

Suggestions for running a more effective review when all or most of the participants are remote. Collected in March, 2020 by the NASA Psyche mission leadership team and friends.

1) Review Introduction

- a) Take a few minutes at the start of the meeting/review to emphasize the protocol to be taken throughout the day ... including a summary of the instructions/recommendations below. For multi-day reviews repeat the above each morning and perhaps at the start of the afternoon session in case new folks are joining the review.
- b) Thank everyone for their participation under abnormal circumstances. It is the Project's goal for all reviews to be held as scheduled and to be effective. An effective review is one that fully identifies and creates RFAs or other forms for all missing risks, concerns, gaps.
- c) The Convening Authority should work with the Review Board Chair ahead of time to agree on the protocols and strategy to be taken to insure an effective review.
- d) If the Convening Authority and the Review Board Chair agree, for whatever reason, that a review is not on track to be effective they should consider terminating the review and reconvening at another time after the logistical issues can be addressed.
- e) Announce where folks can download copies of the presentation package (see below).
- f) Announce that everyone should take pains to remember to say their name when they speak.
- g) To improve your odds of staying connected during this period of high-volume teleworking, first join each session via your computer, and then use your phone for the audio. Have the application call you if possible.
- h) The following are additional ideas that the Convening Authority may choose to include in their opening remarks.
 - i) "You are all here because you are experts, and every problem you catch here saves us from having it later." (Source: Allan Stern).
 - ii) "The best news is bad news brought early. Please bring us all your news today." (Source: Lindy Elkins-Tanton)
 - iii) "Please be additionally vigilant to stay focused on the review. If you have itchy fingers then do something else to busy them, like knitting or playing a text-free mindless smartphone game (people cannot read and listen at the same time). Occupy your hands so you are not reading other things, or emailing. (Source: Lindy Elkins-Tanton)

- iv) "When we are all in the same room, we read each other all the time. When we are working virtually, we need to emote more, and speak up more." (Source: Alan Stern)
 - i) Along the lines of the above, reward people for bringing problems forward. Make examples of people who bring forward issues. It will help to further engage others.
- 2) Webex Operator
 - a) a. Identify person responsible for monitoring Webex connection
 - i) This person must be Webex savvy.
 - ii) This should not be the person running the review, nor any board member.
 - b) Identify this role (and person's name and contact information) in the body of review/meeting invite and instruct folks with problems to email or text them.
 - c) The Operator should monitor the connection throughout the course of the meeting.
 - d) The Operator should mute and unmute anyone who is connected as needed.
 - e) The Operator should help the Convening Authority and Review Board Chair in the task of enforcing in-room use of microphones.
 - f) Operator should help the Convening Authority and Review Board Chair to ensure that speaker calls out slide numbers as they progress through their presentations.
 - g) The Operator should maintain awareness of side conversations going on in the Webex Chat room (see below). If side chats are not permitted by the Convening Authority and Review Board Chair, notify convening authority and review board chair. If permitted, and significant conversation is taking place notify the Convening Authority and Review Board Chair so that they can bring the conversation to the attention of all the participants, if needed.
- 3) Breaks
 - a) More frequent breaks are more important when you're virtual. It takes more determination to pay attention.
 - b) Clearly announce breaks, duration, and return time.
 - c) Project a page on Webex indicating when you are on break and when the review will resume.
 - d) Allow people without on-site catering time to leave the room for their snacks etc.
- 4) Discussion protocol
 - a) When a topic seems to be wrapping up the Convening Authority or Review Board Chair should consider querying the folks online to make sure everyone has gotten their chance to speak before moving on to the next topic.

- b) The Convening Authority or Review Board Chair should periodically pause discussion (10 - 15 minutes) and give a brief pithy summary statement regarding the discussions that were just had (e.g., "Here is what I heard ...), and then query the review board and audience to make sure everyone is following along, engaged, and has been able to ask any questions they may have (simply saying, "Any questions?" is almost never effective). This is especially important if the online audience appears to be going silent.
 - c) The Review Board Chair should keep track of which reviewers are online, and make sure to call them out specifically during the periodic pauses ... again to make sure they remain engaged.
 - d) In the absence of nonverbal clues, people who ask questions should respond to answers with comments like, "Thanks, that answers my question," or "Tell me more about this part..." to make sure that the line is taken to completion.
- 5) Webex Chat Room
- a) The Convening Authority and Review Board Chair should decide ahead of time if they want to allow side conversations in the Webex Chat room. Policy should be announced at beginning of review.
 - b) The convening Authority and Review Board Chair should consider whether they would like a dedicated Mattermost (or other) chat channel for the board alone. (Source: Cathy Olkin)
- 6) Review Board Member Video Links
- a) Consider having key members of the review board keep their cameras on. (Source: Cathy Olkin)
- 7) Presentation
- a) Distribute and include link to the presentation package in the review/meeting invitation.
 - b) Remind speaker to call out the page number every time it changes. Some folks may not have the bandwidth for video and will have to follow along manually.
- 8) Microphones
- a) Remember to instruct everyone ahead of time to mute their mics when not speaking if they are participating remotely.
 - b) Convening Authority and Review Board Chair need to reinforce a strict use of conference room microphones if a portion of the review board/audience is meeting in person.