Nonprofits:

What You Need to Know About Hosting Effective Virtual Meetings

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In an ideal world, every board member would be able to attend each of your meetings, but your members are busy people with schedules that won't always align with your plans. When conflicts arise, you can still have 100% attendance by facilitating meetings with technology. By allowing some members to attend remotely, you can include members who can't get away, who are traveling for work or on vacation, or who are otherwise unable to physically attend.

Some board members—particularly those who are well-known in the community and are established businesspeople—serve on more than one board. They have full-time jobs and other responsibilities, so providing them with a way to attend your meetings ensures you get the full benefit of their involvement. A **virtual meeting that allows some attendees to participate from a distance** can give you the attendance you need to function and get things done.

While virtual or remote meetings may not be your ideal, they can help you move forward if you have difficulty scheduling a time for all members to attend, but you need to make decisions on key initiatives. The right technology, a sound approach to meeting management, and a commitment to engaging all members can help you make the most of virtual meetings.
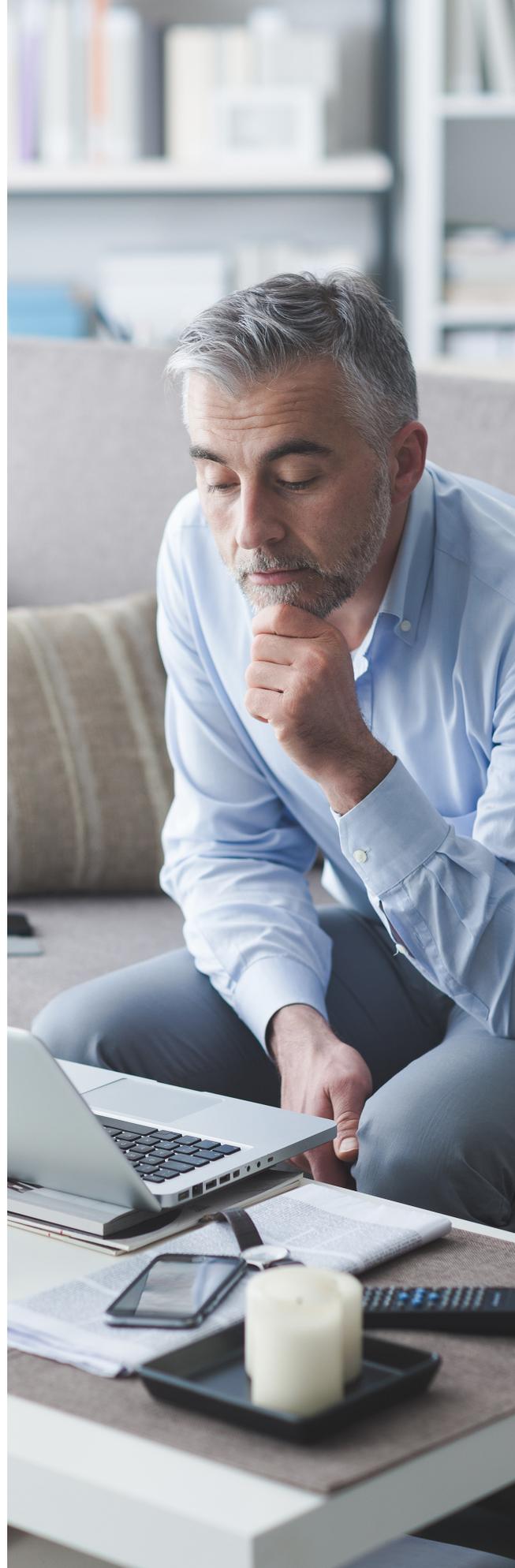
What is a Virtual Meeting?

Virtual meetings can happen a couple of different ways. On one hand, a virtual meeting can occur when most board members are physically present, but one or more members use technology to be present. On the other hand, some virtual meetings require all members of a board to use technology to meet. In either case, members use a computer or other device to join the meeting, so they can listen to presenters, see speakers, and add their own insights despite being off site. A computer and internet connection are needed, along with audio and/or video conferencing technology to facilitate the process. A virtual meeting allows virtual members to see and hear what is going on instead of reviewing written notes after the fact. Your board and organization can get the full benefit of your members' knowledge and experience by offering virtual meetings as an option.

Making the Most of the Virtual Meeting Process

You may prefer every board member to be at each meeting in person, but when that is not possible, you can take steps to make sure your **agenda runs smoothly**. That said, a virtual meeting that includes members who just passively listen won't help you accomplish your goals. To be truly effective, you need members to participate fully and to share their insights, so their voices can be heard by all.

Since virtual meetings differ from in-person discussions, there are some specific details you'll need to adjust to and know before the meeting begins. The following information details what every executive director or board chair needs to know about virtual meeting management.

Ask Whether Your Organization Allows Virtual Meetings

One of the first things you need to know is if your organization can conduct virtual meetings at all. Some boards have specifically outlawed virtual meetings in their bylaws, while others do allow virtual meetings. Sometimes state law prohibits them entirely. You'll need to check two different sets of regulations to confirm you are able to allow members to participate on a virtual basis:

- **Your own bylaws and governance.** Review the terms of your board governance to be sure that virtual meetings are allowed. If your own governance does not permit virtual participation, you won't be able to use this method. If your board governance does not specifically mention virtual meetings, you may be able to run them—speak with your board chair and legal counsel to understand any ambiguous rules. If your governance specifically allows for virtual or remote meetings, you're on solid ground and can continue with the process.

- **The laws of your state and location.** Your home state or location may have some specific rules regarding nonprofit meetings and virtual participation. You should review any legal ramifications involved with virtual meetings. Most states do allow virtual meetings for nonprofit boards but checking local regulations in your state will give you peace of mind before moving forward.

By taking the critical first step of reviewing the governance of your own organization and the laws of your state, you can immediately determine if you can legally include board members using virtual

Optimize your Agenda

When board members are physically present, you can keep them engaged and **move the agenda along** relatively easily. Often, you can help members stay engaged by providing food and beverages, maintaining eye contact, including members in the conversation, and passing out paperwork and other items.

When you have remote attendees, they miss out on all of the activities that help them stay connected. To overcome this, your discussion of agenda items in a virtual meeting should be concise but conversational, focusing on essential talking points and bringing virtual members into the conversation regularly. You should also break up the agenda into segments to allow time for discussions about specific items, assisted by multimedia visual aids and imagery. A steady stream of chatter could cause your virtual members to check out mentally. Screen sharing, videos, images, and different camera shots and

views allow the virtual guests to feel like they are in the room—and that helps them stay connected and involved.

Incorporating variety, move your most important points to the beginning of the meeting, to take advantage of your virtual members' initial interest. A member that would never consider physically leaving a board meeting might feel more free to depart from or check out from a virtual meeting, so hit the important things up front to be sure nothing crucial is missed. Your virtual attendees should be able to **access the agenda early**, so they can prepare notes on key topics and address the group when they need to. It is also important that the board chair brings virtual members into the conversation by asking for their opinions on specific agenda items. Asking for virtual members' opinions will keep them focused and help them participate in the meeting.
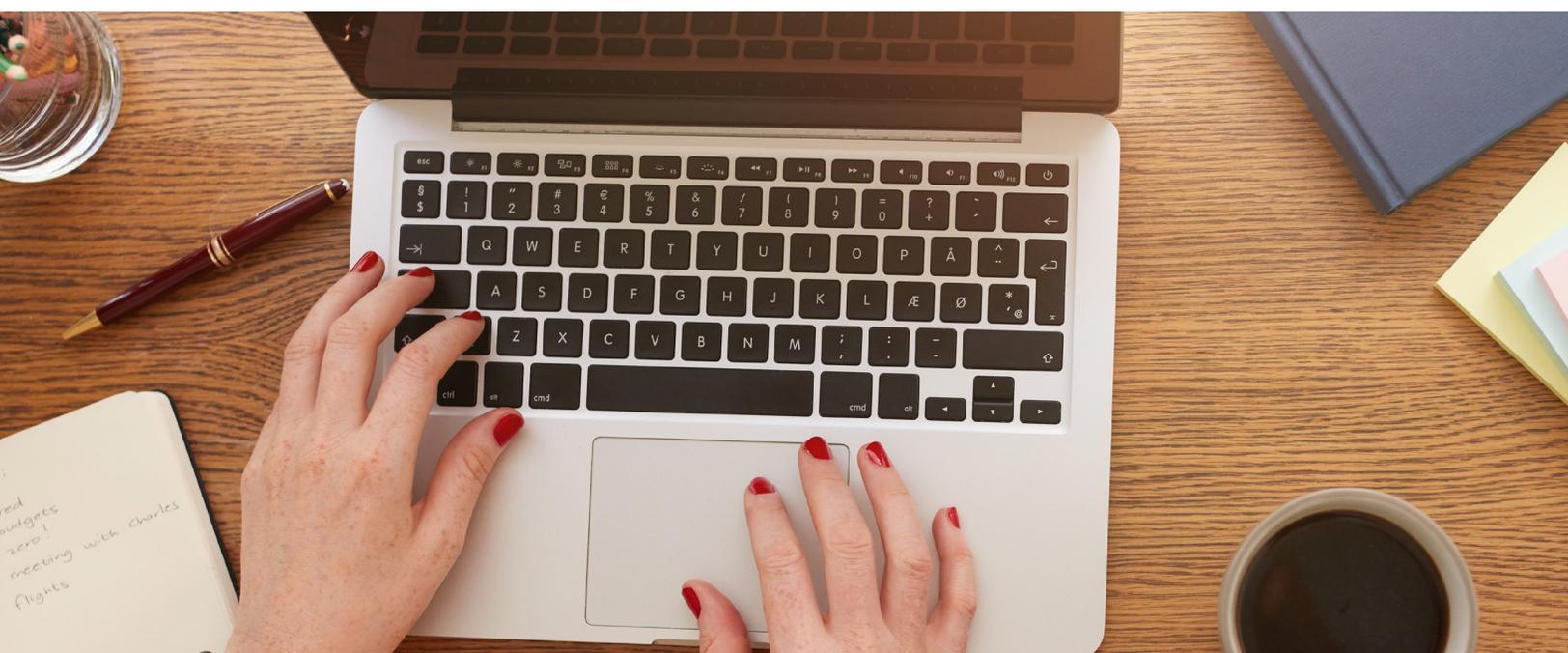
Conduct Effective Virtual Meetings with Remote Members

Make the most of virtual meetings by facilitating engagement, interest, and participation. Our **full guide to virtual meetings** highlights some of the most important steps you can take to manage the meeting. You can incorporate the tips below as well.

- **Check and double-check technology.** If your virtual members can't see or hear you (or can't be heard in the meeting location), they won't be able to participate at all. Check technology before the meeting begins to be sure you can see and hear each member and that they can hear you. If you can't communicate effectively, you may end up missing out on important insights. Your own location needs to be up and running well, and each virtual location and member needs to be able to connect and to see and hear every person in the meeting. If you wait until the last minute, you could end up with board members who can see, but not hear the meeting—or who can't participate at all.

- **Welcome everyone—and allow for small talk.** Make sure you verbally take attendance and show each board member—both those who are physically present and those who are virtually attending. This way, everyone knows who is involved in the meeting, and it makes them feel welcomed and engaged. Including an icebreaker can allow time for members to get used to the technology, especially those who are using it for the first time. Starting with small talk or an ice breaker will aid in adjusting to the meeting format in a low-stakes manner. Moving forward, mention members by name regularly to make sure they continue to participate. Additionally, be open to screen sharing and sharing the camera so all voices can be heard.

- **Prepare notes and agendas early.** It is always important to make sure that everyone can **easily track topics and discussions**, but if you have remote attendees, it is even more critical. Those members who can't be there in person must have access to all the details and information they need to participate fully in the meeting.

- **Assign key roles.** Your own team can help facilitate the meeting, so it runs smoothly. If you try to do everything yourself, you could end up attending to matters like time or engagement—and miss out on key parts of the agenda. Ideally, you should delegate some roles to other trusted team members. You should have someone to lead the meeting who can focus on the agenda, someone to track time, someone to prompt virtual members' participation, and someone to do tech support, just in case. When you have assistance in place, your meeting can have optimal participation and run smoothly.

- **Include remote participants.** Make sure you mention virtual participants by name and ask for their insights. They're on the board because you value their insights, so ask for information and details as you work through the agenda. Remote members will stay engaged and involved if you make an effort to include them. If they are left to be passive observers, they may tune out entirely. Put their projects on the agenda, and they'll not only be encouraged to participate, they'll also feel like part of the group.

- **Use board meeting software.** Board software is designed with meetings and management in mind, so using this **powerful technology** as part of your meeting process will allow your meeting to run smoothly and get as much buy-in and involvement as possible. With the right tools, running a virtual meeting is as easy as running one in person in your own board room.

Are Virtual Meetings Right for you?

There are both benefits and drawbacks to virtual meetings. Assuming that you are permitted to run a virtual meeting by both your own governance and the laws of your state, you should consider the following pros and cons as you decide if virtual meetings are right for you:

PROS OF VIRTUAL MEETINGS

- You can maintain a schedule, even if your members can't physically attend the meeting.

- You can allow everyone to attend, even if circumstances dictate that they cannot show up in person.

- You won't have to delay or miss out on making important decisions because members are unable to attend.

CONS OF VIRTUAL MEETINGS

- Remote members may not feel as engaged or involved and could tune out during the meeting.

- You need to take extra steps to facilitate the meeting, including shaping the agenda and incorporating participation from virtual members.

- You'll need to work with more technology to get the meeting going and to allow for full attendance.

Make the most of the virtual meeting process, and you won't have to worry about obstacles that make it hard to attend meetings. Just remember—the most important thing about virtual meetings is to make them meaningful. In order to do that, you will need to think creatively about how to draw participants into conversation, especially those who attend the meeting virtually.

Virtual Meeting Tools Can Help

If you're looking for meeting tools that facilitate virtual meetings, there are a lot of options. You can always use a combination of Zoom, Google Docs, Powerpoint, and whatever meeting tools board members are familiar with.

However, if you'd prefer to streamline everything for your virtual meeting into one tool, check out **Boardable Meetings with Video**.

This tool allows you to share documents, take minutes, and conduct video meetings, **all in the same application**. The elimination of switching between tabs and searching for documents helps all your attendees stay more focused and productive.
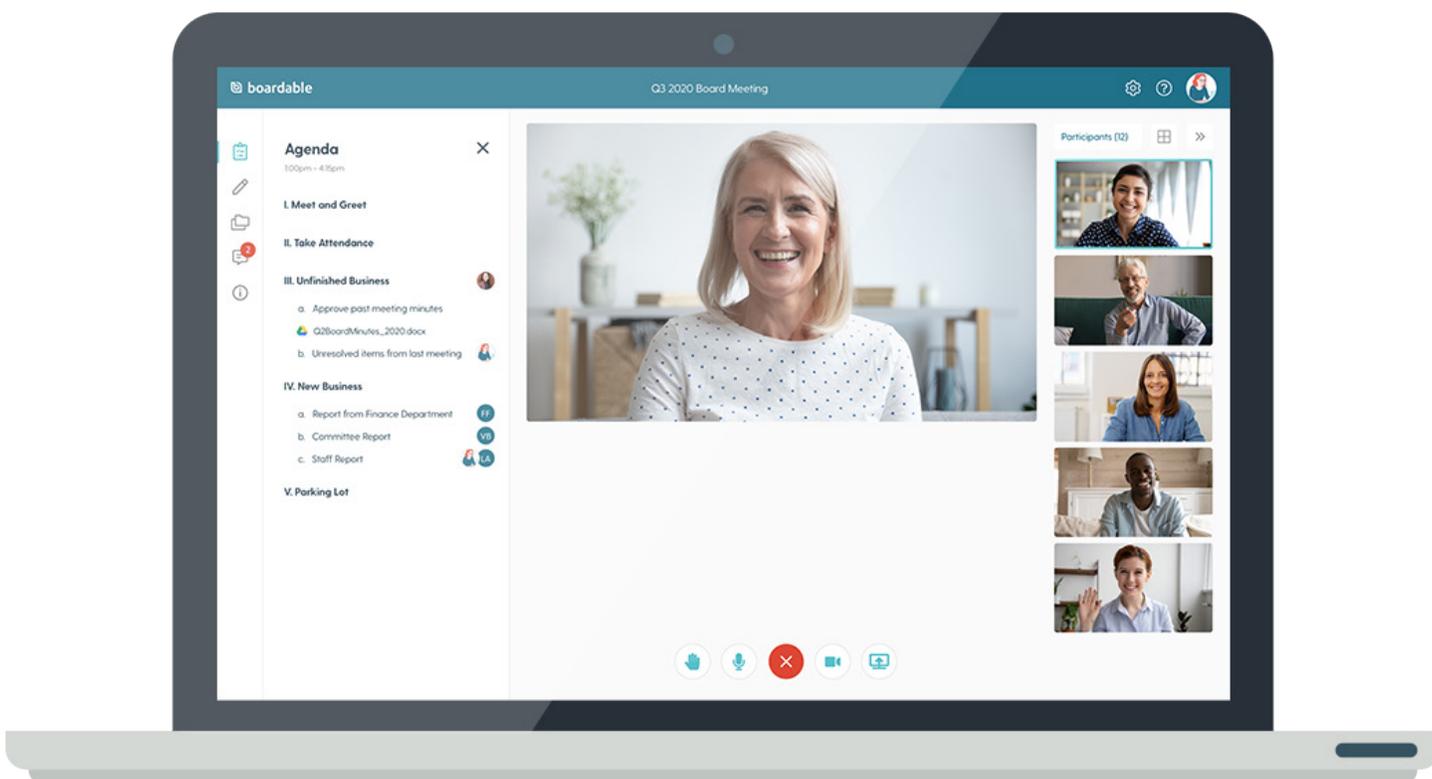
Try it out with a free trial (no credit card or commitment) at **boardable.com**.

About Boardable

Built by nonprofit leaders, for nonprofits. Boardable empowers you to work more effectively with your boards and committees. We know the frustration you feel (and the hours you lose) just from organizing a meeting via email, phone, and text. We've lived it. We're from the nonprofit world, too. After looking around for the right tool but not finding it, we decided to build it. Boardable is a software platform that centralizes all communication between you and your board. Find the best meeting times, securely store all of your documents, archive discussion threads and more—all in one place.

For more information, to schedule a demo, or to sign up for your FREE trial (no credit card or commitment) at **boardable.com**.