Suggested Best Practices for Virtual Meetings *

More and more committees are finding it useful to use electronic tools to conduct virtual committee meetings. Zoom has become a popular tool for these meetings. Once a committee accustoms itself to the use of Zoom, meetings can be conducted quite effectively. This document suggests best practices with the intention to support committees who choose to use this platform.

Training your committee on the technology: Consider holding a tech practicum during an in-person meeting. Everyone gets on Zoom, and the committee scatters to different locations within whatever your meeting venue for a 5 minute Video Conference. If you are using google docs, everyone logs into the document, and then practices using the editing/reviewing/ commenting features your committee is going to use – perhaps for minutes, perhaps for writing and editing documents between meetings. Doing this practicum in the flesh provides moral and technical support for people who are anxious (or inexperienced) about new technologies. It is important to have clear, patient and non-anxious leadership during this practicum. Friends who are comfortable with the technology can be mentors to others who are not. Decide whether you are as a committee going to use the chat feature (so you can practice) or the hand-raising feature on Zoom, and then practice, practice, practice!

Managing low bandwidth. Sometimes your computer will let you know you do not have adequate bandwidth to participate fully in the call. There are several ways to manage this:

> Remain solely on your computer and turn off your video.

Or

> Call in on your telephone and turn off the audio on your computer.

Each has advantages and disadvantages. If you turn off your video, it allows the audio portion of the call to proceed and not be disrupted by the insufficient bandwidth. But, you loose the advantage of being able to see and be seen. Some Friends feel that the audio is clearer using a cell phone. It is really important if you do a combination of phone & computer to make sure the video conferencing software knows that you are using telephone rather than computer audio. You need to enter the participant number to associate your phone call with the computer participant.

Audio from either computer or phone is generally markedly better through headsets (earphone and microphone combination). "Hands-free" telephone audio often significantly degrades audio and general meeting effectiveness for all participants.

Some tips for better video conferences:

1. **For the Clerk:**

   Come prepared. In the days or weeks before the planned call, use a Doodle Poll to find a time that is convenient for at least half of the committee. Suggest times that will start the call between 8am and 8pm; if you are doing a call across multiple time zones make sure to take that into account.

   Be prepared. Request that any suggestions to the agenda be sent to you at least 4 days prior to the meeting. Be ready to finalize and send out the agenda three days before the meeting. Make sure the agenda is clear and comprehensive; this is even more necessary for virtual meetings than for those taking place in-person. Include any important background information and also the expected outcome for each agenda items; threshing sessions are better suited to in-person meetings. Plan to take notes yourself or designate a note-taker before the call unless you are planning to use a shared Google Doc (see #7 below)

   For the Committee Members:

   Log into the videoconference at least 10 minutes prior to the timed start and get all the software, documents, audio and video testing done before the formal start of the meeting. Think of this as akin to the preparation you do ahead of the start of a physical meeting: traveling to a meeting room, getting your coat off, finding your seat and opening your notebook. If you must enter a meeting late, do not speak as you enter the meeting. The clerk will see that you are present and will recognize you when appropriate.

   For everyone on the call:

   Take a few minutes before you get on the call to settle. Check to make sure you have everything you will need while on the call. Check to make sure you have relative quiet in the space from which you are calling to the degree you can control that. Once the call begins, settle into expectant waiting, recognizing that worship underpins and sustains the work.

2. **Self-muting as a discipline**. Develop the discipline of <u>everyone</u> muting their line until they are ready to talk.

3. **Raising Hands**. Explicitly decide whether or not you are going to use the Handraising feature in Zoom. If you are, practice using it during your introduction/check-in period (during which people will also be practicing muting and unmuting). It is also possible to raise hands physically if most people will be able to video in AND the clerk sets their screen so as to see ALL participants.

4. **Very strict clerking**. When we meet in person, we can talk over each other and sometimes still hear each other. This is not possible online. It is important to be strict

about speaking only when the clerk calls on you – ESPECIALLY if some people are together in a room, and others are joining by video or phone.

A good Quaker meeting is possible without Friends requesting to speak provided (1) all observe the discipline of pausing after each contribution, (2) the clerk is careful to solicit comments from those who have not spoken (3) Friends are careful to self-monitor frequency of contributions (4) Friends listen deeply to one another.

In practical terms, it is often preferable to have the clerk recognize those who wish to speak even when all these suggestions are met.

5. **Awareness of ways to stay engaged.** Use more go-arounds to keep participants engaged and decrease the likelihood they will multi-task or drift off. Encourage as many participants as possible to use video cameras. Participants naturally check the facial expressions, gestures and eye movements of other participants, leading to significantly enhanced "presence" in the meeting.

6. **Managing tech**. For large calls, you need a dedicated tech person who is managing the zoom features and answering tech questions as they come up. A clerk cannot be an effective clerk if they are also managing all the tech/connection issues. For smaller calls, a clerk who is comfortable with the technology can manage both; however, this is another reason to encourage Friends to enter the call at least 10 minutes before the scheduled start time.

7. **Collective recording.** Instead of naming a recording clerk, it is possible to have the committee collectively record via Google Docs. This can help keep people engaged, and results in complete minutes by the end of the call. Also, it often results in more efficient meetings. People participating in the collective recording must be on a computer. They will either be switching back and forth between the zoom video screen and the Google Doc, or they will have two windows.

8. **Limit the length of video conferences to no more than 90 minutes** – 60 is better. It is easier to get distracted on a video conference than in a face-to-face meeting. Shorter meetings help people stay focused.

9. **Ensure that the agenda has been carefully crafted**. Many clerks find that video conferences require more planning than face-to-face meetings.

10. **Ideas to Consider.** Many of us have the experience of not being as fully present on a video conference (even more so on a phone conference) as we are in person. Some of the items above are ways to keep people fully engaged. One could consider at the beginning of the call doing an explicit check in about how "present" people are. For example, "Where are you calling from? What device are you using? Do you have privacy? And what other responsibilities are you managing while on the phone?" The clerk might also send these out as queries before the call—a list of "have you considered" items, which help participants focus on the conditions that will optimize their participation.

Encourage each participant to have and use – or even provide to them if possible - a good quality headset with earphones and microphone. Wireless avoids getting tangled in the cable and eliminates noise from the cable itself; the closed-back over-the-ear headphones reduce extraneous noise to you, and the bone conduction microphone reduces background noises (including your keyboard) going to other participants. But wired rather than wireless, open-back or lightweight in-ear headsets rather than closed-back that allow more background, can be more comfortable for some; many people find that <u>any of these options work much better than the microphones and speakers in your computer or telephone.</u>

*This is a draft document, a work in progress. You may feel free to share it with that understanding.

These comments and suggestions were gleaned by Traci Hjelt Sullivan from a participatory workshop at BYM Annual sessions with commentary and additions from David Bantz, Clerk FGC Communications Policy, Strategy and Infrastructure 8th Month 2018 and from "Virtual Clerking" a blog posting from Emily Provance 8/23/19. They have been rewritten for clarity by Jean-Marie Prestwidge Barch and Sally Weaver Sommer, 2nd Month 2020 for use in a Nominating Committee Consultation hosted by FGC.

Clerks who would like useful, specific instructions on how to prepare for and clerk a virtual meeting are strongly urged to look at Emily's blog post: (https://quakeremily.wordpress.com/2019/08/23/virtual-clerking/)