



Virtual Meeting Toolkit for School Boards

A Guide for Remote Meetings and Technology Best Practices

Some organizations are designed for remote work. For others, the COVID-19 pandemic has forced staff, boards, and leaders into an uncomfortable transition.

According to BoardDocs users, almost all school board meetings now have a virtual component. Running an effective in-person meeting can present many challenges (e.g. technology, preparation, flow), which are only compounded in a virtual setting.

Whether it's a lack of engagement or security, poorly executed virtual meetings can lessen productivity, weaken transparency, and compromise sensitive information putting the community in harm's way. As video conferences become an increasingly important collaboration tool for boards and administrative teams, school districts require secure digital tools that align with open meeting laws, ensure that critical issues can be discussed and voted on, and allow for business continuity.

"A seat at the table" has quickly become a seat in your home office. In this guide, we offer key insights and tips around navigating remote board meetings successfully. You'll come away with core best practices to ensure your virtual meetings are effective, engaging, and secure.



WHY VIDEO?

Many of us shy away from using video, but it's one of the most important ways to make virtual meetings effective.

Here's why:

- Video conferencing is more engaging than audio conferencing. Making virtual eye contact is the next best thing to gathering in person.
- Humans process visual information significantly faster and better than text or audio. The human brain processes images 60,000 times faster than text, and 90 percent of information transmitted to the brain is visual.
- Visual elements affect people both cognitively and emotionally. For teams that are geographically dispersed, the emotional connection is key for deeper engagement.



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Considerations, Tips, and Best Practices



VIRTUAL MEETING TOOLS

- ❑ **Select a video conferencing platform.** Whether it's Zoom, GoToMeeting, WebEx, or Microsoft Teams, there are a wide variety of platforms available to support video conferencing (all similar in functionality). Link your meeting platform to a live stream site such as YouTube rather than making your meeting link public.
- ❑ **Practice using the software.** Use a moderator to handle the technical aspects of the meeting freeing participants to focus on content. The moderator needs to practice and be familiar with the software, the administrative team should practice, then the board should practice. The practice should not contain any items of real business to be compliant with Sunshine Law provisions.
- ❑ **Determine supporting tools.** In addition to the video conferencing platform, consider the tools that are needed to securely deliver meeting materials, support communication, and increase engagement and productivity throughout the video conference. We recommend leveraging a secure board management solution.



MEETING PREPARATION & PROCEDURES

- ❑ **Disable chat and private chat options.** Open record considerations do not go away.
- ❑ **Develop your agenda and include the link to your live stream site in your meeting notice.** Share your Meeting ID number to link to the meeting software in a confidential field inside your agenda. Make the public aware the meeting will be conducted virtually.
- ❑ **Decide how to handle public comment.** Common practice is to ask for it to be submitted via email in advance. If your state or local provisions require two-way communications, choose a meeting software that has waiting rooms. The moderator can put a speaker in a waiting room until it is his/her turn.
- ❑ **Create a separate meeting for closed executive sessions.** Or use private "rooms" in your meeting software.
- ❑ **Be attentive to special accommodations.** Closed captioning is available in some programs; be aware of fonts for accessibility, and have provisions for a sign language interpreter if that is a typical accommodation at your live meetings.

Virtual Meeting Checklist



MEETING PARTICIPANTS

- Camera positioning:**
 - If using a phone, turn it to landscape side.
 - Be aware of backlighting (windows behind you will block you out).
 - Use a static stand/tripod rather than holding a camera.
 - Be aware of background (some pictures will cause copyright issues in live stream).
 - Camera should view you from shoulders up; fill the screen.

- Mic:**
 - Test your mic.
 - Use your cell phone if your computer doesn't have a mic or purchase an inexpensive USB mic.
 - Learn where the mic is on your device and speak toward it.

- Study meeting agenda materials in advance.**

- Create an account for your video conferencing software:**
 - Log in with your account using first and last name.
 - Make sure to only log in one time.
 - Create separate accounts for each person using the computer and log in on your own.

- Eliminate distractions including cell phones if you are using a computer.**

- Slow down in discussions to avoid talking over each other. Get comfortable with silence.**

- Use the camera and video function if at all possible.** Agree that each member use the same medium (i.e. if some members are on video, make an attempt for all members to appear on screen in video format).



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Virtual Meeting Checklist



TECHNOLOGY CONSIDERATIONS

- Turn off other programs/pop-ups, mute notifications and outside distractions.**
- Mic:**
 - Stay muted.
 - Learn where the mic is and speak into it.
 - Can use a blue tooth headset or headphones/boom mic.
 - Be aware of surroundings and cautious about background noise.
 - Moderator can mute participants.
- Camera:**
 - Nearly any camera will work—it mostly depends on bandwidth.
 - Use a built-in camera if it is available, but if your device doesn't have one, use your phone or go to USB webcam.
 - There are apps that convert your smart phone to a web cam.
- Bandwidth** – close other programs to avoid delays, and test in the same environment as the meeting.
- Waiting rooms** – the moderator allows people in when it is their turn.

GENERAL MEETING REMINDERS

- **Be transparent with the public.** Public trust is key.
- **Be positive** in your tone and communications. Lead through the crisis.
- **Postpone controversial topics** until you can have live meetings, if at all possible.
- **Use the tutorials available** in almost any platform. Get comfortable with it, and with mistakes.
- **Be honest** that you are learning a new platform. The public will be understanding.



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How BoardDocs Supports Your Virtual Meeting Workflow

LIVE STREAM DETAIL SHARING

- Link directly to a district's live meeting in line with the meeting details and agenda.

META SEARCH

- See how other organizations are implementing policy or agenda items given a specific topic.
- Access an extensive database of public information posted by other BoardDocs subscribers.

LIBRARY

- Leverage a document storage area to store reference materials.
- Create customized categories to organize library documents, such as COVID-19 resources or Superintendent updates for the board.

BOARDDOCS PLUS

- Manage and control meetings and minutes separately for related boards and committees.
- Designate different publishers for specific boards or committees.
- Create separate workflows and approval processes.

SOCIAL SHARING

- Share meetings, agenda items, policies, or library documents, including the important public notices or alerts.

DIGITAL VOTING

- Allow board members to record their votes in remote meetings in a simple and secure manner.
- Provide an easy way for moderators to open and close voting and monitor incoming votes.



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Governance that makes a difference. Diligent's modern governance solution public education.

BoardDocs is a part of Diligent, the pioneer in modern governance. We empower leaders to turn governance into a strategic advantage through unparalleled insights and highly secure, collaborative paperless meeting software, helping school districts thrive in today's digital age. BoardDocs provides customers with best-in-class security, top-rated customer support, and constant innovation designed exclusively for the needs of your school district.

As a cloud-based service, BoardDocs supplies the tools necessary to host your agendas, policies, and library documents for easy consumption by the public. With BoardDocs, school districts are better able to exercise transparency and navigate remote collaboration effectively. Designed to support nimble public meeting preparation and communication all within a virtual sphere, BoardDocs supports resilience during times of uncertainty and unexpected change.

[Learn more about BoardDocs, a Diligent brand,](#) and how your public education organization can better approach virtual board meetings, boost transparency, and improve governance before, during, and after a crisis.



Learn more about the endless possibilities in security for public education:

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