



"VIRTUAL" BOARD MEETING BEST PRACTICES

TIPS AND BEST PRACTICES

Virtual meetings, like in-person meetings, still require preparation. Choose an area that is free of distraction so that you can concentrate on the meeting's objective.

OVERARCHING APPROACH

CLEAR COMMUNICATION	<ul style="list-style-type: none">• Use your existing method of communication to let board members know what to expect as you transition to a new way of convening.
SET THE STAGE	<ul style="list-style-type: none">• While this transition is necessary now, in the time of COVID-19, putting effective, secure virtual meeting practices in place has long term benefits.

TIPS TO MAXIMIZE ENGAGEMENT

VIDEO	<ul style="list-style-type: none">• Offer a video option (engagement is enhanced when video is added to the conference call);
SHARE YOUR SCREEN	<ul style="list-style-type: none">• Remember to share documents that are being discussed with the other participants;
BOARD PORTAL	<ul style="list-style-type: none">• Board Portal products save time because all relevant documents and board information are centralized in one location;
ATTENDANCE	<ul style="list-style-type: none">• Make sure to identify who is in the meeting. Give participants the opportunity to introduce themselves if time permits;
SEGMENTED FEEDBACK	<ul style="list-style-type: none">• Ask subsets of participants if they have questions;
DIFFERENT VOICES	<ul style="list-style-type: none">• Give other participants the opportunity to conduct part of the meeting if appropriate.

Do this BEFORE your first virtual meeting -> Test audio/visual equipment

RECOMMENDED FREE RESOURCES

CONFERENCE CALLS	<ul style="list-style-type: none">• FreeConferenceCall.com
VIDEO CONFERENCE	<ul style="list-style-type: none">• Zoom and Zoom for Beginners
NONPROFIT BOARD PORTAL	<ul style="list-style-type: none">• BellesBoard