Guidelines for the Organization of Fully Online Meetings
draft-kuehlewind-shmoo-online-meeting-04

Abstract

This document provides guidelines for the planning and organization of fully online meetings, regarding the number, length, and composition of sessions on the meeting agenda. These guidelines are based on the experience during the COVID-19 pandemic.

Discussion Venues

This note is to be removed before publishing as an RFC.

Discussion of this document takes place on the Stay Home Meet Only Online Working Group mailing list (manycouches@ietf.org), which is archived at https://mailarchive.ietf.org/arch/browse/manycouches/.

Source for this draft and an issue tracker can be found at https://github.com/mirjak/draft-shmoo-online-meeting.

Status of This Memo

This Internet-Draft is submitted in full conformance with the provisions of BCP 78 and BCP 79.

Internet-Drafts are working documents of the Internet Engineering Task Force (IETF). Note that other groups may also distribute working documents as Internet-Drafts. The list of current Internet-Drafts is at https://datatracker.ietf.org/drafts/current/.

Internet-Drafts are draft documents valid for a maximum of six months and may be updated, replaced, or obsoleted by other documents at any time. It is inappropriate to use Internet-Drafts as reference material or to cite them other than as "work in progress."

This Internet-Draft will expire on 2 September 2022.
1. Introduction

In 2020, the COVID-19 pandemic forced the IETF to move all its plenary meetings to online-only events. This document records the experience gained by holding plenary meetings fully online and the guidelines that have evolved from this experience. The aim of this document is to determine rough consensus of these guidelines in the sense that the most participants are sufficiently satisfied with the current organization of fully online events. These guidelines, however, document only one option of running fully online meetings. But as the IETF has done for in-person meetings, changes to the organization of the meetings and the meeting agenda should be
experimented with in the process of establishing future meeting guidelines.

2. Some History

When the WHO declared a world-wide pandemic in March 2020, the IETF had to quickly cancel its plenary meeting and organize an online replacement (within less than two weeks). For this first online-only meeting, the agenda was reduced to a set of sessions that benefitted most from cross-area participation, like BoFs, first-time meetings of a new working groups, and dispatch sessions, as well as the administrative plenary in order to organize the official hand-over procedures that occur at the March meeting.

With such a reduced agenda, it was possible to organize the meeting within roughly 2 sessions (about 4 hours) a day and a maximum of two parallel tracks. This was possible as all working group meetings were moved to interims which were then distributed over the coming six weeks. However, this was often perceived as increased load over a longer time. But at that point of time there was not necessarily an expectation that the situation would continue as long as it did.

For the following meetings in 2020, the online schedule was switched back to be similar to an in-person meeting (1-2 hour slots and 8-9 parallel tracks as described below), however, still with a reduced total length of initially 5 hours a day and then 6 hours with longer breaks.

All fully online meetings in 2020 have followed the time zone of the planned in-person meeting location, but starting roughly around noon. Some flexibility with the start time to be "around" noon has been used to mitigate the worse possible time slots, even though, given the distribution of participants it is not possible to avoid certain hours entirely. The in-person meeting location follows the 1-1-1 rule as documented in [RFC8719] to rotate between Asia, Europe, and North America. While the exact time slot used had led to various discussions, following roughly the 1-1-1 rule to share the pain has/seems to have rough consensus.

3. Guidelines for Online Meeting Planning
3.1. Time Zone Selection

This time selection enables to have 2 out of 3 fully online IETF plenary meetings during the day from most participants. Basically every full online meeting is for two regions of the three regions described in [RFC8179], roughly speaking, after sunrise or after dinner. This has the tradeoff that it maps the third region in middle of night. However, that also means for most participants only one remote meeting per year might require a significant change to sleep schedules.

The times are also seasonally adjusted to leverage differentials in Daylight Savings Time. These time slots are as follows, in UTC:

<table>
<thead>
<tr>
<th>Name</th>
<th>Times (Northern Summer)</th>
<th>Times (Northern Winter)</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>0500-1100 UTC</td>
<td>0600-1200 UTC</td>
</tr>
<tr>
<td>Night</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Night</td>
<td>1300-1900 UTC</td>
<td>1400-2000 UTC</td>
</tr>
<tr>
<td>Europe Night</td>
<td>2200-0400 UTC</td>
<td>2200-0400 UTC</td>
</tr>
</tbody>
</table>

Table 1

The intent of rotating between these three slots is to scatter meetings throughout the course of the global day, to maximize the ease of participants to occasionally attend regardless of their location and what time of day is optimal for their schedule.

3.1.1. Rules for selection

The IETF will select a start time from these three choices based on the past three meetings. The following table covers all permutations of previous meetings held in-person in Region A, B, or C; or remotely in the nights of one of those regions.
### Table 2

<table>
<thead>
<tr>
<th>3 meetings ago</th>
<th>2 meetings ago</th>
<th>Last Meeting</th>
<th>Online Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any</td>
<td>Any</td>
<td>In-Person A</td>
<td>A Night</td>
</tr>
<tr>
<td>Any</td>
<td>Online A Night</td>
<td>Online B Night</td>
<td>C Night</td>
</tr>
<tr>
<td>Online A Night</td>
<td>In-Person B</td>
<td>Online B Night</td>
<td>C Night</td>
</tr>
<tr>
<td>In-Person A</td>
<td>In-Person B</td>
<td>Online B Night</td>
<td>A Night</td>
</tr>
<tr>
<td>In-Person A</td>
<td>In-Person A</td>
<td>Online A Night</td>
<td>see below</td>
</tr>
<tr>
<td>Online A Night</td>
<td>Online B Night</td>
<td>Online C Night</td>
<td>A Night</td>
</tr>
</tbody>
</table>

Basically this table follows two rules: 1) When ever a fully online meeting follows an in-person meeting, the online meeting time is used that disadvantages most the participants of the time zone where the in-person meeting was held. 2) If multiple fully online meetings follow each other, the time zone selection should be rotated based on the most recent time zones that the in-person meetings were held in.

The final case occurs in the rare event that back-to-back in-person plenaries occur in the same region. In this case, find the most recent meeting that was neither in 'A' (if in person) nor in 'A' night (if remote). If this meeting was in-person in region 'B', then the next meeting will be in 'B' Night. If it was remote in 'B' Night, the next meeting will be in 'C' Night.

To initialize this algorithm, IETF 112 is considered as an 'Asia Night' remote meeting, and IETF 111 is a 'Europe Night' remote meeting.

3.2. Number of Days and Total Hours per Day

Online meetings have converged to run over 5 days with 6-hour meeting days, roughly. Only the administrative plenary, which concludes with multiple open mic sessions, is not necessarily time-bound.
Based on the experience so far, 6 hours of online meetings, with two 30 minutes breaks, appears to be potentially a natural limit of what is handleable for most participants. Respectively, the meeting survey after IETF 109 has indicated a high satisfaction with the distribution of sessions over 5 days but only a medium satisfaction with the overall length of each day [https://www.ietf.org/blog/ietf108-survey-results-informed-planning/].

While there is a possible trade-off between shorter but more days, a compact and potentially intense meeting was slightly preferred from the beginning by the community. And, different than for in-person meetings, also utilize time during the weekend was never considered as a possible option. So far, it was possible for all meetings to fit the requested number of sessions within 5 days, with the respective number of parallel tracks, see Section Section 3.4.

3.3. Session/Break Length

For fully online meetings there are typically less sessions per day, than for in-person meetings, in order to keep the overall meeting day to at roughly 6 hours. The reduction of the number of sessions per day led to the practice of offering chairs only two options for session length (instead of three), in order to make session scheduling more practical.

At IETF-108, based on an indicated preference of the community, 50 and 100 minute slot were used, with only 10 minutes breaks, in order to keep the overall day length at 5 hours. This resulted in many sessions going over time and thereby clearly indicated that only 10 minutes for breaks are not practical.

The survey after IETF-109 showed a high satisfaction with 60/120 minute session lengths and 30 minute breaks, and a significant improvement in satisfaction over IETF-108. [https://www.ietf.org/blog/ietf-109-post-meeting-survey/]

While the option to shorten the breaks was discussed during the later meetings, a saving of in total 10-20 minutes per day might not balance the need to use the breaks for recreation or at least some socialising.
3.4. Number of Parallel Tracks

Fully online meetings are not limited in the number of parallel
tracks by the physical restriction of a meeting venue aka the number
of meeting rooms. In order to reduce the number of possible
conflicts, it is still desirable to minimise the number of parallel
tracks by balancing the requested sessions mostly equally over the
available slots.

But if the total number of requested sessions exceeds the capacity of
the usual 8 parallel tracks, it is possible for a fully online
meeting to simply use more tracks. This also means, if the number of
meeting days is seen as fixed, this decision is implicitly made by
the working group chairs requesting a certain number of sessions and
length.

As more parallel sessions usually also mean more conflicts, chairs
are encouraged to request plenary meeting time carefully but also
based on realistic planning to avoid running over time. Use of
interim meetings should be consider instead where possible and
sensible, as discussed in Section Section 4.1.

4. Additional Considerations and Recommendations

4.1. Full vs. limited agenda (and interim meetings)

The IETF-108 meeting survey asked about the structure of that meeting
(full meeting) compared to that of IETF 107, which hosted only a
limited set of session followed by interims in the weeks after. The
structure of IETF 108 was preferred by 82% [https://www.ietf.org/blog/ietf-108-meeting-survey/]. While the
limited agenda of IETF-107 could have been a good one-time
replacement, the value of cross-participation and high active
meetings weeks has been recognised as important for continuous
progress (and not only for newly initiated work).

A highly concentrated meeting, in structure similar to the in-person
plenary meeting, provides value for cross-participants. Further a
well defined meeting time, rather than spreading many interims over
the whole year can make deconflicting with other non-IETF meetings
easier.

While the time during an in-person meeting can be used very
intensively, even a compact and full online schedule does often not
prevent day-job duties to occur in parallel. Therefore, allocating
more time can also make it more difficult for people to join and as
such needs to be balanced with the option to distribute load better
over the entirely year by a more regular use of interim meetings.
Use of (more) online interim meetings can also help to reduce scheduling conflicts during an IETF week and allow for a more optimal schedule for the key participants. Of course these interim meetings are less likely to attract people with casual interest but provide a good opportunity for the most active participants of a group to have detailed technical discussions and solve recorded issues efficiently.

4.2. Flexibility of time usage

This document recommends that new opportunities in the use and scheduling of online meeting time should be explored that can help to reduce conflicts during the plenary meeting.

Online meetings provide an opportunity to use more time more flexibly. While for an in-person meeting all sessions have to be fitted into the available time people are willing to travel at once (usually roughly a week), online meetings do not have that constraint. Therefore for the planning of online meetings, there is a trade-off between the number of parallel tracks, where more parallel tracks mean more potential conflicts (as least of high-active participants), and the overall time in terms of hours per day or total days used.

As one example, it would be possible to keep most regular working group sessions within the usually five main meeting days but have some of the more conflicted sessions in other dedicated time slots. As the Hackathon for online only meetings is usually held in the week before the online plenary meeting [I-D.ietf-shmoo-hackathon], that week is already a highly active week for many IETF participants and might provide an opportunity to schedule a few selected sessions. If only one session at a time needs to be scheduled, it is easier to use a time slot that is well assessable for most people in the community in various time zones. This might work especially well for sessions that are of high interest for a large part of community, such as BoFs and dispatch meetings, and therefore hard to schedule during the main IETF week.

4.3. Chances for inclusivity and Lessons Learnt on socializing

Participation at the most recent online only meetings was rather high and had a quite stable per-country distribution, even though time zones were rotated. This indicates that online meetings support a more easy and therefore potentially broader participation than in-person meetings where participation is often fluctuating based on the location.
However, it has also been recognised that the online meeting does not provide an equivalent opportunity to socialize. The observed slight decrease in submission of new (-00) drafts, while the overall number of draft submissions and productivity seem to stay stable, might also be an indication of the loss of these interactions. The increase in interim meetings potentially compensates for these missing interactions for continuous work (or may even increase productivity there), but seems to be less adequate to spark new ideas.

None of the data observed so far can, however, be interpreted as showing a significant trend. However, these factors should be considered for the organization of future online-only meetings in replacement or addition to in-person meetings.

4.4. Experiments

Similar as for in-person meetings, it is desirable to experiment with the meeting structure. Often only practical experience can answer open questions. It is recommended to not experiment with a larger number of different aspects at the same time, in order to be able to assess the outcome correctly. It is further recommended to announce any such experiment in advance, so people adjust to changes and potentially provide feedback.

5. Acknowledgments

6. References

6.1. Normative References


6.2. Informative References

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Scheduling Online Meetings
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Abstract

This document recommends best practices when scheduling online meetings.

About This Document

This note is to be removed before publishing as an RFC.

Status information for this document may be found at https://datatracker.ietf.org/doc/draft-nottingham-scheduling-online-meetings/.

Information can be found at https://mnot.github.io/I-D/.

Source for this draft and an issue tracker can be found at https://github.com/mnot/I-D/labels/scheduling-online-meetings.

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1. Introduction

The Internet has made it possible for people to meet synchronously online, no matter where they are (so long as they have suitable connectivity). Online meetings thus enable collaboration without travel, empowering those who cannot attend an in-person meeting, either because they do not have the means, or because external circumstances (like a global pandemic) prevents it.

However, the ease with which an online meeting can be scheduled belies the difficulties that can be encountered when attempting to include a broad selection of people with different commitments, timezones, and expectations. Successfully scheduling an online meeting often requires a delicate balance between accommodating a large set of constraints with the need to make progress.

This document recommends best practices when scheduling online meetings. It does not address the many other issues encountered in planning online and hybrid meetings.
2. Considerations When Scheduling Online Meetings

When scheduling an online meeting, an organizer must consider a number of different factors that can constrain their choices and influence the outcome.

2.1. Reasons for Meeting

There are many reasons to hold an online meeting, and often the type of meeting has an impact on scheduling.

For example, a meeting might be scheduled to make a specific decision, and thus it’s important that all stakeholders have equal opportunity to participate in the discussion leading to it. Another meeting (even of the same group) might be held to gather feedback or update participants about the status of an effort, in which case scheduling conflicts might be resolved by a combination of holding multiple meetings and coordinated communication about the outcomes of each.

Successful meeting scheduling will consider the nature of the meeting. In particular, if the reasons for meeting do not require everyone to attend and there are potential conflicts, multiple meetings and/or alternative means of achieving the meeting’s goals should be considered.

2.2. Meeting Participants

Participants often have different motivations for attending a meeting. Often, people attend a meeting to witness what occurs without contributing, because they want to track the discussion and any outcomes. Others may attend and only contribute if a proposal that they object to is made. It is often only a fraction of the participants who will make substantial contributions to the discussion.

Scheduling is also influenced by the number of people who want to participate. Finding a time that is acceptable to five or six participants is noticeably easier than doing so for fifty or sixty, both because of the larger number of permutations in the latter case, and because a small number of participants is more likely to develop a working ethic that allows cooperation.
Another factor to consider is whether the set of potential participants is known during scheduling. If a meeting purports to be ‘open’ -- that is, to allow broad participation from anyone -- participation from those not represented in scheduling discussions needs to be considered, so that they are not systematically disadvantaged.

Successful meeting scheduling will assure that those who are reasonably considered to be necessary to the proceedings are able to avoid conflicts. For example, those facilitating the meeting and those presenting critical information are reasonably considered to be necessary to a meeting. Likewise, presence of key stakeholders are only slightly less necessary to a meeting’s success.

However, those necessary parties should not have any elevated privilege in terms of having their preferences accommodated. If a meeting time is merely inconvenient to them, rather than a serious conflict (see Section 2.3), that should not overcome others’ need to avoid serious conflicts.

2.3. Scheduling Conflicts

Finally, there are different kinds of scheduling conflicts. One person might consider having to commute to an office or shift another meeting or meal as inconvenient, whereas another might have a commitment to collect a child from school or provide care to a family member that is difficult (if not impossible) to change.

Likewise, there is a significant difference between the mild annoyance of joining a meeting outside of business hours (for example, at 6pm local time) and disrupting someone’s circadian rhythm -- potentially affecting more than one day of their life as they readjust -- to join one at 3am.

Successful meeting scheduling will take the nature of conflicts into account, heavily discounting participants’ mere inconvenience and prioritising those whose commitments or location make their need to avoid conflicts greater and more legitimate.

In general, a one-time conflict is not a reason to change the time of a regular meeting or a series of meetings.

3. Recommendations for Scheduling Online Meetings

Most online meetings have the potential for scheduling conflicts. The steps below help implement the guidelines above, and are intended to help schedule both single and recurring meetings.
3.1. Gather Information

Ask group participants for:

1. The timezone that they are usually participating from.

2. If they have any genuine conflicts. For example, "I need to collect my children from school at 4pm and no one else can do it".

3. If they have preferences. For example, getting up early, staying up late, avoiding family mealtimes.

"I have another meeting at 4pm on Tuesdays" is not a conflict, it is a preference. This explicitly assumes that those who participate in the meeting for work purposes should prioritise it; otherwise, successfully scheduling the meeting is much less likely.

Conflicts and preferences should be gathered privately; e.g., in an e-mail to the convener.

3.2. Find the Best Solution (if possible)

Based upon the information gathered, identify one or more candidate times for the meeting that conform to these rules:

1. No participant is expected to attend any part of the meeting between 11pm and 8am in their stated timezone, unless they explicitly state a preference for doing so, and

2. No participant has a genuine conflict in any part of the candidate time.

If no candidate times are available, proceed to one of the options in the next step.

Otherwise, choose a candidate while conforming as much as possible to any participants' stated preferences, announcing it for confirmation.

3.3. Find an Equitable Solution

If it isn't possible to find a time that meets all of the relevant constraints, a compromise needs to be found. In doing so, the considerations above can be incorporated by using one of the following methods.
3.3.1. Method I: Poll from the Least Privileged Perspective

A poll can be used to select a time for the meeting. In doing so, it is important to consider the dynamics of group behaviour, because a large number of people who have similar preferences are likely to overwhelm the needs of a minority.

For example, if ten participants are all in the US/Pacific timezone, three are in UK/London, and one is in Japan/Tokyo, a poll that has many US-friendly options is likely to result in the meeting taking place during business hours in the US, in the evening in London, and at an extremely unfriendly hour in Tokyo, because the US participants will not take others’ inconvenience fully into account.

To counteract this tendency, such polls should only include options that accommodate the needs of the least-represented participant. In our example above, that might include options early in the morning for the US, late in the evening for Tokyo, and in the afternoon for London.

This option works best when participants are in somewhat compatible timezones; if it is not possible to prevent a participant from being inconvenienced by a truly unreasonable meeting time, the following methods may be more appropriate.

3.3.2. Method II: Equalize the Pain

Alternatively, the information gathered can be used to calculate the ‘least painful’ time to hold the meeting, by assigning a ‘pain value’ to each hour of the day. For example, a meeting during local business hours has 0 pain, whereas a meeting at 3am has a very high value (e.g., 5000). By calculating the cumulative pain for attendees in each possible time slot, the time with the least collective pain can be found.

See the online tool (https://bit.ly/meeting-pain-calculator) that facilitates this. Note that it counts each timezone only once, no matter how many participants are in that timezone, to counteract the unfair weight that a large number of participants in one area can have.

This option works best for meetings that are one-off, or in a short series, and at least one participant will be truly inconvenienced by an unreasonable time. If it is an ongoing series of meetings, it might be combined with the next option.
3.3.3. Method III: Rotate the Pain

When avoiding conflicts is impossible -- for example, because a truly
global pool of participants is needed -- it is more appropriate to
rotate through different meeting times that distribute the pain, so
that at least some meetings will be convenient for all participants,
and any inconvenience is shared.

For example, if a series of three successive meetings needed to
include participants from many parts of the world, the first might be
scheduled during business hours in North and South America, the
second during those hours in Europe and Africa, and the third during
business hours in Asia and Oceania.

Note that the relative number of participants from each region does
not affect the distribution of meetings. This is because the
resulting pain is not a shared experience -- it is an individual one,
and should not be proportional to participant distribution.
Furthermore, if a meeting needs to be perceived as globally
representative, it is important that the opportunity to participate
is equal.

The downside of this approach is that the meeting time changes,
potentially causing confusion and more disruption. As a result, it
should only be used for meetings that have significant amounts of
time between them (such as a month or more).

3.4. Regularly Confirm

If a meeting is regularly scheduled or part of an ongoing series, it
is important to regularly confirm the information of participants and
the selected time, because new participants may join (or wish to),
their information might change, and daylight savings time might
change the best choice (especially when participants come from the
Southern hemisphere).

4. Normative References

[RFC2119] Bradner, S., "Key words for use in RFCs to Indicate
Requirement Levels", BCP 14, RFC 2119,
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