



# GUIDELINES FOR A VALUABLE VIRTUAL GATHERING

## HOW TO USE THIS

1. Time for the E.D. and the Board Chair to read this post [LINK TO POST], grab the organization's calendar with internal and public meetings, and review that calendar through the lens of this resource
2. Come up with a list of discussion questions
3. Bring together the Exec Committee and Senior staff to talk through those questions and together, develop a plan. Not everyone will agree with the entire plan but the organizational leadership will feel heard
4. Start making decisions
5. After the first virtual gathering you try, please debrief. I bet with careful attention to what worked and what could have worked better, you could introduce video conferencing as an added tool in your gathering "tool box"

## IT'S ALL ABOUT THE GOALS

Frankly, valuable gatherings are always about the goals and we forget that. We meet because it's what we do. A virtual gathering demands intentionality about the WHY. That "why" needs to be clear, present and repeated throughout the virtual gathering to hold attention.

## THE NONPROFIT MEETING EQUATION

Here's what I think we should be shooting for with all staff meetings and with board meetings. It's my simple equation:

$$\text{INFORM} + \text{ENGAGE} + \text{ENRICH} = \text{IGNITE}$$

The goal with staff and board meetings is to ensure that folks leave reminded of the importance of the work, of their place in it. Further they should feel armed and ignited to be a vocal ambassador for the organization.

As you will note in my equation, "inform" is the most passive word. And when you think about typical gatherings, how often do you get past "inform?" You can be honest. Not that often.

No nonprofit meeting should stop there but a virtual meeting absolutely can't. You'll lose folks 10 minutes in and never get them back.

## How To “Inform” Virtually

- No duplicative presentations that just rehash the reports you are sure are not read
- No single talking head reporting out. It doesn't work. Think about how quickly you lose focus watching TV if there is a long monologue or a new anchorperson droning on.
- Powerpoint can be really helpful (more on technology below) but only if you use it with some creativity. Photos, embedded videos. It will take more time and energy but consider this. You're not traveling and if the extra time means they will be better ambassadors, it seems worth it.

## How to “Engage” Virtually

- Small group work is a key to engagement. Zoom offers this. You need this, especially when tackling substantive strategy questions.
- Strong facilitation can make or break this. If your board chair doesn't fit the bill, put that elephant in the middle of the room and see if you can get the right person for the role.
- Use pre-readings - not just reports - but enriching pieces about leadership or about the sector. These prime the pump for thoughtful conversations. And shared readings do create cohesion (think book clubs).

## How to “Enrich” Virtually

- Outside Guests - Virtual meetings are well suited to outside experts. A city official, a program officer to talk about trends in the sector, a colleague E.D. who can speak to collaboration. Virtual meetings demand that we see different faces and especially when travel is limited, it can really work well for an outside guest.
- Touch the Work - Allow your board to really connect with the work in some way so that they can be reminded of its importance and inspired by it. Could be as simple as an iPhone video or really informal conversations with a volunteer or a client. Or allow senior staff to strut their stuff at a board meeting with a deep “day-in-the-life” look at the work. How about board members being given a first person description of a hypothetical client and asking each to introduce themselves in the virtual meeting as that client. Then have a discussion about the lives of your clients. It will bond the group and ensure that everyone speaks.

## LOGISTICS

### Pick Zoom For Your Room

From what I've seen, nothing comes close in terms of quality, screen sharing, white boards and did I mention quality. The other great thing is that you can set up breakout rooms with [Zoom](#). If we are in the business of social distance for a while, the upgraded version is critical. \$15/month for Pro Level and for an additional \$40/month, you'll have access to other more sophisticated features like the ability to create virtual breakout meetings - this feels very valuable.

The question you need to ask is what does an in-person board meeting end up costing the organization? And what does the lack of interaction cost you in terms of productivity?

As for the length of the meeting, it should be driven by the material that needs to be covered. But folks need a real, substantive break every 2-3 hours.

### Meeting Facilitation is Everything

You won't be called a "host" for nothing. Welcome folks, begin casual banter right away to warm up the room. And throughout the meeting, you need to be even-handed about how much each person has spoken. And who hasn't. Set ground rules (see below) and get the group to agree to them before the board meeting begins.

## Ground Rules

The person running the meeting can certainly suggest a few that have worked historically and then ask for others.

- What are your expectations of participants (no multitasking or mute to chat with your spouse)
- Secure consensus on how to hold members accountable to the ground rules
- Commit to civility and respect (can be stronger in person)
- Commit to real breaks, not just of the 5 minute variety
- Ditto - something you can say or better still do to illustrate that you agree with what was just said

- Make sure all attendees keep themselves on 'mute' and then raise your hand to create a queue and avoid interruption. Zoom has a 'waving' function that can be monitored or participants literally can just wave and the facilitator can keep track.

## THE BOTTOM LINE

It is possible to create a virtual gathering that is engaging, informative, enriching and inspiring.

But a gathering that delivers should be designed intentionally with an eye toward how to keep attendees engaged, allow for the opportunity to have a voice, and be enriched. And it can ignite or re-ignite the enthusiasm of the participants.

Can you imagine what would be possible if we invested that kind of intention and creativity into our in person meetings? Oh the places we'd go....

