

Essential tips for effective online meetings



Moving your meeting online presents special challenges. Here are our best tips for success.

- 1) **Make sure you can meet this way.** Refer to state law and your bylaws to make sure you can meet by telephone or videoconference. *Robert's Rules of Order Newly Revised, 11th edition*, discusses this issue on pp. 97-99. According to Robert, telephone, electronic or virtual meetings must be authorized in your bylaws. For local governments, if your state has issued an order allowing you to meet remotely, the order supersedes Robert's Rules. For nonprofits, it's a different set of issues. Read our article [When COVID-19 cancels your meeting](#) to learn more.
- 2) **Choose a platform.** We list some of them in our article [Free or inexpensive video conferencing resources and services](#). There are also free telephone conference services available. All of these platforms have their quirks, so once you've chosen the platform, you'll want to invest some time in getting familiar with it. Schedule a test drive for the members of your group. Craig Freshley's article, [Zoom Meeting Basics](#), will help people who are puzzled by the way the buttons jump around the page.
- 3) **Make sure everyone can hear and be heard.** This is the fundamental requirement for a virtual meeting. The ability to discuss and deliberate on the issues is vital to the democratic process. Groups can't meet on Slack or similar group messaging platforms ([see our article](#)).



- 4) **Give adequate notice of your meeting.** You must let people know, enough in advance, when, where and how the meeting will be held. Check your authority documents for this. Sometimes it's adequate to give notice by email, but not always. In an emergency it can be hard to remember these details, but they are critical.
- 5) **Prepare a smart agenda.** A remote meeting can't cover as much as an in-person meeting. Review your topics and schedule only items which truly merit attention. Ask people to read reports and other information in advance. We also suggest that you consider changing your "Order of Business." The standard "Order of Business," in which new business comes at the end of the meeting, means that members sometimes won't have the energy that new topics require. We recommend placing key items early in the meeting. Read [What are special rules of order in Robert's Rules](#) to learn how to do this—it's easy!
- 6) **Add times to your agenda.** Indicating how long each item is expected to take helps keep everyone on track. We also recommend adding the words "All times approximate," to acknowledge the reality that you likely won't follow the timing precisely. As chair, you must keep an eagle eye on the agenda and do your best to keep discussion to the limits suggested. The downloadable PDF in our article [Agenda in Robert's Rules](#) contains sample timed agendas.
- 7) **Prepare your room for the meeting.** Everyone needs to put some thought into where they will be during the meeting. Choose as professional-looking a room as you can arrange. Dress appropriately and comfortably. Check that you have adequate lighting. Test out your microphone and camera. Minimize background noise. You don't want to have a barking dog, the front doorbell, or your cell phone intrude into the meeting. Don't chew gum on camera!
- 8) **Prepare yourself for the meeting.** It's essential to invest in the meeting ahead of time. Review the materials, study the agenda, marshal your thoughts in advance. Dress comfortably and appropriately. Plan to concentrate on the meeting and refrain from checking your email, no matter how tedious it may feel. As William Vanderbloemen says, "Virtual meetings require vigilant and singular attention—almost more focus than if you were in person."
- 9) **The chair must control the meeting.** As explained [throughout our materials](#), the chair runs the meeting as the servant of the group. Once the group has adopted rules and the agenda, the chair has the responsibility of making sure that the meeting runs accordingly. This means that the chair has to be a "benevolent dictator." It isn't easy to do this! However, you will serve your organization well when you do.
- 10) **No one may speak a second time until everyone who wishes to do so has spoken once.** This is a fundamental guideline that ensures fairness in discussion. It's so different from our ordinary, conversational style of discussion! Yet it is critical. The easiest way to do this in a remote meeting is to use the "round robin" method. The chair prepares a "speaking

chart” listing everyone’s name, and then calls on everyone in turn. People may pass, and speak at the end of the round. We recommend that the chair speak last. If a second round is necessary, that’s fine. You can learn more about the round robin [in this article](#). Here’s a sample of a speaking chart.

SPEAKING CHART

Name	1	2	3	4	5	6	etc.
Andre							
Conner							
Ellen							
Jasmine							
Keiko							
Kim							
Maria							
Omar							
Pat							

A speaking chart is very helpful in a hybrid meeting, where some members are there in person and some are on the telephone. It’s all too easy to forget to call on the people on the phone.

- 11) **No one can dominate the discussion.** If your members decline to use the Round Robin, it’s still essential to prevent anyone trampling on the rights of others. In this case, the chair must be strict in recognizing people. You may want to use the “raise hand” function for this purpose. Everyone must state their name before speaking.
- 12) **Don’t allow interruptions.** In everyday life we interrupt each other all the time, but it’s forbidden in Robert’s Rules. Robert even says that the chair may not interrupt a member just because the chair knows more about a topic than the member! The exception is when an important rule is being broken, so the chair intervenes, or a member makes a Point of Order.
- 13) **Don’t allow inappropriate remarks.** Certain kinds of remarks are inappropriate in your meetings because they are not germane (relevant). Read [Inappropriate remarks on local government boards](#) and [Inappropriate remarks on nonprofit boards](#). The chair must stop them when they occur, or a member may raise a Point of Order.
- 14) **Members may use Point of Order and Appeal if they disagree with the chair’s decision.** When the chair makes a ruling or a decision that seems wrong to a member, they can raise a Point of Order, which can be Appealed. In our view, these two motions are critical to the democratic process, as we explain in [Point of Order and Appeal are the heart of democracy](#).

- 15) **Take formal votes.** Sometimes in nonprofit boards, there's a tendency after discussion seems finished to assume the decision and move on. Don't do this! The chair must state explicitly what has been agreed upon, and members must vote to approve it. You can use a voice vote on a small board, or a roll call vote may work better. (In some states, roll call is required). We don't see any way to use secret ballots in an ordinary online meeting. Here's a sample of a voting chart.

VOTING CHART

MOTION	#1			#2			etc.
Name	Aye	No	Abstain	Aye	No	Abstain	
Andre							
Conner							
Ellen							
Jasmine							
Keiko							
Kim							
Maria							
Omar							
Pat							

Read Jim Slaughter's article, ["Let's Have Our Meeting or Convention Online!"](#) for more helpful information. As always, nothing in this article constitutes legal advice. Consult your attorney as part of your due diligence.

We are engaged in a large experiment in virtual reality right now! Please share your experience and [let us know whether these tips are helpful](#). We wish you the best of luck with your online meetings.

Essential tips for effective online meetings

© Jurassic Parliament 2020. All rights reserved.

TERMS OF USE

This article is provided for personal use. The user may not modify, publish, license, create derivative works from, transfer or sell any information or services contained in this publication or obtained from our website, or use the content of our website for public or commercial purposes, including any text, images, audio or video, without the written permission of Jurassic Parliament. Jurassic Parliament reserves the right to update our website at any time without notice to you. If you would like to use or quote this material for any purpose other than expressly as authorized herein, contact the Jurassic Parliament office.

DISCLAIMER

This material is provided for general educational purposes. Jurassic Parliament makes no representation about the suitability of the information contained in the documents and related graphics published as part of these services for any purpose. All such documents and related graphics are provided "as is" without warranty of any kind. Jurassic Parliament hereby disclaims all warranties and conditions with regard to this information, including all warranties and conditions of merchantability, whether express, implied or statutory, fitness for a particular purpose, title and non-infringement. Nothing written here constitutes legal or business advice. Readers with specific questions are advised to seek an appropriate credentialed authority to address their issues.

P.O. Box 77553, Seattle, WA 98177

TEL 206.542.8422 | EMAIL info@jurassicparliament.com

www.jurassicparliament.com