

Basic Virtual Meeting Procedure Tips

1. Make sure virtual meetings are legally permissible in your State. Sometimes it may require a Bylaw amendment, and/or written policy to maintain the integrity of the meeting and voting process. According to Robert's Rules of Order Newly Revised, 11th edition, virtual meetings must be authorized in your bylaws. For local governments, if your State has laws permitting you to meet remotely or if your Governor has issued an Executive Order permitting remote meetings, that will supercede Robert's Rules.
2. Choose a platform for your virtual meeting and a platform for your virtual/electronic balloting and schedule a test drive for the Board. Once those platforms are tested out by the Board, it is time to test drive the virtual meeting platform with the membership. Each platform is a little different and has its own nuances so once you select one, invest your energy in familiarizing yourself with that platform.
3. A fundamental requirement for virtual meetings is to make sure everyone can hear and be heard.
4. Give adequate notice of your meeting and clear instructions on how to log in to the virtual meeting and, if using a separate electronic balloting platform, direct them to that platform's website and/or provide clear instructions on how to use the balloting platform.
5. Prepare a "smart" agenda. Add times to your agenda items. For example, if you scheduled voting to take place on a virtual platform from 6:30 to 6:45 that means that you need to be finished with all agenda items that are ahead of the voting time before 6:30. Once 6:30 rolls around, the voting commences. At 6:45 p.m., voting closes and the tally is made through your selected voting platform. Then you can move on to the next agenda item.
6. Dress appropriately and comfortably and check your lighting. Test out your microphone and camera, at least 15 minutes in advance and make sure everything is updated well in advance of your scheduled meeting. Minimize background noise.
7. You must have a designated "Chair" who maintains control. That means that if the President is being assisted with a virtual meeting then he/she will need a co-host to assist with keeping the meeting on track and ensure participants do not become unruly (i.e., he/she will make sure all participants are muted except for the participant who is currently recognized).
8. No one may speak a second time until everyone who wishes to do so has spoken once. When someone wants to make a comment they must raise their hand and be called upon by the Chair. The Chair, with the assistance of his/her co-host will be able to go around the room to ensure that everyone who wanted to speak has spoken in that round of comments before a person is called on again to speak.
9. As the Chair, do not allow inappropriate remarks or interruptions.
10. Don't assume a decision of the members. You can use viva voce by calling out for ayes and nays. If you hear no nays and/or the ayes clearly have it, you can call the motion carried. Alternatively, you can have the participants use the "raise hand" function and have the co-host assist you with counting the hands in favor and those against.
11. Always use the cloud recording feature available for virtual meetings. This will assist the Secretary with transcribing meeting minutes.