



Sustainability Education 4 Nonprofits

TIPS AND TECHNIQUES FOR IMPACTFUL VIRTUAL BOARD AND COMMITTEE MEETINGS

A. Michael Gellman (CPA, CGMA)
March 1, 2021

1. Adjusting Meeting Scope and Content for Virtual Formats

- Assume that traditional in-person meeting formats will not work in a virtual setting – shift your focus and reimagine new formats that are better suited to meeting via phone and video conference.
- Treat virtual meetings as an opportunity to expand access, grow engagement, and be innovative.
- Assume that time allotted for virtual meetings will be half of what it was for in-person meetings, and plan accordingly to:
 - Prioritize critical meeting goals and objectives;
 - Use consent agendas when appropriate to save time for the most critical items;
 - Rotate meeting agendas to prioritize the most time sensitive items;
 - Rotate manager and staff reporting by department and/or by activities with important timing considerations;
 - Condense the content for each agenda item as needed to fit in a shorter meeting.
- Consider increasing meeting frequency in light of time saved by having shorter meetings with no travel time.
- Give extra thought to meeting agendas:
 - Condense the meeting agendas and keep them tight;
 - Make adjustments to the agenda to align with the meeting leader's unique style and engagement approach, while still covering key meeting goals;
 - List individual agenda items in an order that will improve meeting flow, reduce distractions from micro-management issues, and increase attendee interest and connection to issues requiring their input and approval;
 - Consider whether to use “top down” (most important first) or “bottom up” (least important first) approaches and recognize that this choice can change from meeting to meeting.

Page 1 of 3

© 2021 A. Michael Gellman (CPA, CGMA)
mgellman@fiscalstrategies4nonprofits.com

www.se4nonprofits.com
www.fiscalstrategies4nonprofits.com

THIS DOCUMENT IS INTENDED FOR GENERAL EDUCATIONAL AND INFORMATIONAL PURPOSES ONLY. PLEASE DO NOT TAKE ANY ACTION OR REFRAIN FROM ACTING ON THE BASIS OF ANY INFORMATION CONTAINED ON THIS DOCUMENT WITHOUT RETAINING AN ATTORNEY OR ACCOUNTING PROFESSIONAL TO ADVISE YOU ON THE PARTICULAR FACTS AND CIRCUMSTANCES AT ISSUE.



Sustainability Education 4 Nonprofits

- Give extra thought pre-meeting preparation:
 - Draft and circulate meeting agendas earlier than usual;
 - Circulate draft agendas in advance to key leaders (Board Chair, Committee Chairs, Staff Liaison, etc.);
 - Insist on pre-meeting “walk throughs” with the organization’s thought leaders (Treasurer, President, Chief Executive Officer, Project Managers, etc.);
- Give extra planning to design, layout, content and display of financial and other meeting specific reports – old reports might not work in a virtual setting:
 - Avoid a lot of separate reports;
 - Prepare a meeting packet in PDF format with pages numbered so only a single document must be opened during the meeting;
 - When you plan to virtually share documents during the meeting, make sure the documents will be easy to read in a screen-sharing format and practice sharing documents before the actual meeting starts;
 - Consider reducing content to the most critical information.

2. Managing Attendee Engagement

- Be aware that some attendees react and behave differently in a virtual setting, and extra planning may be necessary to manage attendee engagement.
- Consider whether to track participation and whether this is an objective.
- Be aware of who tends to be actively engaged and who does not.
- Be careful about calling out individual Board and Committee members to engage them (it can be considered an unfair tactic to call on someone at the end of a meeting, e.g. “Bob, you have been very quiet, do you care to add anything?”).
- Be artful like an orchestra conductor, weaving member engagement in and out as the musical score progresses. Plan natural breaks for discussion for important agenda items. Consider using breakout sessions where appropriate. Practice managing discussions and develop key phrases to discourage overly long discussions while avoiding turning your meeting into a long uninterrupted lecture.
- Be aware of individual attendees that are overly engaged and be tactful about how you manage them during the meetings – always practice good meeting management and etiquette. Develop a few go-to phrases that are not threatening such as “that is a good point but let’s get some input from others” or “interesting comment, can we please entertain other concurring or dissenting comments.”



Sustainability Education 4 Nonprofits

3. General Tips for Meeting Hosts

- Explore the features of your virtual meeting software platform, as they all operate differently. Take full advantage of features such as chat functions, raised-hand feature, polling, breakout rooms, screen-sharing, etc. to make the meeting more interactive.
- Test and refine your sound, lighting, and camera setup:
 - Consider investing in a separate microphone and/or webcam, as the quality will be far superior to what is built into your computer;
 - Use earphones or earbuds to avoid feedback from meeting audio;
 - Make sure your room has adequate lighting, and consider placing a lamp or ring light nearby but not in direct sight of the camera (a lighting source should generally be positioned toward your face and slightly off to the side);
 - Position the camera so your eyes are lined up (not looking up or down) and your head and shoulders are centered (not too close or too far away).
- Consider using a coordinator or host to moderate/monitor questions from attendees.
- Always sign in early before attendees arrive.
- If possible, engage your early arriving attendees before the meeting starts.
- Be respectful of everyone's time: plan to start on time and end on time. Running over or finishing substantially early can leave a negative impression.
- Plan out the meeting with benchmark times to gauge whether you need to speed up or slow down.
- Design a thoughtful conclusion with appropriate amount of time allotted.
- Encourage meeting attendees to contact you for follow-up questions and requests for additional information.