Effective and Engaging Virtual Meetings Handout – Table of Contents

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Effective and Engaging Virtual Meetings

- Be deliberate.
- Is this meeting necessary?
- Create a plan.
- Prepare yourself and your members.
- Focus on value.

Is this meeting necessary?

- Meeting = outcomes, decisions, impact
- General membership vs. board vs. committee meetings
- Meetings vs. events and programs
- Members only, member benefit
- This is how we PTA!

Need to Know vs. Good to Know

- Required to make decisions vs. simply good to know
- Advance vs. at meeting
- Best way to communicate and spread the word!

Minimize Time Spent on Routine

- Committee Reports
  - Send with agenda to be read in advance
  - Two-minute committee chair highlights
  - Timed

- Consent Agenda
  - Noncontroversial, routine business and reports
  - One motion, one vote, many components
  - Members may remove item to vote on it separately

Timed Agenda and Special Rules

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- 10-15 minutes per action item
- 2 minutes per speaker
- Virtual raise hands/chat box
- Keeper of the list
- Recognized in order
- Speak to the motion only
- Debate is extendable

Before the Meeting

- Send agenda, minutes, reports, link to join
- Ask everyone to sign on a few minutes early
- Action item background and research
- Use your PTA logo
- Consider a pre-meeting event for complex decisions
- Send electronic voting information
- Welcome slide with tech guidance
- Member list

ENGAGE FOR YOUR CHILD

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Why PTA?

PTA's mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.
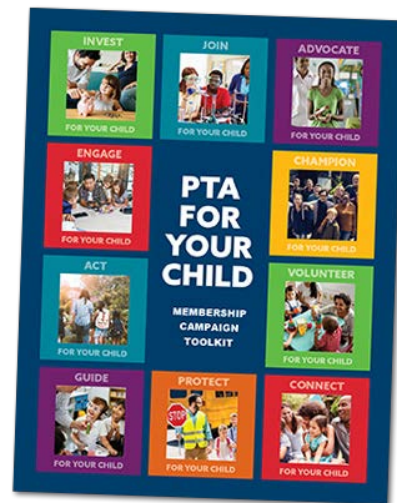
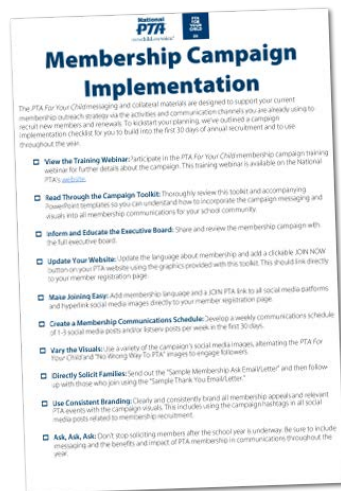# Messaging and Ending Strong

- PTA supports critical academic needs
- PTA gives voice on important issues
- PTA builds strong, inclusive and welcoming community
- This is how we PTA!

- Summarize
- State Outcomes
- Tell what will happen
- Tell them it was because of them
- Value associated with membership

Membership Campaign:
pta.org/membershipcampaign

One Voice Blog: http://onevoice.pta.org/

Join the PTA Local Leaders Facebook Group:
https://www.facebook.com/groups/PTALeader

#HowWePTA

membership@pta.org

– Share a video (1 minute or less)

– Share an idea via email

– Provide your name and your PTA's name, city and state

Effective and Engaging Virtual Meetings: Links, Resources, Tips

Consent Agenda/Consent Calendar (Page 404, Robert's Rules of Order, 12th Edition)

Before you implement a Consent Calendar/Consent Agenda, you are strongly encouraged to read at least one of the following articles:

- Good article from BoardSource on consent agendas.
- Good article from the BoardEffect.com website on what appears in a consent agenda, how it works, and how a member can remove an item from the consent agenda if he/she wishes to do so.
- And another good article on consent agendas from the BoardForward.com website on the do's and don'ts of using a consent agenda.

Preparation Tips

For each action item on your agenda, prepare yourself and your members with the following information *prior to the meeting*:

- Motion
  - What is the motion coming from the board or a committee? What is the item to be voted upon—be as specific as possible. That will focus conversation on the decision to be made.
- Timing
  - If the decision has a deadline, give it. If there are repercussions if no decision is made, give them. Do you lose one of your PTA's options? Is the PTA's ability to act impeded? Is there a budget impact?
- Background
  - What do you know about the decision and/or options right now? What research has been done up to this point. Attach all supporting documents and links a member might need to explore the option and make a well-informed decision.
- Options and Variables
  - If the board or a committee has explored multiple options and they are bringing an either/or motion to the group, what do they consider to be the pros and cons of each? Is it a simple Choice A over Choice B? If not, if there is Choice A1, A2 and A3 vs. Choice B1 and B2, give that info.

PTA Blog Posts

How to Get the Technology Your Local PTA Needs: http://onevoice.pta.org/local-pta-technology-needs/

- *Tips for how to find free or low-cost technology solutions for PTAs to operate in a virtual world.*

How to Show Your PTA Value to Sustain and Grow Membership: http://onevoice.pta.org/show-your-pta-value-to-sustain-and-grow-your-membership/

- *How to host virtual programs, stay connected virtually, and use available resources.*

PTA e-Learning

Take the Using Parliamentary Procedures for Effective Meetings e-Learning workshop found here: https://www.pta.org/home/run-your-pta/elearning

XYZ PTA General Membership Meeting Agenda
September 10, 2020, 7PM Eastern
Online Meeting Link: xxxxxxxxxxxxx

All members are encouraged to join the meeting early to check sound, camera, and connection.

All members are welcome to stay after the meeting and share a tip on best games for family game night.

7:00   **Call to order, introductions, technology instruction, quorum, and special rules**

7:05   **Consent Agenda (minutes and reports attached):**
- Minutes of May 8, 2020
- Officer Reports: President; Treasurer; Advocacy VP; Diversity and Inclusion VP; Membership VP
- Committee Reports: Advocacy; Family Engagement; Fundraising; Programs

7:10   **Officer and Committee Reports:**
- Membership VP (new incentives announcement)
- Treasurer (overview of 2019-20 audit; current status)

Unfinished Business:
- None

7:15   **New Business:**
1. Motion from the Budget Committee: approve XYZ PTA 2020-21 Budget, presented by the Treasurer. (10 minutes)
2. Motion from the Advocacy Committee: XYZ oppose the proposed Board of Education School Use Policy, presented by the Advocacy VP. (15 minutes)

7:40   **Announcements:**
- XYZ PTA Virtual Town Hall on School Safety, Oct. 6, 7PM, Zoom
- XYZ PTA Halloween Haunted Car Contest and Parade, Oct 31, 3PM, XYZ School parking lot

7:45   **Adjournment**

THERE IS NO WRONG WAY TO PTA

Attachments:
- Minutes: May 8, 2020
- Officer Reports: President; Treasurer; Advocacy VP; Diversity and Inclusion VP; Membership VP.
- Committee Reports: Advocacy; Family Engagement; Fundraising; Programs.
- 2019-20 audit report.
- Proposed 2020-21 budget with annotated explanation of line items.
- Proposed Board of Education School Use Policy.
  - Link to Board of Ed policy manual.
  - Link to article in Local News concerning the policy.
  - Link to recording of XYZ Virtual Panel Presentation of proposed policy.
  - Advocacy Committee research and rationale for motion.
- XYZ PTA Fall/Winter Events Calendar
- Information on how to vote using voting vendor (and link to website).

Important Links: [hyperlink]
- XYZ PTA website
- XYZ PTA Facebook Page
- XYZ PTA Twitter
- Board of Education webpage
- XYZ School webpage
- State PTA website
- National PTA website

Using a Virtual Meetings Platform - Basics

Step 1: Know Your Platform

- ✓ Take a tutorial. View a video. Read a Manual. Understand the basics of your platform.
- ✓ Learn the controls: mute and unmute; camera on and off; polling (if you plan to use); sharing screen; and other functionalities of your platform.
- ✓ Check your own camera: what do you want participants to see in your background?
- ✓ If you plan to share a video, be sure you know how to share video audio on your platform.

Step 2: Pre-Meeting

- ✓ Designate a meeting co-host. The co-host can admit attendees if you use a waiting room, monitor the chat box, help participants, keep the facilitator on time, and jump in if the chair runs into a technical issue. Be sure the co-host has the slide deck if you plan to use one.
- ✓ Prepare and use an outline or script to keep on track. Make sure your co-host and anyone else helping with the meeting has the outline/script.
- ✓ Decide who controls the mute button—you and/or your co-host or your attendees?
- ✓ Decide what technology the participants will use (hand raising? Polls? Thumbs up? Online voting?) and create a slide to explain how to use the technology. Consider changing up the method of voting throughout the meeting to keep members engaged.
- ✓ Brand everything with your logo and PTA's Membership Campaign graphics, including your virtual meeting backdrop.

Step 3: Practice

- ✓ Do a trial run with your co-host and others. Ask for feedback and use the feedback. Specifically, is the sound clear, does the lighting work, is the camera positioned properly, is the technical slide helpful, does the meeting flow and keep a quick pace and are you trying to do much?
- ✓ If you plan to record or use a feature such as polling during the real event, use the tools during the practice. Ensure you and your co-host are comfortable at the controls.

Step 4: Meeting Day

- ✓ Get ready at least 30 minutes before the meeting. Use the rest room, grab a drink, quiet the background noise, put the dog in another room. Position the camera and check your lighting.
- ✓ Sign into the meeting at least 20 minutes prior to your members. This is the same for your co-host and anyone presenting. Ensure technology, mic and audio work and everyone is ready.
- ✓ Finish all preliminary discussions and checks before your attendees arrive, put up the technical slide, and be ready to welcome early arrivals.
- ✓ For the facilitator: rev up the energy, be warm and welcoming as people arrive.
- ✓ Start on time. If you plan to record the session, announce that at the start of the session.
- ✓ Do not let a few bumps throw you. There will be bumps. Keep on smiling and keep on going.
- ✓ End the meeting on a high note: recap, tell member what will happen as a result of the meeting, thank everyone who attended, and invite non-member guests to join.
- ✓ Consider adding a short post-meeting networking session for those who want to stay and socialize. Pick a topic and ask people to share ideas. This will add a voluntary social aspect to your timed, well-paced business meeting.

Using a Virtual Meetings Platform – Beyond the Basics for Facilitators

Meeting Platform Features and Controls:

- Always use your camera. Be sure to remember the camera is always on, so watch facial expressions and smile a lot.
- Be thoughtful in positioning your camera. Will yours shoot from below, up your nose and chin first? Will you need to prop up your device so the camera shoots more than just the top of your head? Ideally, you should be centered in the shot with head and shoulders showing.
- Lighting is important. Experiment. Ideally, you should be lit from the front. Do not sit with your back to a light source or window. This will place you in shadow and you look like you are in the Witness Protection Program.
- For your background, use your PTA's logo or graphics from PTA's Membership Campaign. If you do not use a virtual background, consider blurring your background if the platform allows. Be sure to avoid background distractions that can be read like posters, signs, and book titles.
- To headset or not to headset? If you use a laptop, use the built-in microphone unless you know there will be background noise. If you use a headset, find one that works for you, one that is not distracting or uncomfortable, and then practice with it. Learn to use its mute button and discover the best position for the microphone.

During the Meeting tips and suggestions:

- Up your energy! This may not feel natural at first. Remember, distractions are everywhere in a virtual setting, so the facilitator needs to be expressive, change tones, show excitement, and talk directly into the camera to keep your attendees engaged. Nod or acknowledge other speakers to show you are engaged. Practice. Record yourself, place yourself in your attendees' shoes, and listen to what attendees will hear.
- Eliminate distractions on your end. Be sure to disable pop-ups on your device. Silence your cell phone. Then find a place to keep it where the vibrations from the phone will not be heard on the device you are using for the meeting. Make sure other presenters do the same.
- Decide how to handle motions, discussions, and questions. How do you want members to seek recognition to speak? Do you want cross-discussion going on in the chat box? Tell participants what to expect and think about setting ground rules to avoid confusion.
- Keep the meeting moving. Stick to your agenda. Do not get side-tracked. Meeting facilitation is an art—practice and prepare. How will you stop a member who continues to speak beyond their allotted two minutes? What will you say if a member speaks out of turn or makes it personal?
- If your meeting runs long because members have extended debate, build in mental break-time. Ask people to stand in place and stretch or jump up and down. Play a song and ask members to dance in place. Or ask them to sing a song or recite the PTA mission. The idea is to take a mental break from the action without giving members permission to walk away from their device and your meeting.
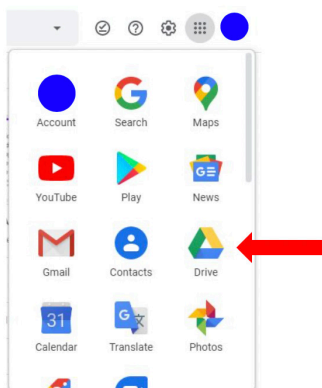
Virtual Meeting Guidelines for State PTAs

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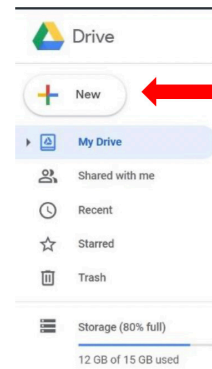## How to Create a Google Form Ballot*

1. Sign into Google. (You will need a free Gmail account.)

2. In the upper right-hand corner, click on the nine dot square.
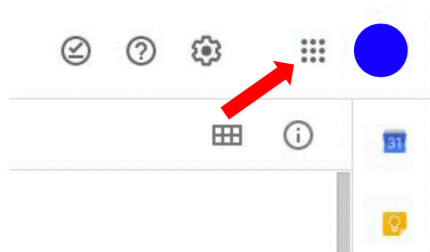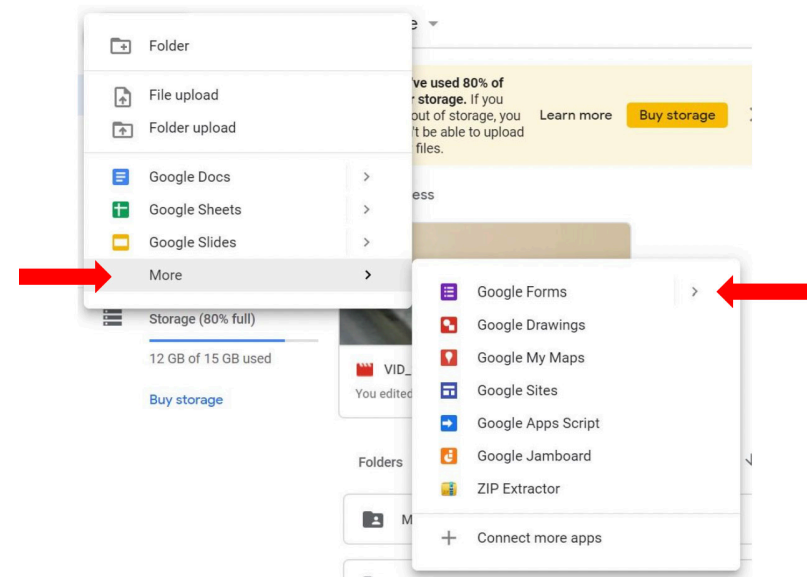

3. Click on "Google Drive."

4. On the upper left-hand side of the screen, click on "New."

5. From the drop-down menu, click "More" and then "Google Forms."

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*Thank you to California PTA for use of their document as the foundation for this one.