

## Top tips for running virtual meetings

### 1) Preparation – design the agenda differently

#### Timing

The reality is that some things take longer in a virtual meeting and some things are much quicker. Talk through the agenda with someone else and help one another imagine how long that agenda item needs. If you have a long meeting, you may want to consider doing it in two sittings with a longer break, or even two shorter sessions on separate days.

#### Board only time

If you don't already do it, consider including some trustee only time for a catch up without your executive team. Explain to the staff team that you will value the opportunity, as Chair, to share with the board how you are and how well you think the team is doing. It can also be a personal catch up time and it gives you the chance to replicate some of those conversations that might take place over coffee before a normal meeting starts. You might want to do this at the beginning and the end of a meeting. (If you do this at the beginning, it's best to still start together informally – you can put the executive 'on hold' or into the virtual waiting room/breakout room for your board only time.) If you haven't had trustee only time before do agree on ground rules first and be clear about whether it is a formal part of the meeting or not and whether it needs to be minuted.

#### Breaks

You may want to add in more breaks to the agenda than usual. Some people find online sessions more demanding than face-to-face meetings. You can put people back into the virtual waiting room, or ask people to mute and switch off cameras and come back in ten minutes. It also gives you a chance to refresh yourself and refocus and, if needs be, check in with someone else by phone about upcoming agenda items or technical issues.

#### A note on arrivals

I like to use the waiting room function in Zoom. It means people can be admitted one at a time and we properly notice when they are arriving, telling others they are joining and being ready to greet them by name. This needs some preparation – including switching on the function in settings and practising. You can also set

set Zoom 'to chime' as each new person joins the meeting. This will help ensure you don't miss anyone's arrival.

### **Papers**

As with any board meeting the right papers are key. People engage differently online, so having the right amount of information in advance will help people feel confident with online discussions. You know your board and how much information they normally need. If a lot of information is normally given verbally consider putting more information in the papers. If you have detailed papers, and some trustees like to pick at the detail during a board session, invite questions by email in advance so you can be ahead of them. It will help things go more smoothly.

### **Prepare the participants in advance**

Ensure everyone knows how to use the platform in advance. Offer some time to practise before the meeting. This gives you the chance to explain the different view options so people know how to see everyone.

It is important to be able to see everyone (or to regularly check the different views) so that you can see how people are engaging with the meeting. If you are going to record the meeting (a good option to make writing up minutes easier) let people know in advance.

### **Set some ground rules**

To ease the practicalities of the meeting you may want to circulate ground rules in advance. For example:

- keep our microphones muted when not speaking
- use the virtual 'raise hand' option to indicate when we want to speak

However, try to also go beyond the technology issues eg:

- speak one at a time
- monitor our own 'air time'
- stay off our other devices/emails to avoid distractions.

### **Have a co-host**

Appointing a co-host can be very useful if your platform allows (on Zoom you can designate another participant as a co-host). This means they have the means to mute people if background noise becomes too high or to help with assigning breakout rooms etc. It means you can concentrate on chairing the meeting and trust the technical aspects to someone else. Rehearse this in

advance.

### **Use familiar technology**

If you think there are people that might not engage with the built-in tech (like the built-in chat) use an alternative such as a meeting WhatsApp group in advance. It can provide a quick way to send things and people have a way of letting you know that they cannot hear, or that they cannot unmute. Remember, you can only make decisions if everyone is engaged fully, so pausing for people to sort out issues is important. You might want to try a tech test, ahead of your first board meeting to make sure everyone is comfortable.

### **Connecting with each other**

Include an agenda item – I call it connecting – to help ease people into the meeting. This is particularly important if you have new people joining as it will help everyone get to know each other.

Giving people advance warning of this is useful and expands what you can do. For example, invite people to share an object that has significance for them and helps to share something with their board colleagues about why they are drawn to giving time as a trustee. Or send around a one-to-one question in advance and use the 'Breakout Room' function for people to have one-to-one time as the meeting starts. (If your platform doesn't allow this, just mute microphones on Zoom and use a WhatsApp call or FaceTime in pairs).

## **2) Creativity**

During an online meeting, you may need to work a little to ensure engagement. Getting creative can help. Here are some ideas:

### **Presentations**

Using visuals is not as easy online. The online 'whiteboard' will never replace a flip chart. Sharing your screen will not feel as engaging as a large screen in the board room. However, you can still do a lot through screen sharing. Learn how to switch on the cursor pointer (in Zoom, it's in annotate) so you can show your cursor when sharing a PowerPoint presentation and make it easier to speak to specific points. Have a run through if other people are helping with the tech.

### **Pen and paper**

If you want to draw something or make notes as you would on a flipchart – just go for it. Take a quick picture and drop it into chat or send it to the meeting WhatsApp group.

## Non-verbal feedback

When online, etiquette is to keep your microphone muted to reduce background noise, you may want to get creative with visual signs. For example, some boards are familiar with hand signals to indicate to the Chair that they don't fully understand something or that things are going too quickly for them. This could easily be transferred to an online meeting. Zoom also allows you to turn on '**non-verbal feedback**' in the account settings, which includes 'Slow down' and 'Speed Up'. But you could also get creative by emailing cards for people to print out. Not everyone will like the idea and some won't use them, but if it allows one trustee to express their need it is worth it to ensure full engagement.

## Consider the gathering time

Starting the meeting well is a challenge. Arriving in an online meeting can sometimes be awkward for the first few minutes. There's no coffee to make and no easy way to greet people informally. Whereas normally things happen naturally, in an online setting you may need to be more intentional about it. Consider posing a question to get the conversation going as people arrive in the meeting. Write it up large with a marker pen and put it on the wall beside you (or use the virtual background option and post a picture). It could be a fun question, something topical, or a standard 'starter question' e.g. What's your learning question for today? When those awkward silences come in the gathering time, you can throw the question out for a response.

## 3) Attentiveness

Chairing an online meeting doesn't need to be daunting if you've taken the time to prepare and you get yourself into the right frame of mind as you begin. This means being attentive to different things. As well as being a 'Chair' you also need to act a bit like a radio host, keeping things to time and ensuring everyone gets their air time, particularly those that might hang back with the technology barriers, or those whom always wait to be called upon. You can use the private chat function to ask someone 'do you want to come in on this point?', or ensure you end each agenda item by checking if anyone else has anything to say. If you are running over time and can't give as much time as you wish, let people know and ask people to be generous to one another so everyone has the chance to contribute.

Keeping on top of things is key. I like to 'pop out' my participant list window and

chat window and position them in my eye line. This way I can see if people post text comments or raise their virtual hand. I set things to 'gallery view' so I can see everyone's facial expressions, not just the person who is speaking. Also, try and encourage all participants to have their video switched on, if possible.

#### **4) Have courage!**

Some of the ideas above might seem too much of a change from the normal face to face meeting. I say, don't worry – some people will appreciate it a lot, and most people will see the benefit of doing things differently so as to maintain a sense of community and to keep things engaging. Therefore, it is worth doing. A key message to take from these thoughts is 'don't be scared to try different things'. For example, some people will find it difficult to engage in a big online group. If you need a deeper dive into an important issue, you might want to be bold and give people the opportunity to discuss in smaller groups, even if it is not something you would normally do in a board meeting.

There is no reason not to do this – it can help people engage, share thoughts and consider what they want to say to the whole meeting. Split into groups (use the breakout room facility, or take things into quick WhatsApp video calls of two-to-four people), give people ten minutes to chat, and then come back for feedback. The feedback, discussions and decisions can still be minuted just like a normal board meeting so you have a full record of your deliberations and decisions.

#### **Consider using voting tools**

You might also want to experiment with voting. You may not normally take a vote, but when online the alternative can be to take silence (or no objections) as consent. It can be a lot more reassuring to enable everyone to see the agreement of the whole board. Use the electronic voting tools or simply get everyone to raise their hand (and ensure people are set to 'gallery view' so they can see everyone).

## Ask for feedback

Lastly, be brave about feedback. Consider taking feedback during the meeting. In Zoom, you can set up a Poll in advance. There are also plenty of free online tools you can post to the chat group or the WhatsApp group. Ask how people's energy levels are or seek feedback on pace. And, especially if this is new for you, take time for feedback at the end. Do a 'structured round', hearing from everyone in turn about how the meeting has been. What have they appreciated? What is one thing that we could do differently next time? You need to hear it. And then invite people to send any further thoughts – which might occur to people later, by email.