

Presiding in a Virtual World

When you are asked to preside at a virtual meeting, there are many similarities to in-person presiding. But due to the technology involved, the separation of the attendees, lack of total concentration on the business at hand makes presiding at a virtual meeting even more challenging. Following are a few tips I have found, in my experience, that make you a better presiding officer when you find yourself in the virtual world.

Don't go it alone

In the world of Parliamentary Procedure, whether you are in a virtual or in-person, you do not have to go it alone. Regardless of the size of your organization, when you have problems or questions, you need to rely on the services of a professional parliamentarian. Resources are available online to answer questions, and local units of parliamentarians exist all over the country.

Having a technician from the virtual event platform provider, a person from the event or A/V management team, or a staff or association member well versed on the meeting platform be the host for the meeting. They can start/stop the sessions, provide backups for any A/V requirements, and provide technical support throughout the meeting.

Setting up co-hosts to help monitor speaker requests, questions in the chat, vote execution and counting, etc. can relieve the presiding officer from having to scramble and change thought processes from presiding to “meeting tech.” Let others do this work; let the presiding officer concentrate on keeping the meeting on track.

Know your rules

One of the best ways to establish your credibility as a leader is to know your rules. If you don't know your rules, your members will know it, and you'll come to a sudden understanding of how it probably feels to be a deer staring into oncoming headlights.

To avoid being caught unprepared, make sure you are well read on your group's articles of incorporation, bylaws, special rules of order, and parliamentary authority. No one other than your predecessors (and your parliamentarian) should know as much about these rules as you do.

Work with your team (officers, staff, parliamentarian, etc.) before the meeting to craft procedural rules for the electronic meeting. These should include methods for identifying attendees, speaker recognition, voting, asking questions, handling unruly members, and any other procedures that will make the meeting run more efficiently. Then understand the rules so they can be implemented smoothly.

Plan your meeting

Nothing benefits the presiding officer – and the assembly – more than being prepared for the meeting. Detailed planning provides the best chance of completing the agenda within the available time (or at least knowing whether you will need to hold an adjourned meeting to finish your business).

Here are some planning tips that will make presiding at a virtual meeting much simpler:

- Call on your officers and committee chairmen to submit their reports early.
- Prepare the agenda well in advance of the meeting. Do not include more items than there is time. It is better to have two shorter meetings than one extra-long meeting.
- Obtain and distribute meeting materials in advance and allow time for the members to comprehend the material and ask questions prior to the meeting.
- Make it everybody's responsibility to know the agenda and to be prepared for the meeting.
- Call on members to advise the presiding officer of motions they know they intend to introduce.
- Write a script of the meeting – whether detailed, word for word or presiding notes – to get a good understanding of the flow of the meeting.

Start your meetings on time

People have busy schedules. Your time is valuable, but it is no more valuable than that of the members who have arrived on time and are ready to start at the appointed hour. Just like in-person meetings, you need start virtual meetings on time. Nothing you do commands the respect you must have as the chair as much as starting your meeting on time. Your members know you mean business; that is why you are the chair.

Take it slow and steady

Just like Aesop's rabbit, if you start off in a hurry, you may think the meeting is running efficiently, but then may find out that you are in a situation that you cannot complete, much less do it successfully. When we move at a hurried pace, we *might* get a lot done but many times it is not done as well as it could be with more focus. This does not mean that everything must be done at a snail's pace, rather doing everything at the correct pace to gain quality over quantity decisions.

While there is a role for 'short and sharp' or 'speed' meetings designed to accelerate the decision-making process, these cannot be a substitute for meetings that aim to draw out creative and innovative thought or deliberations. Slow and steady may seem to be a waste of time, but it allows not only the chair, but also the members to collect their thoughts and make good decisions.

Be as transparent as possible

Being transparent goes hand and hand with proceeding slow and steady. As important as transparency is during in-person meetings, it is vital in virtual meetings. Transparency builds engagement by helping everyone feel a vital part of the decision-making process, with a deeper connection to the meeting. As the chair of the meeting, you have work to do in creating transparency at every level. Leave no questions unanswered. Ensure all members understand what they are voting on – even telling the members, “If you vote yes you are authorizing . . . If you vote no, you are opposed to authorizing . . .”

The reward is a much more thoughtful and innovative atmosphere where members understand all facets of the process and feel empowered to solving problems creatively. Making sure every member in the meeting is “on the same page” ultimately proves the best way to get the best solutions.

Use unanimous consent

Unanimous (or general) consent allows the chair to expedite a motion passage without taking a vote. The chair simply asks if there’s objection to approval of the motion. If a member objects, the chair simply take the vote. Otherwise, it is a great timesaver, and members really do respect presiding officers who know how to save them time.

Unanimous consent is a remarkable tool for handling any motion where it is clear the assembly is in favor to pass the motion, especially in virtual meetings. Common situations to use unanimous consent is approving minutes and adjourning a meeting. But unanimous consent is just as useful even if the question is on a bylaw amendment if no opposition is apparent.

Members rarely object to unanimous consent when they know that opposition is so minimal that it will not affect the outcome. By not having to go through an electronic vote, time is saved and you can keep the meeting on track.

Use committees, hearings, and parliamentary for motions

Encourage proposals to be brought through your organization’s committees. Members often have good ideas, but those ideas sometimes need some work before they are ready for discussion and a vote. If your committees are set up well, everybody who’s really interested tackles the discussion in the committee meetings, and the rest of the members know that the committee’s recommendations are based on sound reason.

Teaching your members how to take their ideas to committees can have great benefits for you and your organization. But members need to have confidence in their committees’ willingness to help them with their ideas.

Hearings on bylaws amendments, position papers or resolutions are another way to give and receive information, provide discussion, and obtain information outside of the meeting. Flaws or improvements to the motion can be corrected before it is brought to the floor, saving time in perfecting the motion through amendments. And when members get their opinions heard in the hearing, debate tends to be more concise and to the point during the deliberation of the motion.

The parliamentarian can also be an asset in helping members correctly draft notions before they come before the assembly again saving time by eliminating amendments during consideration of the motion.

Although each of these methods are a good idea with in-person meetings, translating them into the virtual environment assists the presiding officer in having a relaxed, but efficient virtual meeting.

Obtain the goodwill of members at a meeting

It was already noted that starting the meeting on time, taking it slow and steady and being transparent garners the respect and goodwill of the assembly. Hugh Canon in his book *Canon's Concise Guide to Rules of Order* (pages 13-16), stresses the importance of goodwill between the chair and the membership during meetings:

The meetings of an organization . . . provide an opportunity for building enthusiasm for the group. Present are its leaders, the people who will return home and report to the grass-roots members. It is essential that they report confidence and positive achievements rather than distrust and disruption. The local leaders are charged with recruiting members, collecting dues, and moving the organization's program forward. Satisfying, productive meetings build their enthusiasm and help determine their success or failure over the ensuing year.

The Chair makes the difference at meetings. If the Chair is an effective leader - focusing on the members, treating each fairly, earning everyone's trust - then the meeting will be successful. If not, it will end in disarray and fail to meet its objectives. Effective chairing, or becoming a "hero" of the meeting, then, is not just frosting on the cake: a strong, purposeful Chair is essential. Nothing is as tedious or as distressing as a meeting that falls apart when a weak Chair loses the confidence and support of the members.

To become an effective Chair, the individual must establish goodwill, respect, and trust between the Chair and the assembly. The members, of course, have an important role to play, but the initiative lies with the Chair. That person should realize that trust won't come about automatically.

The psychology, or "feel," of a meeting depends on several intangibles: the Chair's sense of timing, the approach, and the general attitude the Chair conveys to the members. In this chapter, I will describe concrete ways - such as avoiding confusion and recognizing

members fairly in debate - in which a Chair can translate these intangibles into a successful meeting.

The atmosphere of a meeting is much more important than the rules. If the atmosphere is bad, then not only will the rules not help, they will become a trap that ensnares both the Chair and the members. If the assembly becomes distrustful of the Chair, individual members may start to question the Chair's decisions, raise points of order about procedures, or otherwise inject themselves into a leadership role from the floor. When this happens, there is likely to be a clash of wills on every issue; the determination of the Chair and the resistance of the members escalate. If this happens, the meeting will undergo a precipitous downhill slide, both psychologically and practically, toward chaos.

Those serving as a Chair, then, must understand from the beginning that their role in a meeting is all-important and that they can establish an atmosphere of goodwill through the many small building blocks of initiatives taken from the opening to the closing gavel. There is no simple formula for building and holding goodwill, but patience and fairness will see most Chairs through the most difficult meetings.

Obtaining goodwill is necessary regardless of whether you are presiding at an in-person or virtual meeting. But in a virtual meeting you must work even harder to build enthusiasm, maintain interaction and provide an atmosphere where decision-making is accomplished and celebrated.

Preside with impartiality

No one is completely impartial. But when the chair presides, they must put aside their personal agenda and help the assembly make the decisions. The chair cannot lose by doing this; ultimately, the decision belongs to the majority anyway. The chair is far better off being known as a leader who ensures that the minority has a full opportunity to present its case than as one who uses the power of the chair to thwart the minority's efforts to be heard.

To preside with impartiality, follow these tips:

- Do not debate motions.
- Do not try to “gavel through” motions.
- Do not vote (except by roll call or ballot) unless your vote will affect the result.
- Do not refuse to recognize members because you disagree with a certain position
- Be the “servant-leader” of the organization; preside with courtesy, but with gentle firmness.

Being a successful presiding officer is to remember that the members control the decision, and you are there to help them do just that.

Control the speaking

Put very simply, the chair should never allow a member to take over the meeting. During business meetings, the chair's duty requires keeping control of the floor, and they can't be in control of the floor if they cannot address the assembly without speaking over a member. The chair should still be polite and attempt to have the member to stop speaking of their own accord. Fortunately, thanks to the technology in virtual meetings, the chair can direct the host or co-host to mute the member(s) or even expel them from the meeting. But you need to ensure that ability is included in the adopted meeting rules.

Keep your cool

Sometimes presiding over a meeting just isn't easy. When disorder erupts, no amount of hammering a wooden mallet on a sounding block is going to do anything but aggravate an already bad situation. If the chair doesn't know how to respond properly, they can make the situation worse. When the chair responds calmly and with empathy, they stay in control, and can defuse the situation in a professional, courteous way. It is important to understand how to deal with upset attendees. And in a virtual meeting you must work even harder. Here are steps to diffuse most situations:

1. **Take the situation offline.** If the situation cannot be resolved quickly, try to handle the situation outside of the meeting. Call a recess. Set up a private discussion. Provide a location that will not embarrass anyone.
2. **Listen.** Respond to the member's needs calmly and emphatically. In tough situations, the issue at hand isn't usually the actual issue; it is how the issue is handled.
3. **Acknowledge their anger.** Do not react to the anger; acknowledge and respond to it. Empathy is powerful. You can handle the situation with a statement like, "obviously you're annoyed and I would like you to know that getting to the bottom of this is just as important to me as it is to you."
4. **Ask questions.** Do not assign any blame or argue. Try to understand of the situation, and do not make excuses or defending the actions that caused the outburst. Show the attendee that you are invested in solving the problem.
5. **Suggest alternatives.** Find out what the irate member wants. Keep moving the situation along in a productive way. After the person expresses what he or she wants, decide what you're able to do and say so. Think outside the box. You can stay within your rules and your organization's guidelines and still come up with an alternative. The attendee will view it as a sign of respect and an indication that you are listening to their specific concerns.
6. **Apologize.** Say "I'm sorry". It may not be your fault but apologizing without laying blame will better position you to act in a manner that your attendee perceives to be in their best interest.

7. **Agree on a Solution.** Both you and your attendee share a strong desire to find a solution. If you need help while you are solving the problem, get it. Regardless of how a problem is solved, getting it done quickly is necessary in bringing this irate attendee around and keeping the meeting moving smoothly.

End on time

Just like starting on time, be respectful of those members who showed up on time and expect to leave on time. Virtual meetings tend to run long unless they are controlled well. Even in ending a meeting you need to maintain the assembly's respect. If a virtual meeting is not going to end on time, you need to establish a continuation of the meeting (continued or adjourned meeting) soon. Alternatively, if all business can be completed with an extra 10 to 15 minutes, you can use unanimous consent to see if the group wants to defer the adjournment slightly, rather than having to establish an adjourned meeting.