



## Virtual vs Face to Face Meetings? A Decision-making Tool

### What is the purpose of this tool?

The assumption is that remote partnering can work perfectly well (perhaps, in some ways, even better than face to face) so long as the process is well managed and the partners commit to active and constructive engagement. However, it is clear from practitioners' experience that there are (at least) a number of considerations about the added value of face to face meetings that those managing / brokering remote partnerships need to consider. These are:

- That remote partnering seems to work far better **where those involved have actually met each other face to face** (even if only once) – perhaps at an early stage of scoping and building the partner relationships
- That working remotely **cannot substitute entirely for face to face meetings** for certain functions or situations – in other words that whilst remote partnering can work well for many elements of partnership, it cannot substitute for everything
- The **scale, type and complexity of the partnership** – the more complex the greater need for at least some face-to-face time
- The **longevity of the partnership** – is it worth investing the extra resources in face-to-face meetings if it is a short-term arrangement?
- Level of **resources available** (this covers both time and money– it is clear that there is often a scarcity of both)

The purpose of this tool is to help practitioners who are, for the most part, working remotely decide: when face-to-face meetings / events are critical to the partnership's well-being / productivity and how best to optimise the rare face to face opportunity when it happens.

### Who is the tool for and how can it be used?

The tool is designed to help you to: think through options; liberate your thinking about what is possible / necessary and apply rigour to the decision-making and planning processes. It does not provide 'answers' per se. Whilst it does provide an opportunity for you as a partnership manager / broker to capture your own thoughts about what decisions are necessary, it is essentially a collaborative planning tool. It can be used as part of a partnership decision-making and planning conversation that is held remotely.

The tool that follows is designed as a decision-making tool to help really analyse and assess when meeting face to face is **essential** (as opposed to it just being desirable or that a face to face meeting is actually unnecessary or could even be counter-productive).

The tool is in two parts:

1. When must partners meet face to face?
2. How best to use face to face time

## Part 1: When must partners meet face to face?

This section of the tool uses the **Partnering Cycle** (adapted by PBA) as a framework but you can, of course, **construct your own framework** to ensure it is suited to your specific context and partnership.

The Partnering cycle has four phases, which are iterative (and sometimes circular), rather than linear. Each stage has several tasks and activities, several of which have been indicated below. Please adjust (take out / add in) as suitable for the needs of your partners / partnership.

<b>Phase in Partnering Cycle:</b>	<b>Key Activities:</b>	<b>What can be done remotely? How? <sup>1</sup></b>	<b>What must be face to face? Why? <sup>2</sup></b>
<b>Scoping &amp; Building</b>	Initiating the partnering idea		
	Identifying potential partners		
	Conducting partner assessments		
	Co-creating the project		
	Early relationship building		
	Embedding partnering principles		
	Negotiating a collaboration agreement		
	Others		
<b>Managing &amp; Maintaining</b>	Securing agreed resource commitments		
	Co-creating governance arrangements		
	Problem solving		
	Helping capture the partnership stories		
	Challenging and changing		
	Engaging in blue skies thinking		
	Others		

<sup>1</sup> Remember that there are many tools and guidelines available in this Tool Box that introduce innovative approaches to

<sup>2</sup> Remember that meeting face to face (especially in global partnerships) can be costly and use resources that could have been used for projects and programmes – a cost benefit analysis should be undertaken before committing to such meetings

<b>Phase in Partnering Cycle:</b>	<b>Key Activities:</b>	<b>What can be done remotely? How? <sup>1</sup></b>	<b>What must be face to face? Why? <sup>2</sup></b>
<b>Reviewing &amp; Revising</b>	Co-creating review procedures		
	Drawing out lessons		
	Making necessary changes		
	Brainstorming new ideas and developments		
	Others		
<b>Sustaining Outcomes</b>	Discussing moving on options		
	Sharing learning and experience		
	Managing closure procedures		
	Agreeing procedures for sharing learning		
	Others		

## **Part 2: How best to use the face-to-face time?**

Economic constraint is the most frequently cited reason for working remotely so once a decision that a face to face meetings / event is essential has been made – and partners have accepted this and have agreed to allocate the necessary resources (funds, time and energy) – it is vitally important for the time spent together to be used as imaginatively and productively as possible.

The next consideration, having agreed to a face-to-face meeting, is to design the intervention, planning carefully how best to use the time for optimal added value (in terms of outcomes, outputs and impacts). The meeting facilitators / partnership brokers need to ensure that there is as much participatory activity and engagement as possible – where all participants are fully active (mentally and / or physically) and feel that their individual contribution is sought, valued and built on.

This is an initial list to get you thinking about your own situation... you will, over time, build your own list based on experience and feedback.

<b>TYPES OF INTERVENTION THAT CAN OPTIMISE FACE TO FACE MEETINGS:<sup>3</sup></b>		
<b>What?</b>	<b>Scenarios where this might work well?</b>	<b>Considerations in making the decision:</b>
<b>Facilitating (difficult) conversations</b>	<ul style="list-style-type: none"> <li>• <i>Example: Where there are underlying tensions or unresolved issues that may lead to conflict and need addressing</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Example: Perhaps best facilitated by someone not directly involved in the partnership</i></li> </ul>
<b>Working in pairs / small groups</b>	<ul style="list-style-type: none"> <li>• <i>Example: When there would be value in people working with those they do not usually work with</i></li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Example: What kinds of topics would benefit for an exploration of different approaches and values?</i></li> <li>•</li> </ul>
<b>Brainstorming sessions</b>	<ul style="list-style-type: none"> <li>• <i>Example: Where some ‘blue-skies’ thinking would energise the partnership and where it is important to have outputs that are co-created and co-owned</i></li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Example: Are those present very different in status and / or uneasy with each other? Would such an approach therefore be too difficult?</i></li> <li>•</li> </ul>
<b>Story telling</b>	<ul style="list-style-type: none"> <li>• <i>Example: Partners telling stories that illustrate their specific scenarios (the cultural issues, constraints, history etc) to make their contributions as partners more context-specific</i></li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Example: Story-telling is a universal phenomenon and often communicates underlying emotions and issues very vividly – however, some may feel shy about, or unskilled in, telling stories</i></li> <li>•</li> </ul>
<b>Working with games</b>	<ul style="list-style-type: none"> <li>• <i>Example: When the partnership needs to be energised and / or to reveal underlying characteristics (eg how quickly the group becomes competitive) that can then be addressed indirectly through a de-brief of the game</i></li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Example: What will it take to encourage more reluctant people (eg those who don't like to feel ‘foolish’ or those who think this is time-wasting) to give it a go...</i></li> <li>•</li> </ul>
<b>Working with imagery</b>	<ul style="list-style-type: none"> <li>• <i>Example: When it would be useful to introduce an element of more creative / imaginative thinking into the partnership</i></li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Example: How to counteract people’s self-consciousness about working with images rather than words</i></li> <li>•</li> </ul>
<b>Collective planning / reviewing</b>	<ul style="list-style-type: none"> <li>• <i>Example: Working from individual / small group ideas-generation to a whole group output so that everyone has had a genuine input / voice</i></li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Example: How to adapt this in relation to size of group (can be done with very large groups but needs very careful management)</i></li> <li>•</li> </ul>

<sup>3</sup> See DOING DIFFERENT tab on the DEFYING DISTANCE website for some innovative ideas for working with partners

**TYPES OF INTERVENTION THAT DO NOT OPTIMISE  
FACE TO FACE MEETINGS:**

- **Formal lectures / 1-way presentations** because whilst it is a useful method for communicating information to a big group in a time-efficient way, it tends to be a passive experience and to make those listening feel that their contribution is unwelcome / irrelevant

- **Too many sessions in large groups** because introverts do not like speaking in large groups and some of the best / wisest practitioners are introverts...

- **Few opportunities for 1-2-1 conversations** because the major reason for a face to face meeting is to be able to get to know each other better

- **Packed agenda with no 'space' for things to emerge** because none of us know what we don't know and sometimes it is actually in silence that individuals deepen their understanding and insights and then the group is able to generate unexpected and transformational ideas

- **Interventions developed by a few people with their own agenda(s)** because those attending will feel manipulated rather than engaged and the agenda may feel as if it is an exercise in containment rather than creative change

- **Sessions facilitated by a facilitator who does not have experience of partnering** because facilitating / brokering a partnership meeting requires first hand knowledge and experience of the specific challenges of partnering as a mechanism or it can cause serious damage to existing relationships and processes

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