The Episcopal Diocese *of* Olympia

The Episcopal Church in Western Washington   **www.ecww.org**

Best Practices for Virtual Annual Meetings

As we prepare for the start of 2021 and make plans to hold our annual meetings virtually due to the continuing COVID-19 crisis, the Office of the Bishop wanted to prepare a brief document on best practices on virtual meetings based on the things we learned during our own virtual Convention. While the virtual meeting space can be intimidating, we do believe that there are some basic settings and procedures you can put into practice to make your own church's virtual annual meeting run as smoothly as possible.

Platform

As most of our churches and members are already familiar with and regularly use Zoom, we recommend using Zoom meetings for your annual meeting. Depending on the size of your congregation, you may need to increase the size of your Zoom meeting room for a limited time and go back to your standard size once you have completed the work of your annual meeting. The Zoom meeting will allow anyone in your congregation to speak, and it will allow anyone in your congregation who does not have reliable internet access to participate in the annual meeting via phone.

If you have a larger congregation or are worried about having too many participants who can potentially interrupt the meeting, you may want to consider setting up your meeting as a webinar. You would want to have participants who will be regularly speaking set up as panelists, and everyone else will be attendees. If an attendee is going to be invited to speak, they would need to be promoted to panelist. Then they would be returned to attendee once they are finished speaking.

With either option, you will want to have someone designated as the Zoom host who can monitor participants and attendees, let individuals into the meeting or webinar, look over the chat and promote attendees to panelists if you're running your annual meeting as a webinar, and answer questions that may arise. This person should not be the individual running the annual meeting or anyone who has procedural responsibilities during the annual meeting, but it should be someone who can focus entirely on the technical aspects of the annual meeting.

Please note that a free Zoom account only allows meetings of 40 minutes maximum, with a maximum of 100 participants. If you believe that your annual meeting will run longer than 40

minutes or will include more than 100 participants, make sure that you are using a paid Zoom account. If you would like to record your annual meeting, make sure to announce at the beginning of the Zoom meeting that you will be recording the meeting and that anyone who does not wish to be recorded should turn their camera off.

Security Settings

When you set up your annual meeting, whether as a Zoom meeting or a webinar, there are a few security settings that you will want to enable to protect your annual meeting from Zoom-bombers and to ensure the smooth running of your annual meeting. You will want to make sure that the annual meeting is both password-protected and that you have the waiting room enabled. This will ensure that only members of your congregation who have the password are able to join your annual meeting, and if anyone does happen upon the Zoom link with the password, your Zoom host can see their name in the waiting room and, based on the name they give, decide whether or not to admit them to the annual meeting.

If you have set your annual meeting up as a Zoom meeting, you should also make sure the settings in the Zoom meeting are set so that the participants' microphones and cameras are turned off as soon as they enter the meeting. The Zoom meeting host can then monitor the participants and make sure that participants are muted throughout the annual meeting, unless called on to speak, and can remove people from the annual meeting if they behave inappropriately.

Procedure

Please see the additional guide on best practices for procedures that has been drafted by our Diocesan Chancellors. This guide will discuss Rules of Order, Voting, and other important parliamentary procedures to ensure that your annual meetings are run according to church and diocesan bylaws: https://ecww.org/guidelines-for-conducting-an-virtual-annual-meeting-canonical-and-legal-requirements-rules-of-order/

Apart from procedural issues, you will want to devise a method for calling on members of your congregation to speak during the annual meeting. Zoom has a raised hand function that allows participants and attendees to "raise their hand" in both meetings and webinars. You can have the host monitor the participants and attendees and let the individual running the meeting know when someone would like to speak so that the participant or attendee can be called on.

If you have set up your annual meeting as a webinar, you will need to have the host promote your attendee to panelist while they are speaking and move them back to attendee once they have finished. This process is similar to Zoom breakout rooms, where it can feel like you have left the meeting before coming back into the webinar in a new role. Because this experience can be

slightly disorienting for anyone who hasn't experience this, you may want to explain this to attendees.

Back Channel Communications

You will also want to find a way to have the individuals who are running the meeting (including the person hosting the meeting) to be able to communicate with one another. While Zoom does have a chat function, it is all-too-easy to accidentally send a private message to the entire group and visa-versa.

Consider using a stand-alone messaging app like Basecamp, Slack, or even Facebook Messenger to get all of the meeting organizers on the same message thread. This will allow the Zoom host to let people know the order of attendees who are waiting to be called on (without forcing the meeting organizers to multi-task during the meeting), and it will allow everyone to be on the same page in case any technical issues arise.

Technical Issues

Technical problems will come up in a virtual meeting, and part of any virtual meeting's success lies in how quickly they are acknowledged and addressed. Let the participants and attendees know if something comes up, let them know that you are working to resolve the issue, and let them know if it was a one-time glitch. This will maintain confidence in the process and keep your participants and attendees from getting overly frustrated with the issues that will inevitably arise.

Practice Sessions

We highly recommend setting up a practice session beforehand and simulating as much of the meeting agenda as possible so that you can get a feel for how a virtual annual meeting will work. This will allow you to work out any bugs, discover any flaws in the technology, and see if you need additional technical assistance. If you give yourself a run-through several weeks in advance of your annual meeting, this will give you enough time to troubleshoot with the Communications Staff at the Office of the Bishop (communications@ecww.org) and find some potential solutions.