# Transcript of March 2021 Hybrid Meetings Webinar

**Caroline:** All right. My name is Caroline Hoy and I'm with Boardable. And I am excited to talk with you today about how to get ready for hybrid meetings and a return to the office. And today I am speaking with the incredibly knowledgeable, incredibly experienced, and humble Kim Donahue who is our...

**Kim:** Hi, everyone, [crosstalk 00:00:27] today.

**Caroline:** Kim, can you tell us a little about your background and how you work with Boards now?

**Kim:** To give the short version of this, I'm a capacity builder. And for 12 years at United Way of Central Indiana, I directed capacity-building programs with 86 partner agencies. So there is very little I haven't seen or heard when it comes to nonprofit organizations. I retired three years ago, but my friends refer to it as my rehirement.

**Caroline:** I like that.

**Kim:** And one of the things I really enjoy doing is working with Boardable. I've done some consulting with some Boardable clients that needed a little bit of help. And I love doing these webinars with Caroline and love hearing from all of you out there. We're going to ask you some questions today, too. So we're hoping that we can learn something from you as well.

**Caroline:** Absolutely. All right. Well, for those of you who haven't encountered Boardable before, we are a board management software solution, which is a central location where you can plan your meetings, store your documents, communicate with board members. You can do voting and e-signature, and we have a new video meeting platform that I think you're going to love for these hybrid meetings. And we'll talk about that a little bit more later on. All right, Kim.

So here's what we're going to cover today. All right. We want to talk about some options for virtual hybrid and in-person meetings, which I think most of us are familiar with. But we're mostly going to talk about how to prepare for returning to the office in those meetings, and how to conduct really engaging meetings where half the people

or however many are in the room, and half of them are on the video. So we are going to cover all of this and much more. So be sure to enter your questions as we go. All right. So just to look back briefly, obviously, we all know how 2020 was and what a mess it turned out to be for many of us. But, you know, I'm really proud of this industry and how it pivoted, don't you think, Kim, people became really [crosstalk 00:02:35].

**Kim:** I absolutely do. It's hard to realize that it's a one-year anniversary. I don't think any of us thought that a year later, we would still be working hard to get back to whatever it was that we used to think was normal. And I think for all of us, things will probably never go back to the way things were done before. And that may turn out to be a good thing.

**Caroline:** Yeah. I'm asking the audience here if you think your board will ever return to...I put before rather than normal because some people are already doing a lot of virtual and hybrid, I think. But it's looking like 70% saying that they don't think things will be the same or that they will do things differently from here on. But as you said, I think that that does offer actually a lot of opportunities, too, so...

**Kim:** I think it does. I think it's a good refresh for us. And it's a way for us to take a look at the way we've always done things.

**Caroline:** Yeah, I think that's a really great point. First, we'll go through these, and then I want to talk a little bit more what you were saying there about it being a chance to assess. What did we like about the old way? And what does this give us a chance to kind of ditch and start new with? But one of the biggest benefits, I think all of us can relate to this, it's nice not having to worry about a commute or logistics. So we're getting better attendance also.

**Kim:** Especially, I think it's also hard for people to say they can't attend.

**Caroline:** What's your excuse, Bob? We know you're at home.

**Kim:** Yeah. What's your excuse, Bob? We know you're home. You know, all you need to do is sign on. So I think a lot of boards that I know have said they've had much better attendance during last year.

**Caroline:** Yes. This is an interesting thing we saw in our board engagement survey. We did our third annual survey of the board experience in 2020. And this was a very clear trend, better attendance, meeting a bit more often but for shorter amounts of time.

With the virtual you can just kind of hop in, hop out type of thing. One exciting aspect I think is you can really recruit from a wider pool geographically, which could help your diversity initiatives.

**Kim:** That's a really good point. That's one I hadn't thought of before, but that's a really good point, yeah, especially when you have statewide organizations. It's always been really hard to have in-person meetings and to have any kind of attendance. But with the virtual attendance, it's been much easier for statewide organizations to get great participation.

**Caroline:** Yes. And then, you mentioned when we were prepping for this, it's just more inclusive of people who have other commitments and things. They can still participate. And then the last thing I thought was interesting in our engagement survey was it sort of forced people to be creative with digital fundraising and kind of revamp the way they did that and try some new things. So that's exciting, too. All right. But let's really just dive into how we're going to prepare for this new situation. Some people coming back to the office, some hybrid meetings. Kim, what are some things that we need to consider before we even start planning here?

**Kim:** I think your first two points on the slide are really important ones to find out if you can have virtual meetings. You know, we talked about this months ago, when we were first talking about how the world had changed, that you need to know if your bylaws allow you to have virtual attendees. You know, I know some bylaws make provision for people to be able to attend by phone. Others strictly forbid it. So you need to know what your bylaws allow you to do.

**Caroline:** Uh-hmm and possibly make some amendments if you need to. Okay. And then, I thought this was a really interesting point you made to me when we were prepping is some meetings aren't a good fit for this.

**Kim:** I do think it's going to be hard. And I do know a number of organizations right now that are going through a strategic plan process and feel that they're doing well doing it virtually. But I do believe that when you're really planning for the future if you can find a way to get together in-person, I think there's a lot more energy in the room.

**Caroline:** Uh-hmm. So some of those strategy sessions and things if we can maybe wait till later in the year when it's safe to be in-person, you think that would be better than trying to do it...?

**Kim:** But I also don't want people to think that they can't do planning, or they can't do a retreat virtually because there are organizations right now that have done it very successfully.

**Caroline:** Okay. That's good to know. And then just some more like logistical type of things. We need to think about ahead of time what are our rules for having people in the same building, you know? Are we going to limit the number of people or have certain distancing? Are we going to have hand sanitizer stations or whatever the provisions there might be? And then, I think this one is really crucial and easy to get wrong. How are we going to communicate all of this, right? And would you say it's different for the board versus the staff versus, you know, volunteers?

**Kim:** And especially with clients, you know, we'll be talking about the differences between different kinds of organizations do, that clients need to know when they can be in touch with the organization, how they can be in touch with the organization, how they can still receive services.

**Caroline:** So that might be almost a subcommittee or like a dedicated staff person to figure all this out because we're going to need to probably communicate it via email, and social media, and phone call, text, whatever [crosstalk 00:08:54].

**Kim:** Yes. Yes, certainly.

**Caroline:** It's kind of an ongoing, rolling situation there. All right. And all of this will be included in the checklist that we're sending you tomorrow with the replay recording as well. Okay. So then, obviously, there's some technical preparation. I want to hear your story about bullet point number one here.

**Kim:** Bullet point number one. I am sure all of you have seen the stories about people who did not dress professionally for meetings. I have a friend who had a regional sales meeting. And she said people signed on to the Zoom meeting. They did it all by Zoom. And one of the people in the meeting was in his pajamas, lying on his couch with his laptop on his lap. And the rest of them were kind of stunned because they were all sitting at their desks dressed professionally. And they said when they took a lunch break when they came back from lunch break, he too was sitting at his desk, dressed very professionally. And I think sometimes we've almost gotten too casually and especially when we go back and have some hybrid meeting, those of us who are attending virtually need to remember that we probably still need to dress up just a

little bit. One of the people who was actually attending this webinar, I remember one of her best comments was she decided that this was an important meeting that she was attending on Zoom, so she actually wore real pants and not sweatpants. And I think we've all had those moments. It's easy to get really, really casual about it and it doesn't mean that you have to dress in a suit and tie or a dress. But it certainly means that we do want to respect our colleagues who are live and in-person as well.

**Caroline:** I also feel like and maybe other people don't need this, but it gives me a more professional or engaged feeling to be dressed professionally.

**Kim:** I think that's often true. Yes. I think that's often true.

**Caroline:** [crosstalk 00:11:01] face of taking it seriously. Yeah.

**Kim:** And Caroline the second point up there was yours and I think it's also an excellent one.

**Caroline:** Yes. I know there's a temptation to sort of turn the camera off and do your thing. And I put 90% here because I understand, like, sometimes the dog is chewing on your leg or something and you have to deal with something that not everyone needs to see. But overall, I think once you turn that camera off for more than 5 or 10 minutes, it's so easy just to be checking email and, you know, playing Candy Crush.

**Kim:** I think all of us have been in Zoom meetings where someone has their camera off, and you think, "Hmm, I wonder what that person is doing? Are they paying attention at all to what's going on?"

**Caroline:** Are they even there

**Kim:** Yes. Are they even there? If someone mutes themselves and turns the camera off, you have no idea if they're even there.

**Caroline:** Yes. And then, obviously, you know, test all of your equipment. Make sure you can hear and your camera's working and all that good stuff. This is another one that I think requires a lot of discipline is just try to set yourself up for engagement by shutting down all the extra stuff as much as you can. Maybe leave your phone in another room if you can do that and sort of minimize those distractions. And then this last one...

**Kim:** I think phones are the worst. I think phones are the worst distraction. It's often very hard to ignore your phone if a text pops up or if you get an alert that you've got an email. And I think, especially if this is an important meeting...I think you have to be willing to set your phone aside, as hard as that is.

**Caroline:** Agree. And then, this last one is more just about, you know, it takes some effort to contribute in a virtual meeting. And I think being intentional about that and sort of making yourself participate maybe even a little more than you normally would in-person is probably going to help everyone feel like the meeting is more mutually engaging. Do you think so, Kim?

**Kim:** Oh, yes, absolutely. I think the more participation you can have from people the better and we're going to talk more about that in a minute too.

**Caroline:** Yes. All right. Now, for those people who are in the room physically, they have a different set of, I put rules, which maybe is a bit harsh guidelines. This is something you and I discussed a lot. And I really think we've hit on something here. Rather than trying to have a camera that's like catching everyone sitting at a table, what if each person brings their own device and looks and speaks into it? What does that add for the virtual attendees?

**Kim:** I think it adds a lot. And I think it... Last spring, I facilitated a meeting where we had the virtual attendees up on the big screen. But the only person they could see was the person who had the laptop who had logged onto the Zoom meeting. And they couldn't see the other people in the room. And they had a lot of trouble hearing the other people in the room. So the virtual attendees, we could see and hear them, but they really didn't get the feel of what else was happening in the room. And the person who had the laptop had to keep telling the virtual attendees, "So and so just said this. And we thought this would be a good idea." And if everyone logs in, your in-person attendees are still in the room and eye contact with the other people in the room. But the virtual attendees can see everyone. And I think it does help to connect people.

**Caroline:** Yes. And then, I saw some comments in the chat. First of all, as far as our cameras, I'm going to wave and say hi. Hi, I'm really here. But we do find that our sound is...

**Kim:** Hi. Hi, everybody.

**Caroline:** ...off. So we will turn those off, contrary to my advice here that everyone should [crosstalk 00:15:17].

**Kim:** Yes. We think the slides are much more interesting than we are right now.

**Caroline:** Right. And then also in the chat, someone mentioned the echo. So that's why the second bullet point is really important that you've got to mute yourself when you're not talking. And then, so people have tried this and they said it was a mess. Yeah, if you have people who are lazy muters in the room, won't work well. But, you know, I guess the important point here is to find a way to portray everyone in the room so that the virtual attendees feel like they have an equal perception of the conversation and the presenters and all of that. So, you know, however, you want to do that, if you want to just use one camera and one microphone, go for it. Or I think if you had everyone mute themselves, and maybe have a central microphone that could possibly work. It just kind of depends on your group and your setup. But another thing we want the people in the room to do is to minimize the side conversations, which is probably really hard to do.

**Kim:** And I think if every person is on a device, it's harder to have a side conversation and to get away from the meeting as a whole. So I think it's easier when everybody is on their own device to control that. And I think it's just one of the ground rules that you emphasize. I think if you have any regular meetings, the people who attend those regular meetings should be aware of the ground rules, and one of the ground rules should be no side conversations.

**Caroline:** Yeah. There's nothing worse than being attending virtually, and you can tell people in the room are like muttering back and forth, but you can't hear anything. Yes. So a lot of people in the chat talking about... Oh, Lisa suggests a Blue Snowball, which is some sort of external microphone that everyone in the room would be able to...it would pick up probably most of the people in the room, so...

**Kim:** It's good. That's a good idea.

**Caroline:** Yeah. All right. Now, let's get down to some brass tacks of how we're going to conduct these meetings in the best way possible. And you talked about setting expectations. So let's talk a bit about how to do that.

**Kim:** And I think the most important thing is that whether it's an all in-person meeting, or an all-hybrid meeting, or an all-virtual meeting or a hybrid meeting, following all the good rules of meeting management is still really important. And I think setting expectations before the meeting, so everyone knows what to expect. And I also think that first point is really crucial. This is new territory for a lot of us, being able to communicate with our teams, both virtually and in-person, and trying to combine those two things. So I think we have to give ourselves some grace and recognize that what we try may not work really well and that we need to be willing to compromise and be willing to take suggestions. I noticed one of the things in the chat is he said, "With dozens of people in the room all on their own advice, our Wi-Fi bandwidth could get overloaded." Well, I think if you have dozens of people in the room, wow, that would be probably pretty much of an overload. And I think if you tried a meeting like that, and you discovered that you'd know that there's something you needed to change, that you needed to be more adaptable. And I think it's good to be aware of those things and to be prepared to make changes as you go.

**Caroline:** Yeah. There's no one-size-fits-all. And as more people come into your office and the numbers change, that can also create a tipping point where "Okay. Before we had four people each on their own device, but now we've got 10 people in the room, and that's not going to work now, so..."

**Kim:** And with flex schedules that a lot of organizations are going to, you may not have the same people who are always in the room, and the same people who are always virtual. It may be a mix of people, people who were virtual for the last meeting. Some of them may be in-person for the next one because of their flex schedules. So you have to be prepared to be adaptable. They always say one of the most important characteristics of any nonprofit is being adaptable and goodness knows that over the last year, all of you in the nonprofit world have been more than just adaptable. You have adapted and in many cases have thrived in being able to make changes on the fly and look at how you can best serve your community with a mix of different resources now.

**Caroline:** Yes. Interesting. All right. And I think it would be worth... What do you think about at the beginning of each meeting, just maybe kind of reviewing some of these guidelines, like, "Remember everyone, no side chats. No, you know, we're going to..."

**Kim:** Yeah. And we're really looking for everyone to participate in this meeting. So we're going to look for... Questions are expected and really welcome. So feel free to ask questions during this meeting. We don't want this to just be a sit and listen meeting for everyone, whether they're in the room or they're attending virtually. We want this to be your meeting as well as ours.

**Caroline:** All right. So there's some things we can do with the agenda to make this meeting more engaging. How about I'm going to let you talk about your tips for agendas with virtual meetings? Well, I guess these apply to any meetings. But...

**Kim:** Any meetings. And I think all of you out there know that when you attend a meeting where there are endless reports, where people are reporting out, it doesn't take long to lose people. And if you've got people attending virtually you lose them even more quickly. So try to give people materials beforehand. And that's a good example of why I really love Boardable because Boardable does a great job of putting all the documents in one place, so that everyone who's attending that meeting, whether they're there in-person or virtually knows where they can find all the materials for the meeting in one place. They know where to go for everything.

And then, I think the second point, making assignments to people, having various people participate in items on the agenda. So there may be things that the people who are attending virtually, maybe one or two of them can lead an agenda item. So the more you involve people, the better. And Caroline added that last point about no more than five minutes without participation from the group. And sometimes that's hard for us because it's easy for us if we're facilitating the meeting. It's much easier to tell people than it is to involve them and ask questions. So we have to train ourselves to be willing to really ask questions, and call on people and ask for their opinions.

The more you do that, the more involved you will find that your participants are. I told Caroline before the meeting started that I had a Zoom meeting this week that was one of the best I'd ever had. And I sat down afterward and thought about what was so great about it. And it was that everyone in the meeting participated. People had questions. People provided help to one another. The energy was so high in that meeting, it was probably one of the best Zoom meetings I've attended. And it was because of the level of participation and that people felt comfortable asking questions. And other people felt comfortable offering opinions. So I think the more you involve people, the better your meeting will be.

**Caroline:** I love that. Yeah. And you can get really creative, I think with these participations from the group. But we're going to talk some more about ways to keep people engaged. All right. So some best practices, how we're going to set the stage for engagement? What to do when people check out, and tips for fantastic hybrid meetings? Someone in the chat mentioned this because... Who was that? Debbie, the emcee of the meeting really needs to manage the questions and the order of speakers and that kind of thing. So I agree with that. This is going to be all about, you know, good facilitation. So let's dive into that. So some best practices. We're going to set the tone. And how do we do that Kim?

**Kim:** Try to get everyone to say something at the beginning of the meeting. Caroline and I were joking about icebreakers and the fact that most people, as soon as someone says the word icebreaker, everyone's eyes glaze over. Someone I knew called that a mego moment, M-E-G-O. My eyes glaze over. I'm not suggesting that you ask people what animal they would like to be or what flower is their favorite. But you might want to ask them a question that allows them to participate. And Caroline, you had some good suggestions on that that the Boardable team uses.

**Caroline:** Yeah. Each week at Boardable we have an all-company meeting and especially when were smaller. We're up to, like, probably too many people to do this in a meeting right now. But for a board meeting, I think it would work great. We just did a one-word check-in where the board chair or whoever's facilitating would just go around the room or across the virtual attendees alphabetically, whatever you want to do, and just have everyone say one or two words to kind of sum up how they're feeling right then. Another thing we do is we rate the week from 1 to 10. And then, at the meeting, our management shows the average for the whole company. So like, "Oh, we dipped a bit this week with the stress of our product launch. We're down a point from the week before," and that kind of thing. But I think the one we're checking is a really low stress, simple, helpful way to just kind of get everybody talking, and also sort of get a feel for the mood of the room.

**Kim:** Those are great suggestions. And research has shown that if at the beginning of a meeting, you can get every person to say something, no matter what it is, it increases the likelihood that they will participate during the meeting and speak up during the meeting.

**Caroline:** I love that.

**Kim:** The second one is a great one. Caroline, you want to explain that one? I love this one.

**Caroline:** Yeah. So, you know, one of the things we saw on our survey a lot was people, you know, appreciated how convenient it is to go to a virtual meeting. But they felt like the rapport and the trust between the board members really struggled. So we're trying to think of ways to kind of help simulate that camaraderie in the room and those casual conversations that help people build rapport with each other. And we thought about, you know, what if you just had like 15 minutes before the meeting, "Hey, everybody. Log on early if you'd like to, you know, come to the lounge area, or the water cooler, whatever you want to call it." And just kind of have that expectation that there's a little bit of social time before you get started.

**Kim:** I think we all know that that's part of what we missed most about going virtual is that we didn't have those in-person interactions with our coworkers anymore. We didn't have those informal interactions where a lot of really great stuff happens. You all know, lots of collaboration happens. People ask each other questions. They come up with new ideas together. And people miss that. And I think having this time before the formal meeting starts where people can just say hello to one another and have some conversation, although it certainly is not a substitute for being able to see people, it does really help. And I think if you've got a hybrid meeting, it is especially helpful because it allows those people who are attending virtually to interact with their friends who are in the room together.

**Caroline:** Yes, love that. And then, I mentioned this before about just kind of going over those ground rules. And then, this is an idea. This last one is something that I... I went to a training or a workshop type thing and they did this. They sent you a little care box beforehand, like the week before, that had like some jerky, and chips, and a mug, or a pen or something like that. But just any kind of little token things to make people feel like they're all in the same boat, I think, can be really nice.

**Kim:** It's a great way to make people who have to attend virtually feel included and part of the group. I think that's a really nice idea. And for a board meeting, that might be a lot of fun. It's kind of a gentle reminder about the meeting, too.

**Caroline:** Yeah. And, I mean, you can't do that for every meeting. But if you have like a special one or a board meeting that you don't have all that often, then yeah, you

could definitely manage something like that. All right. Here's some more ways to engage everyone. How are you going to conduct this meeting, Kim, to pause for questions or to call people individually?

**Kim:** That's where, you know, one of the things we said on a previous slide was, your board chair has to really step up or whoever is leading the meeting needs to really step up and really facilitate it. The word facile means easy. And that's what someone who facilitates the meeting will do, make it easy for people to speak up. I think if you get everyone talking in the beginning, and then trying to engage everyone to, you know, the thing we said earlier about every five minutes or so, ask a question. Help people feel included. Ask them some questions. If you've got some people who have just been silent for the meeting saying, "Caroline, we haven't heard from you on this. What do you think about it? Do you have some ideas about this?" Or, "Do you agree that this is a good idea? What do you think?" And then, you know, we all know there are other features where you can use breakout rooms if you want to have smaller groups discuss things.

**Caroline:** Yeah, that's a great way to sort of break up the larger group into some more relatable small groups. And then, this is my chance for all of us to share our best ideas. So I've already seen a bunch of good ones in the chat. Let's see. What are the ways that you've tried that have been helpful for engagement? And Kat says they started putting a fun PowerPoint and playing jazz music 15 minutes before the meetings. I love that.

**Kim:** A nice, nice idea, a nice way to make people smile before that meeting starts.

**Caroline:** Yeah. You can do lots of fun things with the PowerPoint, like have a photo collage going or, I don't know, something funny for the group. Kathy says, "We send snacks to the virtual attendees that we have in the meeting and try to tie an icebreaker to that." Awesome. Love it. Bob says, "We've done a full retreat that included a DoorDash meal together or a curated cocktail box presentation."

**Kim:** Very nice.

**Caroline:** A lot of fun. Let's see Kathy says, "Breakouts with an informal topic is great to encourage our board members to get comfortable with each other."

**Kim:** And that's probably a really nice thing because I'm sure a lot of you out there working with boards have had new board members start during the pandemic. And they may still have never had an opportunity to get to know other board members. So that's a really nice suggestion to put them in smaller groups together too.

**Caroline:** Actually, that reminds me of our Christmas party or holiday party for Boardable. We had like three breakout rooms and you just went in for like 10 minutes. But it was a mix of four different people. Each room you went to was different people. And then there were like some conversation starter questions that you could, you know, where are you from and stuff like that. People get to know each other. Oh, this is interesting. So E.S. says, "Using MURAL or Google Docs for shared brainstorming." So kind of like that whiteboard effect where you have a document up and can kind of get people's ideas down. I love that.

**Kim:** That's great, too, another great way to make people really feel involved in the meeting.

**Caroline:** Whitney says that teams has...Microsoft Teams, I'm guessing. You can set up, like, breakout rooms on those. Oh, Andrea, I love this idea. Asking people to give shout-outs to each other. So you're...

**Kim:** Oh, nice. Yeah.

**Caroline:** ...not only hearing from everybody, but you're building each other up too. Okay. Sally, again, virtual whiteboards with sticky notes to assist with active brainstorming. I love that. I feel like that's such a hard thing to replicate virtually. Breakout committees in a brag moment of the week. Love it.

**Kim:** A brag moment of the week. That's a great opening question to get everyone... It does a couple of things. It's a really nice, friendly question. But what a great optimistic question. What a way to have people start the meeting feeling really good having shared things they're really proud of. I like that one a lot. I'll take that one. I'll steal that one.

**Caroline:** Oh, Katie's chiming in with a good one. Use meeting break time to have a scavenger hunt and giving people 10 minutes to find a list of items around their home.

**Kim:** I like that.

**Caroline:** All right. Yes, check-ins that relate to the meeting topic. For example, if the meeting is about thinking in new ways, reflecting on a fashion or other trend we used to love but don't anymore. Oh, so many possibilities there.

**Kim:** Oh, yes.

**Caroline:** Oh, I love it. James says that they rotate the mission moment among different people. And let's see Louise, how do you use DoorDash? I think that would just be sending everyone an email with a gift card in it. That's at least what we've done. Maybe you could be fancier about it somehow. Lots of repeating breakouts. Mary says, "Delivered teacups to attendees, a Valentine tea, and with all attendees of virtual. I love that."

**Kim:** Yeah, very nice. And Kathy had some suggestions for Louise. That's great.

**Caroline:** Yeah. Excellent. Yeah. It comes across like a little e-card, which is fun. Using the chat during meetings to document decisions. Oh, Lisa, good idea., include a download of this chat.

**Kim:** That is a great idea.

**Caroline:** List the next item on the agenda to keep people engaged, yeah, so they kind of know what's coming up next, what to expect. Gosh, there's so many good ones in here.

**Kim:** Yes, these are great ideas.

**Caroline:** Peter had an idea that you and I have discussed sort of a mentorship program where you have new board members paired with more veteran ones too.

**Kim:** Or in your organization to have new employees paired up with someone who's been there for a while. I have a daughter who started a new job last March. She has never met her team in person. She knows all of them virtually and likes them all virtually. But she's looking forward to the day when she can actually meet them in person.

**Caroline:** Yeah, that's fascinating. A good positive meeting start is a word of inspiration or a quote. I love it. These are all really great ideas just to kinda set that tone. Okay. And then just a few other additional considerations as we start to wrap up here a little bit. Here we go again with the new board member orientation. So

implement a buddy or mentor. I think the nice thing about that, too, is it not only helps the new board member, but it also helps the senior one feel more engaged with their work, and it kind of reminds them of why they're doing it and what it is they like about it, right?

**Kim:** We all know the one about having a private conversation with any meeting conduct concerns out there. We all know that occasionally you have someone who likes to talk a lot, or move away from the agenda and tell a story. And to be able to gently pull them back in, it's... Well, one of the great techniques, you can use your chat as a parking lot. And just if someone is going far afield from the agenda, saying, "Gee, Bob, that's a really good point. But we need to get back to the agenda. Why don't you type that into the chat, so that we don't forget about it? And we'll decide where that needs to go if it needs to be on the agenda for the next meeting, or if someone needs to report out on it."

And then I think, again, down at the bottom here, collecting feedback on what works and what doesn't. If you're not familiar with Plus Delta, Plus Delta is a great way to evaluate a meeting in a, you know, in-person meeting, you give everyone two post-it notes, and you ask them to write a plus on one and a Delta on the other. And on the plus, they write something that they thought really worked well. And on the Delta, they write something that should change or should be included. You can ask your virtual attendees to just shoot a quick email to you afterward, you know, write Plus, write Delta, and tell us how things went. And if there are changes we need to make, or if there are things we need to be sure to do again next time because it was really good.

**Caroline:** Yeah, I was telling you the story of my sister works for a large health network. And she was telling me about being in a meeting with a bunch of like, insurance actuaries, and like the financial people, generally very serious meeting attendees. And the person facilitating, like, asked them to do some really corny icebreaker. And she said you could just see on people's faces that they wanted to crawl under the table. Yeah. You need to get feedback on whether people appreciate some of the things like that.

**Kim:** Yeah. You have to know your audience.

**Caroline:** Yes, that too. Let's see. "In meetings with a busy agenda, we appoint a timekeeper to remind speakers when they're at their time limit." I love that. We actually...

**Kim:** That's a really good one. I think an agenda that's time-based is a good idea where every item on the agenda is allotted an amount of time. And a timekeeper that you appoint can gently remind, you know, "We've allowed 10 minutes on the agenda for this." That's a great suggestion, Tom.

**Caroline:** We even have in our meetings, you can go on YouTube and find a countdown of however many minutes you want, two minutes, eight minutes, four minutes, whatever. And we play it on the screen with the countdown. So people...

**Kim:** That's good.

**Caroline:** ...know that they're at the end of their timer to get their point out. But it really does help you stay on track and move things along, especially when you're virtual or partially virtual. All right. These are such great suggestions. And there's more coming in on the chat. I'd love to hear more about those. I'm just going to quickly tell you about our new virtual meeting tool in Boardable, which not only has the video, but it also has your agenda right there on the side. You can take minutes. You can take notes. There's a chat. There's no reason for anyone to be switching from tab to tab or not able to screen share this tab with their Zoom. And I know a lot of companies actually have Zoom security concerns anyway. So I would encourage you to check out boardable.com. You can get a free trial, no credit card, no commitment. Just try it for two weeks and if you don't like it, you just let it expire and that's that. Go back to your Zoom and all of that. But you can check that out at boardable.com.

Okay. So what other questions do we have? While you're typing those in, I just want to mention our webinar next month is with Sherry Quam Taylor, who you've probably heard of. She does a lot of great webinars. She's done several for us and then also like Bloomerang and some of our other partners. But she's going to help us. The premise of this one is what if you just keep raising the same amount year after year? How can you get your board to increase fundraising results? So you can join us for that as well. I will put a link to that in the replay email.

But let's go back to our chat. It seems like we have a fair amount of video questions here. Someone asked about the owl, Peggy. We actually had that at Boardable. I feel

like that worked really well. I think it would work well if you had a small group of people. It's a camera that sits in the middle of your table, but it automatically pivots to the person who's speaking. So it can provide a nice experience for virtual attendees for sure. I think it wouldn't maybe work as well if you had very many people in the room because it gets too far away from them at that point if it's in the middle of the table. So yeah, I definitely recommend checking that one out.

Let's see. Danielle, "Time limits per topic and speaker are terrific. And cue cards are great when holding virtual meetings." Oh, interesting. I'm trying to think how you would just hold them up for the camera too, I guess. And then, Whitney, "How does that work for those who are taking minutes? Can that person still be logged into Boardable meeting minutes and the video?" That's a great question. And I think she's referring to our spotlight program there. I believe you can take minutes while you're in the meeting. You would just tab over to a different one of these little things on the side here. I think you would take your minutes there while the videos are still showing over on the other side of the screen and or the slide deck or whatever. All right.

And then, Jamie had another Boardable question. "Can you make your documents fullscreen during a Boardable video meeting?" Yes, you can. I think I have Katie, here I saw her, that she's our customer success expert and could probably answer these questions even better than I can. But yes, you can actually slide this video screen smaller and bigger to make the documents larger over on the left side of the panel. So that's really nice to be able to expand that out. You also have access to all of your documents that are associated with the meeting, as well as a chat. And I'm trying to think what the other...just the meeting information, who all is invited and that kind of thing, too. Ah, so Danielle's got a whole system here for [crosstalk 00:42:45].

**Kim:** These are the cue cards. That's great.

**Caroline:** We had to get green, yellow, and red. I love that. For those talkers on your board, it could be a game-changer to get them to move on with that red, red, red. All right. Anyone have any questions for Kim on conducting these meetings in the most engaging way possible, or want to share things you've seen that have worked or not worked? Now, there's Katie. Thank you.

**Kim:** I just think a couple things just in summary. One is to give yourself some grace as you work through having hybrid meetings with some people in-person and some

people virtual. Give yourself some grace. Figure out what works. Make changes as you need to. And just keep trying new things. You'll find a happy medium.

**Caroline:** Yes. It's a lot of trial-and-error in this day and age. All right. Well, if there aren't any more questions I want to turn my camera back on and say hi to the people who are wondering where were. Kim, I just want to thank you again, for your expertise, and your time, and your great advice here.

**Kim:** No, I enjoyed this. Thanks. And I've written down some great suggestions that I've got from the chat too.

**Caroline:** Yeah. You're going to share those with some other boards. And for everyone else, again, we'll be sending the reply recording, the slide deck, and our hybrid meeting prep checklist. And then, I'm going to try to download these ideas from the chat and see if we can incorporate those as well, so...

**Kim:** That would be great.

**Caroline:** Okay, everyone. Thanks again and have a wonderful rest of your March. And good luck with your hybrid meetings.