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**POLICY AND PROCEDURES**

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**Office of Strategic Planning****Conducting Effective Meetings in CDER: Remote Access Considerations**

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**PURPOSE**

This MAPP establishes remote access best practices for conducting effective web-based meetings including trainings, workshops, division meetings, and townhalls across CDER.

This MAPP outlines procedures and responsibilities of all meeting participants, to ensure CDER meetings are effective when participants are working from remote locations.

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**BACKGROUND**

CDER staff must perform essential functions at all times, including during emergencies and Continuity of Operations Program (COOP) events. Specific tools and technologies are identified to ensure productivity, efficiency, and access to information from any location.

Available tools and technology are tailored to match the meeting's structure and objectives. Meeting host(s) may obtain support from FDA's Office of Digital Transformation (ODT) Office of Information Management Technology (OIMT).

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During the COVID-19 pandemic, HHS implemented COOP to mitigate the spread of the virus. During this time, FDA initiated procedures limiting social gatherings in the workplace.

Within this MAPP, references to web conferencing refer to both Microsoft Teams and ZoomGov.

Information on social distancing with workspaces and conference rooms, is found in the Return2Facilities@FDA protocol (see Attachment 1).

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## **POLICY**

Meeting organizers ensure all internal meetings are accessible to CDER staff members working from remote locations.

This policy does not apply to meetings for which a manager or supervisor determines that in-person attendance is required.

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## **RESPONSIBILITIES**

### **CDER Managers and Supervisors**

- Be familiar with FDA's web conferencing tools, technical support, and training options.
- Ensure staff are trained in web conferencing tools.
- Ensure staff have accounts allowing them to create virtual meetings.
- Ensure staff use web conferencing to facilitate meetings.
- Encourage staff to actively participate during meetings, when attending a meeting from a remote location.

### **Meeting Organizers (Host)**

- Be familiar with FDA's web conferencing tools, technical support, and training options.
- Ensure the selected web conferencing tool allows off-site meeting participants to view slides and meeting documents in real time.
- Ensure the selected web conference tool can accommodate the number of people participating in the meeting (see Attachment 2).
- Make every effort to start each web conference on time. Activate the web conference 10 – 15 minutes before the scheduled start time to ensure the meeting begins on time.

- Use the attendance feature of the web conferencing system to determine attendance.
- If a meeting involves the discussion of sensitive or confidential information, ensure that only registered users and accepted guests join the conference. Verify the identity of each meeting participant.
- Distribute the agenda, handouts, web conferencing link, teleconference number, and supporting information at least one day in advance of the meeting.
- Ensure that equipment is set up and functioning properly in advance of the meeting. Test audibility and visibility of materials for all participants, and correct any audio or visual problems, in advance of the meeting, if possible.
- If any participants have disabilities that limit their ability to participate, use existing technological tools, such as the closed captioning capability of the web conferencing tool, or interpreting services.
- Delegate responsibility for complex elements of managing meetings that involve remote attendees to an expert technician, if appropriate.
- Ensure that telephone and auxiliary microphones are optimally placed to maximize their effectiveness, and minimize the impact of other sound sources, such as projector fans.
- At the start of the meeting, announce the following:
  - Participants should mute their telephones or microphone.
  - Speakers should speak clearly and audibly into microphones.
  - Meeting participants should state their names when offering comments or questions.
  - Instruct remote participants on the preferred method to submit questions or comments for this meeting.
  - Host or speakers should restate questions to ensure remote attendees can hear the entire question.
  - Discourage sidebar conversations.

### **Remote Meeting Participants**

- Participate in web conferencing training in advance of work-related web conferencing, to ensure knowledge of how to ensure visual and audio connections, chat features, mute button, headsets, and cameras.
- Be proficient in connecting to web conferencing meetings.
- Connect to the web conference on time.
- Clearly state name, office and division when asking or answering questions or offering comments.
- Notify the host if meeting participation availability changes.

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- Use the mute button not speaking, to reduce feedback or static and to minimize disruption to other meeting participants.
  - Notify the meeting host of any connectivity, or audio, or visual problems.

### **On-Site Meeting Participants**

- Limit noise generated in the conference rooms. Use the mute button when not participating in the conversation.
- Limit sidebar conversations, movement of papers, and use of personal electronics.
- When speaking, asking questions, or commenting, direct your voice into a microphone, as appropriate.
- Remember to include the remote participants in discussions.

### **CDER Staff with FWAP Agreements**

- Be proficient in the tools that allow them to connect to meetings from remote locations.
- Take advantage of FDA-sponsored training, to ensure competency with new tools, as they are released.

### **FDA OIMT**

- Provide training for current and upcoming web conferencing tools.

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## **PROCEDURES**

### **Setting Up a Meeting**

- Meeting host(s) obtain an individual web conferencing account. Note: CDER managers, project managers, and others who routinely host web conferences should be trained in web conference tools.
- Meeting host shares the dial-in phone number, username and password requirements, web conference link, meeting agenda, and other meeting documents at least one day in advance of the meeting.
- When meetings containing sensitive information are made available through a web conference, meeting host controls the access. Participants are given a login and password. Participants will not be able to log in as "Guest."

**Note:** If sensitive information will be presented during the meeting, it is highly recommended the meeting not be recorded. Meetings with industry cannot be recorded.

- Meeting host(s) reserve a physical meeting room, if appropriate.
- Meeting host(s) who are managing a meeting remotely, especially from an off-campus location, consider having a back-up plan for meeting management in the

event of transient connectivity issues. A back-up plan may involve identifying additional host(s) when the meeting is established. Meeting host(s) who are off campus will make appropriate arrangements for meeting set-up on site, when appropriate, and provide this information to the team.

Meeting host(s) open the virtual room up to 15 minutes before the start of the meeting. For large in person meetings, meeting host(s) may reserve the conference room for 30 minutes in advance of the meeting to set up and test the connection and microphones, and to ensure the meeting starts on time.

### **Running a Meeting**

- Meeting host(s) compensate for participant's visual or acoustic issues. This includes:
  - Ensuring proper positioning of phones and microphones in the conference rooms, so staff in the room are heard.
  - Encouraging speaking participants to speak clearly and audibly into a microphone.
  - Minimizing background noise.
  - Discouraging sidebar conversations.
  - Reminding participants to mute their phones when participating remotely.
  - Repeating questions for remote participants, as needed.
  - Reminding all meeting participants to state their names when offering comments or questions during the meeting.
  - Reading questions that are sent from participants through the web conferencing system.
- Meeting host(s) monitor and facilitate discussions, so all individual contributions will be heard and considered.
- Meeting host(s) summarizes key points of the meeting, near the end of the call.

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### **REFERENCES**

- OPM, 2021 Guide to Telework and Remote Work in the Federal Government.
  - GSA, 2007, Information Technology and Telecommunications Guidelines for Federal Telework and Other Alternative Workplace Arrangement Programs.
  - FDA, 2020, Get the Facts: Return2Facilities. COVID-19 Information for FDA Staff.
  - FDA SOP 600-04, 2014, FDA Telework Program Policy.
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**DEFINITIONS**

**Web conferencing tools:** Tools that allow conferencing events to be attended from remote locations.

**Web conference:** A meeting in which participants remotely connect to other participants over the internet. Participants can access the meeting and be connected to other participants via the internet from their alternate worksite.

**Meeting Host:** CDER managers, project managers, and others who routinely host web conferences and are trained in web conference tools and procedures.

**Sensitive:** A meeting reviewing trade secrets or other confidential or commercial information. The U.S. Department of Health and Human Services (HHS) defines “sensitive information” as information that has a degree of confidentiality such that its loss, misuse, unauthorized access, or modification could compromise the element of confidentiality and thereby adversely affect national health, HHS programs, or the privacy of individuals under the Privacy Act or the Health Insurance Portability and Accountability Act. FDA employees are also responsible for observing the Uniform Trade Secrets Act, which provides criminal penalties for unauthorized disclosure of trade secrets and confidential, commercial, or financial information.

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**EFFECTIVE DATE**

This MAPP is effective upon date of publication.

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**CHANGE CONTROL TABLE**

Effective Date	Revision Number	Revisions
06/10/13	Initial	n/a.
05/20/15	Rev. 1	Included Cisco WebEx as an alternate tool.
07/07/15	n/a	MAPP transferred from CDER/OCOMM to CDER/OSP/OBI.
12/08/21	Rev. 2	Updated to replace WebEx, Adobe, and Skype with MS Teams and ZOOM. Referenced Return2Facilities and added attachments referencing pandemic procedures at FDA and preferred platform for meetings and conferences. Removed softphone and VOIP definitions.

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**ATTACHMENT 1: Return2Facilities@FDA**

During the pandemic, HHS implemented COOP to mitigate the spread of COVID-19. As a result, FDA initiated procedures limiting social gatherings in the workplace. For additional information on social distancing with workspaces and conference rooms, please reference the Return2Facilities@FDA protocol.

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**ATTACHMENT 2: Platforms For Meetings**

Preferred platform for meetings and conferences:

Meeting Requirements/Features	Preferred Platform
Host 1 – 1000 <b>internal</b> attendees	<b>MS Teams</b>
Host 1 - 500 <b>external</b> attendees	<b>ZoomGov</b>
Host <b>over</b> 500 attendees	<b>Contact Employee Resource Information Center (ERIC)</b>
Survey attendees	<b>ZoomGov</b>