAL VIDEO FEEDS

Q: Should I turn my camera on or off?

A: Yes!

The kind and size of your online convening can provide useful guidelines here, but whenever possible, let your participants decide for themselves.

There was a distinct split in our survey between those who wanted to keep their video feeds on and those who preferred having them off. The On-ers (not to be confused with a herd of judges) noted how it improves interpersonal communication and can contribute to a greater feeling of community. The Off-ers (team of assassins?) cited how distracting these videos can be and also how they can contribute to a loss of privacy.

When we spoke with Matt Claps of Casey Family Programs, he diplomatically captured both sides of this split. “It’s part of our culture to recognize we’re working in someone’s personal space, so we allow people to turn off cameras and mute,” he said during our Zoom interview. “But that does present a challenge of losing the nonverbal communication you usually have when you can see the person you’re speaking with.”

With valid arguments on both sides, how should online convening leaders and facilitators handle this choice? The category and size of your convening can offer some help. Since web meetings tend to be smaller gatherings and usually thrive on high levels of interaction among the participants, you may want to ask participants to leave their videos on. Our survey respondents agreed: 65% preferred having their videos on frequently or always, and only 9% preferred them on rarely or never during web meetings.

[FROM THE SURVEY]

IF YOU ARE ABLE TO JOIN VIA VIDEO, HOW OFTEN DO YOU PREFER HAVING YOUR VIDEO STREAM ON?

| | NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
|--------------|-------|--------|-----------|------------|--------|
| WEB MEETINGS | 2% | 7% | 26% | 44% | 21% |
| WEBINARS | 15% | 30% | 29% | 18% | 8% |

(Because webcasts frequently have a built-in mechanism that automatically turns off personal video feeds and does not allow individuals to turn them on, we did not survey respondents in this category.)

Given a choice of five reasons for preferring videos stay on (with the option to select all that applied and also to enter other reasons not listed), respondents prioritized their reasons as follows:

1. It makes it easier to interact and communicate (84%)
2. It helps me stay focused (60%)
3. If I see other videos on, it feels rude to have mine off (59%)
4. It makes me feel less isolated and more part of a group (57%)
5. It's required/requested by the facilitator (19%)

Respondents also noted:

- "As a leader in my organization I feel it's appropriate to demonstrate to others that I am 'present.'"
- "I want my supervisors to see that I'm engaged."

And our personal favorite:

- "You don't put a paper bag on your head when you meet in person."

Since webinars often involve larger groups, they would seem to function more smoothly with personal videos turned off, and respondents clearly leaned in this direction: Only 26% preferred them on frequently or always, and even more telling, 45% — five times the number of web meetings attendees — said they rarely or never leave their video on. Given a choice of four reasons for preferring to leave their video off (again with the option to select all that applied and also to enter other reasons not listed), respondents prioritized their reasons as follows:

1. Prefer not to worry about my appearance/attire/background (68%)
2. I'm distracted by my own video (36%)
3. It makes me self-conscious (35%)
4. It's physically uncomfortable to have to stay within the video frame (27%)

Nearly 40% of respondents who answered this question volunteered other reasons to add to this list, with "bandwidth issues," "concerns over privacy/security," "not wishing to be seen multi-tasking," and "no added value" leading the way.

RECOMMENDATIONS

This on/off debate should not be reduced to an either/or proposition. The data for web meetings strongly suggests these are occasions to ask everyone to turn their feeds on, just as the data for webinars indicates that a sizable part of your audience would prefer to leave them off for that kind of convening.



YOU CAN READ. GOT IT.

"Please give us something to look at besides another well-curated bookshelf."

Survey Respondent

At The Goodman Center, we strive to have the best of both worlds within a single convening. When we begin a webinar (which will usually involve 20-25 participants), we ask everyone to join with their videos *on* so we can welcome them and so they can see who else is attending. Once the class is underway and we begin teaching, we ask participants to turn their videos *off* so we can all focus on the content (which always involves PowerPoint slides). When we stop periodically for questions or discussion, we ask participants to turn their videos *on* again so everyone can see who's speaking.

Every request to turn video feeds on or off, however, comes with the option to decline. First and foremost, we believe that people work best and learn most when they feel comfortable and safe. In virtual settings, that feeling begins with how they want to be seen...or not.

In addition, be aware that race, gender, and age can also affect how individuals approach this decision.

- While 65% of all respondents prefer to keep their videos on during meetings, a noticeably smaller percentage of people of color (55%) expressed this preference during meetings.
- Men are more likely than women to prefer having video on during meetings by a small but statistically significant margin: 25% to 19%.
- Younger participants are much more likely to feel it's rude to have their videos off when others have them on: 77% for respondents 20-29 years old versus 49% for participants 60+.

Finally, we must all acknowledge the fact that participants in our meeting may be attending *many* online convenings in a given day and may simply tire of being "on camera." We noted many comments along these lines in our survey, and one in particular jumped out: "My boss makes us keep our video on. I'm on video 5-7 hours a day. It is exhausting. I hate looking at myself all day and fake smiling during Zoom meetings. My head hurts every day. Please make it stop."

The least we can do is offer people a choice.



EQUITY IN ACTION

"Equity is all about customization and tailoring. If we can offer opportunities in which our participants' whole selves are honored (including their video preferences), I see this as a tangible way to advance equity in virtual settings."

Jaser Alsharhan, Grantmakers for Effective Organizations

SLIDES

Less text, more action, and always build.

Design techniques that make in-person presentations more eye-catching are absolutely essential in an environment where it's so easy to look away.

Picture this: You're sitting in a hotel meeting room and suffering through a PowerPoint presentation with slides so dense with text and intricate graphics that they're basically unreadable from more than a foot away. You're bored to tears, but the presenter can see you, so you're probably thinking twice before pulling out your phone and checking your email. As Max Atkinson, an expert on public speaking and presenting, has rightly pointed out in his book, *Lend Me Your Ears*, eye contact is a subtle but effective form of pressure on an audience to pay attention.

When we present online, that kind of pressure can disappear. The video feeds of remote participants can give us some sense of their interest (assuming their cameras are on), but that distinctive we're-all-in-the-same-room kind of pressure you get from real eye contact just isn't there. Consequently, while there is more pressure on presenters to be engaging, their slides also have to work harder to capture and constantly refresh visual interest.

[FROM THE SURVEY]

WHEN PRESENTERS HAVE USED SLIDES, HOW OFTEN ARE THEY WELL-DESIGNED AND AN ENHANCEMENT TO THE EXPERIENCE?

| | NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
|--------------|-------|--------|-----------|------------|--------|
| WEB MEETINGS | 1% | 12% | 47% | 38% | 2% |
| WEBINARS | 0% | 9% | 44% | 44% | 3% |
| WEBCASTS | 0% | 6% | 44% | 47% | 2% |

The numbers above suggest we're making some progress where slide design is concerned, but when no category reaches even 50% in the frequently-to-always range for high quality design, there is clearly room for improvement.

RECOMMENDATIONS

If you want to up your slide design game in general, there is plenty of excellent advice in books by Nancy Duarte, Garr Reynolds, and other world-class designers. The four recommendations that follow, though, are specifically for slide presentations that will be delivered online as part of web meetings, webinars and webcasts.

Create different sets of slides for presenters and convening participants.

An excellent case in point is a presentation entitled, “Reaching Out Supporting Families” that was developed by the Centre for Effective Studies (CES) in Ireland. The text-heavy slide pictured in **Figure 2** was created for the presenter. It contains all the points she needed to cover for the section of the presentation entitled, “Creating a Safe Environment for Sharing.” The most important points, though, are contained in the six bulleted paragraphs on the right side of the slide.

All the information is valuable, but the slide is simply not interesting to look at, as presenters at CES were well aware. So, they designed another version of the slide (**Figure 3**) that visualizes the six bulleted points as brightly colored icons accompanied by a minimal amount of text. That slide appeared on screen during the webinar while the presenter used the original text-heavy slide as her script. As a follow-up to the presentation, CES distributed the presenter’s slides so participants could review the complete text.

Creating a safe environment for sharing

- The dynamic of peer support is very different from most people’s experience of treatments and professional interventions, where people are seen as needing help and staff are seen as providing help.
- Sharing experiences with other members is a challenge for some people. Power dynamics within and outside the peer support network mean people can have difficulties expressing their views, or to understand their experiences as valid.

Some ideas from the literature on how to create a safe environment:

- Ground rules and shared principles/ values that promote listening, respect, confidentiality, non-discrimination, being non-judgmental
- Keep all information and stories shared during meetings confidential, including, where requested, people’s participation in the group
- A facilitator may help to create a positive environment
- Training and education for both facilitators and peer support members
- The structure of the peer support network can influence how comfortable people are expressing themselves – some people will have an aversion to professionally led groups because of bad experiences and would have greater trust that a peer-led group is really in their interests
- Connecting over shared activities or interests can create a more comfortable environment and help trust to grow

C E S

Figure 2

Creating a safe environment for sharing

- Ground rules and shared values/principles
- Confidentiality
- Facilitation
- Training and education
- Shared activities
- Consider who leads peer support – peer/professional

Figure 3

Two words: always build.

When presenting slides where all the text or graphics can be seen at once – i.e., there are no animated elements – you put yourself at a disadvantage when it comes to holding the audience’s visual interest. Consider for example, the slide pictured here from a presentation on Latin American exports by the Natural Resource Governance Institute (**Figure 4**). The bar graph covers five different regions and five different manufacturing sectors within each region, so there’s a lot of valuable information to be discussed here.

Now, imagine you’re in the online audience as the presenter focuses on the bar labeled “America del Sur.” As she goes into detail about the sectors that comprise that bar, the chances are very good that your eyes are roaming elsewhere, because there’s plenty of other stuff to scan. There might be another region of greater interest to you, or you might speed-read the entire slide and, having done that, decide that this would be a good time to check your email while the presenter is still dutifully working her way from left to right. Multiply this experience by everyone else in the audience, and you have a presenter who could be talking mostly to herself.

On the other hand, had the slide appeared as it does in **Figure 5**, things might have gone differently. In this version, the bars have been animated to appear on command, so when the presenter is talking about America del Sur, that’s all the participants can see. Now she’s able to keep her audience focused on the information she’s discussing, and as she introduces each new bar, the motion on the screen can pull wandering eyes back to the subject at hand.

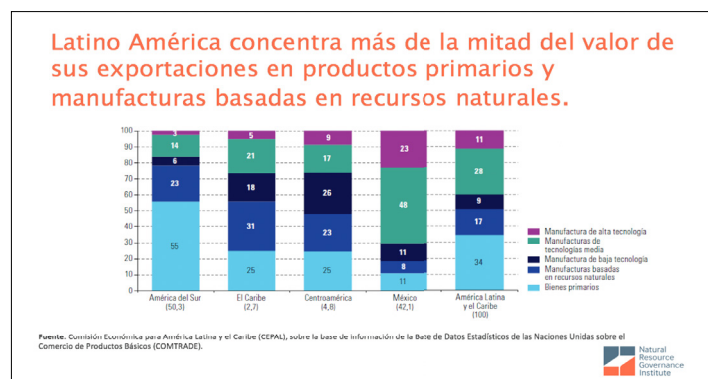


Figure 4

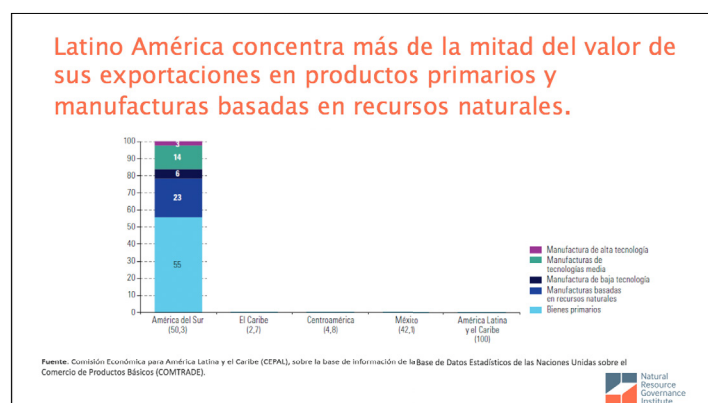


Figure 5

Keep it moving or you're doing radio.

In the same way that animations within a given slide can refresh visual interest, moving briskly from slide to slide is another way to keep your audience's attention. We do not prescribe an exact amount of time that each slide should be on screen or a specific total number of slides for a given hour, because there are too many variables from one presentation to another to deal in such absolutes.

But we will offer this warning: If a slide-driven presentation stalls on a single slide for too long, your online convening can start to resemble radio – i.e., there's nothing to look at, so everyone is just sitting and listening. And if radio has taught us anything, it's that we can listen with one ear and do something else – such as catching up on our email – at the same time.

You can run into a similar problem when interviewing guest experts or bringing in a panel of speakers. If they aren't using slides, then an interview or panel discussion can devolve into a series of talking heads, and over time that can be as interesting to look at as a static slide. So, we recommend pre-interviewing any guest experts prior to the convening to learn more about the material they intend to cover. Chances are you'll be able to find images related to their subject matter (e.g., the cover of their latest book, a photo of another expert they plan on citing, a map of a region they'll be talking about, etc.) that can be placed on slides and interspersed with the conversation as visual backdrops that keep the screen dynamic and changing.

And sometimes, stop showing slides.

Finally, another way to mix it up, visually-speaking, is to stop sharing your slides from time to time and give participants the opportunity to turn on their cameras and have a discussion. As noted above, this may not be quite as effective as in-person eye contact for increasing engagement and participation, but it's the closest thing we've got, and if it breaks up a long sequence of slide after slide after slide, it can help refresh visual interest, too.

LONG-TERM TRENDS

It ain't over when it's over.

Post pandemic, working remotely will play a significantly larger role in how organizations function than it did prior to the pandemic.

You have probably already seen articles predicting that the explosion in remote work triggered by the pandemic is only the beginning of a fundamental shift in how organizations will deploy staff long-term. A New York Times article entitled, "[What If Working From Home Goes on Forever?](#)" (June 9, 2020), reported that, "In the last month, several executives have announced sweeping plans to permanently increase the number of employees operating outside the office. At Facebook, Mark Zuckerberg has said he expects 50 percent of his work force to be doing their jobs remotely in as little as five years." Respondents to our survey have the same expectation.

[FROM THE SURVEY]

PRIOR TO ANY SHELTER-IN-PLACE RESTRICTIONS IN YOUR AREA, HOW OFTEN DID YOU WORK FROM HOME (OR OTHER WORKSPACE) RATHER THAN A CENTRALIZED WORKPLACE PROVIDED BY YOUR EMPLOYER?

| NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
|-------|--------|-----------|------------|--------|
| 23% | 38% | 19% | 11% | 8% |

DURING ANY SHELTER-IN-PLACE RESTRICTIONS IN YOUR AREA (POSSIBLY INCLUDING RIGHT NOW), HOW OFTEN DID YOU WORK/ARE YOU WORKING FROM HOME OR OTHER WORKSPACE NOT PROVIDED BY YOUR EMPLOYER?

| NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
|-------|--------|-----------|------------|--------|
| 3% | 3% | 4% | 14% | 76% |

WHEN YOU ARE ABLE TO RETURN TO AN EMPLOYER-PROVIDED WORKPLACE (OR IF YOU ARE ALREADY THERE), HOW OFTEN DO YOU ANTICIPATE WORKING FROM HOME OR OTHER WORKSPACE?

| NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
|-------|--------|-----------|------------|--------|
| 4% | 12% | 37% | 37% | 11% |

Prior to the announcement of any shelter-in-place restrictions, only 19% reported working from home frequently or always. That number ballooned to 90% during the pandemic, but what is even more striking is that 48% expect to remain at home (or in a workplace not provided by the employer) frequently or always when offices re-open. That's more than double those working at home pre-pandemic.

Respondents also anticipate that the weekly onslaught of web meetings, webinars and webcasts is going to continue at current levels and possibly increase. When we asked if they expected the number of these convenings to decrease, remain the same, or increase over the next 12 months (keeping in mind that they completed the survey in July and August 2020), 89% of respondents expected the volume of web meetings to remain the same or increase, with 85% making the same prediction for both webinars and webcasts.

RECOMMENDATIONS

Given the likelihood of more people working remotely and more time spent in videoconferences, employers need to pay close attention to what employees are saying about the quality of their remote workplaces and provide whatever resources they can to ensure their employees will be productive there.

[FROM THE SURVEY]

PLEASE RATE YOUR HOME OR OTHER WORKSPACE ON HOW CONDUCTIVE IT IS TO GETTING WORK DONE (E.G., AMOUNT OF SPACE, NOISE LEVEL, POTENTIAL DISTRACTIONS) WHERE 1 REPRESENTS NOT CONDUCTIVE AT ALL AND 5 REPRESENTS VERY CONDUCTIVE.

| | | | | |
|----|----|-----|-----|-----|
| 1 | 2 | 3 | 4 | 5 |
| 2% | 7% | 21% | 36% | 34% |

PLEASE RATE THE AVAILABILITY OF RESOURCES IN YOUR HOME OR OTHER WORKSPACE (E.G., COMPUTER, PRINTER, INTERNET CONNECTION, ETC.) WHERE 1 REPRESENTS LITTLE OR NO AVAILABILITY AND 5 REPRESENTS COMPLETE AVAILABILITY.

| | | | | |
|----|----|-----|-----|-----|
| 1 | 2 | 3 | 4 | 5 |
| 1% | 5% | 18% | 36% | 41% |

WHEN WORKING FROM HOME OR OTHER WORKSPACE NOT PROVIDED BY YOUR EMPLOYER, HOW OFTEN DOES THE SPEED OF YOUR INTERNET CONNECTION NEGATIVELY AFFECT YOUR EXPERIENCE DURING WEB-BASED CONVENINGS?

| | | | | |
|-------|--------|-----------|------------|--------|
| NEVER | RARELY | SOMETIMES | FREQUENTLY | ALWAYS |
| 13% | 41% | 35% | 10% | 1% |

Asked to rate how conducive their remote workspace is to getting work done, 70% of the respondents gave their physical space a score of 4 or 5 (out of 5), indicating a high level of satisfaction despite the familiar anecdotes about screaming kids and frisky pets. There was also a high level of satisfaction with the resources available to turn the space into an efficient and effective workplace with 77% of respondents rating 4 or 5.

The only sign of trouble came when we asked about Internet connectivity, specifically if the speed of connections caused problems when participating in online convenings. While the majority of respondents said this was rarely or never a problem, nearly half (46%) said it was an issue at least some of the time, a number large enough to warrant attention.

What constitutes a good online convening may hinge entirely on the quality of video and sound. A bad connection alone can ruin a meeting. Employers should ask remote workers if their upload and download speeds (which are easily measured by free services such as [Speedtest](#)) are sufficient to participate in videoconferences and then have a plan to upgrade those who need it.

“We are all Robert Kelly now.”

Remember Robert Kelly? The name may not ring a bell, but the picture here (captured from a BBC News interview) probably will. Kelly is a political science professor at Pusan University in South Korea, and when an impeachment scandal in the South Korean government made news in March 2017, the BBC interviewed Kelly via Skype. Working from his home office and dressed in a suit and tie, Professor Kelly was the picture of professionalism...until his four-year old daughter, Marion, strutted into the room followed almost immediately by her younger brother, James.



Kelly did his best to keep calm and carry on, but the interview veered into slapstick when his wife, Jung-a Kim, literally skidded into the scene, desperately trying to wrangle the children before they became too much of a distraction. By then, however, the damage was done, and the Kelly family was headed for Internet stardom. CNN, The Guardian, and BuzzFeed immediately picked up the story, the [video](#) went viral on Twitter, and Kelly became known worldwide as “BBC Dad.”

In March 2020, the BBC invited Kelly and his family back to their airwaves for the same reason we’re invoking his name now. While we all had a good laugh at his expense back in 2017, little did we know that Robert Kelly was giving us a glimpse of the future. As one Twitter commenter astutely noted after the 2020 interview, “We are all Robert Kelly now.”

We are professionals, we work hard, and we are committed to doing the job well, no matter where or how we have to do it. But...

We are working in extraordinary times, so we must accept that things will go sideways on occasion. Dogs will bark and cats will nestle on keyboards. Sirens and leaf blowers will drown us out. Children will come looking for their parents.

So, our final recommendation is this: Whenever you participate in videoconferences – whether as a result of a global pandemic or just because that’s how business is being done now – give yourself and others the space and grace that this way of working requires. A good sense of humor will come in especially handy. Just ask Robert Kelly.

Quantitative Research

Quantitative research was conducted through a survey hosted on SurveyMonkey. The survey, which was designed by The Goodman Center in consultation with our project partners, consisted of 100 questions divided into four sections. The first section included general questions about the experience of working remotely, especially when using videoconferencing platforms such as Zoom, Microsoft Teams, Webex, and others. There was also a series of demographic questions so we could have a clear picture of who was participating in the survey.

For the remaining three sections, we divided the experiences remote workers were having during videoconference into three categories: web meetings, webinars, and webcasts. (See the Executive Summary for a full explanation of each category.) Respondents were asked to complete questions for the category (or categories) in which they participated regularly and were not required to complete the entire survey – consequently the sample sizes vary for each question.

To attract a large number of respondents from the public interest and education communities, we recruited partners who shared our interest in this research and could generate broad awareness for the survey. The partnership behind this report includes (in alphabetical order): America's Promise Alliance, Borealis Philanthropy, Capacity Canada, Center for Public Interest Communications, Chronicle of Philanthropy, Communications Network, Council for Advancement and Support of Education, Council on Foundations, Emerging Practitioners in Philanthropy, Forum One, Grantmakers for Effective Organizations, Independent Sector and Points of Light. Partners promoted the survey through email and social media in July 2020.



The survey was administered in two phases. First, from June 25 through July 3, 2020, we conducted a two-week pilot with a relatively small sample to ensure we were asking questions that would elicit useful information and also to confirm they were clearly understandable. The Center for Public Interest Communications at the University of Florida promoted this test run to their mailing list of 4,000 people and generated 174 responses, which were incorporated into the final data set. After July 3, we interviewed a small group of respondents to capture detailed feedback on the process of taking the survey. This informal focus group helped us refine some of the language, add a few more questions, and ensure that the version launched in the wider second phase would yield the insights we were seeking.

That second phase began on July 14, 2020 and remained open until August 6, 2020. Thanks to the promotional efforts of our partners as well as 14 other organizations (listed in the Acknowledgements), we generated 4,231 respondents from across North America (with a sprinkling of public interest professionals from around the world) giving us 4,405 respondents in all. Since all participants were self-selecting, we cannot claim that this is a representative sample of the public interest and education communities, but in the many instances where such a sizable volume of responses yielded clear patterns and trends, we believe there are guidelines worthy of your consideration.

Edge Research, which helped design the survey and analyzed the data for our book, *Why Bad Presentations Happen to Good Causes*, joined our partnership in August to lead the analysis of the survey responses. Sarah Nadeau, MPP, an independent contractor, also assisted in analyzing sections of the survey.

Qualitative Research

To provide further context for the data, we conducted qualitative research from May to July 2020. Via Zoom and telephone, we conducted a total of 28 interviews with staff members of Casey Family Programs, a national operating foundation focused on foster care and child welfare; the Center for Medicare and Medicaid Services, a federal agency within the US Department of Health and Human Services; the Centre for Effective Services, a nonprofit with headquarters in Dublin and Belfast that helps improve services for children across Ireland; and the Natural Resource Governance Institute, an international nonprofit dedicated to improving countries' control over their natural resources to promote sustainable and inclusive development.

While about half of the interviewees were based in the United States, speaking with people based in Denmark, Ghana, Guinea, Ireland, Myanmar, Peru, Tanzania, Tunisia, and the United Kingdom opened a window to the challenges of working remotely all over the world. (As it turns out, they are not so unique. A bad Zoom meeting is bad in pretty much the same ways wherever you go.)

Who Participated in This Study

A total of 4,405 people participated in the survey. The average age of respondents was between 40-59 years old. This older skew is comparable to a similar study of the public interest sector conducted by Edge Research in 2020 which found 49% of respondents to be within the 45-64 age range.

The average and most frequent respondent was White or European American (80%). People of color comprised 17% of all respondents and self-identified as Black or African American (6.3%), Hispanic, Latinx, or Spanish Origin (5.2%); Asian/Asian-American (4%), American Indian or Alaska Native (1%), and Middle Eastern or North African (1%).

The most frequent pronouns chosen by respondents were she/her/hers (78.1%), followed by he/him/his (18%) and they/them/theirs (1%). As noted above, these results are similar to an Edge study of the public interest sector in which participants were 76% female, 22% male, and 2% self-identifying as other.

No matter how close our sample came to reflecting the demographics of the sectors that participated, we recognize that it is still predominantly older, white, and female. To help amplify voices that might otherwise not be heard, we asked Edge Research to conduct cross-tabulations by gender, age, and racial identity. Where those results revealed statistically significant differences from the larger body of respondents, we have included them throughout the report.

Where They Work

The largest group of respondents (48%) work in the nonprofit/NGO sector. The second largest group of respondents works in education (43%), followed by philanthropy (22%) and government agencies (9%). Those who work in the commercial sector were the lowest reporting sector of respondents, making up 4% of the study.

| | |
|---|------------|
| NONPROFIT/NGO | 48% |
| EDUCATION | 43% |
| PHILANTHROPY (E.G., FOUNDATIONS) | 22% |
| GOVERNMENT AGENCY | 9% |
| OTHER | 7% |
| COMMERCIAL | 4% |
| PREFER NOT TO ANSWER | 1% |

(Note: total exceeds 100% since respondents could choose all sectors that applied to them.)

This report and the research behind it would not be possible without the generous contributions of time and attention from so many individuals and organizations:

First, a deep bow and sincere thanks to **The First People I Call** whenever I have an idea and want to know if it's worth pursuing: Marci Alboher, Ann Christiano, John Gomperts, Kristen Grimm, Rob Moore and Stefanie Weiss (who also edited this report) – thanks for the encouragement, advice, introductions, off-hours texts, and everything else that got this project off the ground.

Thanks to the team at **Grantmakers for Effective Organizations** (Jaser Alsharhan, Margie Obeng, and Kyle Rinne-Meyers) for serving as an ad hoc executive committee on this project, and for overseeing the design and implementation of the survey. Your enthusiasm and willingness to pitch in every step of the way was simply amazing.

We knew from the start that designing a survey would be far easier than convincing people to take it, so we searched for **Project Partners** who were as interested in this research as we were and who could help us spread the word far and wide. Thanks to the following organizations and people who stepped up and donated considerable time and resources to recruit respondents:

- America's Promise Alliance (Dennis Vega, Nathaniel Cole and Michelle Smith)
- Borealis Philanthropy (Kristell Caballero Saucedo)
- Capacity Canada (Cathy Brothers, Andrew Wilding)
- Center for Public Interest Communications (Ann Christiano, Ellen Nodine, Matt Sheehan)
- Chronicle of Philanthropy (Stacy Palmer, Margie Fleming Glennon)
- Communications Network (Sean Gibbons, Tristan Mohabir, Yabsera Faris)
- Council for Advancement and Support of Education (Rob Moore, Rachel Roberts)
- Council on Foundations (Kristen Scott Kennedy, Nicole Forman)
- Emerging Practitioners in Philanthropy (Storme Gray, Erin Roberts)
- Forum One (Chris Wolz, Elisabeth Bradley, Sara Tetreault)
- Grantmakers for Effective Organizations (Jaser Alsharhan, Margie Obeng, Kyle Rinne-Meyers)
- Independent Sector (Dan Cardinali, Kristina Gawrgy Campbell)
- Points of Light (Christine Schoppe)

Even with all that support from our Project Partners, we also recruited several **Signal Boosters** to further spread the word about the survey and encourage participation. Thanks to these organizations for stepping up as well:

- Academy for Teachers
- Bank of America Charitable Foundation
- Centre for Effective Services
- Encore.org
- Frameworks
- Hartford Foundation for Public Giving
- Moses Taylor Foundation
- North American Association of Environmental Educators
- Oishei Foundation
- Princeton Area Community Foundation
- Southern California Grantmakers
- Spitfire Strategies
- Women of Color in Fundraising and Philanthropy

Thank you to each and every one of the **4,405 Respondents** to our survey. We promised you a copy of this report in return for your time answering all our questions – and we know there were *a lot* of questions – so if you were one of those patient people, here you go!

Once we had all that data in hand, we knew we would need help analyzing it, so we turned to our friends at **Edge Research**, who were such invaluable partners for our previous report, *Why Bad Presentations Happen to Good Causes*. Thank you, Pam Loeb, Keith Tonsager, Liana Gainsboro and Eli Loeb for helping us find the stories in the numbers. Thanks also to **Sarah Nadeau**, MPP, and researcher extraordinaire for her assistance analyzing several sections of the study.

Thank you to **Casey Family Programs, Centers for Medicare and Medicaid Services, Centre for Effective Services**, and **Natural Resource Governance Institute** for allowing us to interview your team members as part of our qualitative research.

Additional thanks to the friends and colleagues who helped at various points throughout this project in ways too varied to describe here: Eric Brown, Maggie Dugan, Niamh Farren, Rodney Ferguson, Charlie Henderson, Ann Hendrick, Nat Kendall-Taylor, Asmara Klein, Erika Larson, Jess Littman, Michael Martin, Matt Miller, Shannon Olsen, Colin Rowan, Paul Shoemaker, Steve Stockman, Emily Troisi, Ed Walz, Rick Wartzman and Sara Wiebke.

Everything we do at The Goodman Center we do as a team, and I will always be deeply indebted to **Celia Hoffman** for her insights, inspirations, and intuition which always lead us to the right place. (Celia also is a wonderful graphic artist and designed our report cover.)

Last, and certainly not least, thanks and big love to the home team – **Carolyn, Daniel** and **Olivia**. At work, I'm focused on helping "do-gooders do better." At home, there is nothing better than being with you.

Andy Goodman
October 2020



Andy Goodman is Director of [The Goodman Center](#). Along with *Storytelling as Best Practice*, he is author of *Why Bad Ads Happen to Good Causes* and *Why Bad Presentations Happen to Good Causes*. He also publishes a monthly journal, *free-range thinking*, to share best practices in the field of public interest communications.

Andy is internationally known for his speeches and workshops on storytelling and has led over 500 trainings for clients including CARE, The Nature Conservancy, Boys and Girls Clubs of America, NOAA, the San Diego Zoo, MIT, Princeton, the Bill and Melinda Gates Foundation, the Robert Wood Johnson Foundation, GE, Bank of America, and many others.

He has designed communications curriculum for the College for Social Innovation in Boston as well as for the African Leadership University in Mauritius. When not teaching, traveling, or recovering from teaching and traveling, Andy serves on the advisory board of the Institute for Human Caring.

Report designed by Hilary Andersen