Tips for Online Congregational Meetings

Templates, tips & inspiration for successful online meetings

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Nothing here is legal advice!

Goals for this Workshop

- Help your Church hold successful online congregational meetings
- Avoid potential problems & embarrassment
- Comply with your Bylaws & use Hawaii Law to your advantage
- Help your members know how to attend & participate
- Provide templates to help you easily customize a process that works for your Church

Is it Legal to hold our Meetings Online???

- Bylaws – Do your bylaws already authorize electronic congregational meetings?   Then comply with bylaws or amend as needed.
- If your Bylaws appear to prohibit electronic meetings, consult with an attorney; amend bylaws to allow electronic meetings, by using Action by Ballot, by following HRS 414D-104.5
- If Bylaws don't prohibit electronic meetings, adopt board resolutions authorizing electronic meetings, as authorized by HRS 414D-101
- Tip: Save procedural details for board resolutions, not bylaws
- See Handouts, pp. 2-3

Goals of Electronic Congregational Meetings

- Stay safe, don't congregate!
- Do everything that could have been done at an in-person meeting (except the food and hugs)
- Comply with state law, Church bylaws, and Roberts Rules of Order
- Enable participation by as many members as possible
- Be fair, democratic and efficient
- Be the Church – evolve for new needs and modalities of ministry

Hawai'i Law regarding Electronic Meetings

- Members must be able to:
  - Read or hear the proceedings substantially concurrently
  - Vote on matters submitted to members
  - Pose questions
  - Make comments
- Church must implement reasonable measures to verify identity of members attending and voting

- See Handout, pp. 2-3

Board Resolution for Electronic Procedures

- Determine basic structure via a Board Resolution
  - Electronic Platform (Zoom or some other?)
  - Restrict attendance to voting members only?
  - Allow sharing of a device (for households & those w/o Zoom)?

- Delegate details to a small committee (IT, Moderator & Clerk?)
- Refine procedures based on practice & Church's own needs

- See Handouts p. 4

Member Instructions for Meeting

- How and when to register & check-in at meeting
- Type of devices permitted (must be Zoom-capable)
- Device sharing permitted & how to share devices
- How to speak at the meeting
- How to vote at the meeting
- How to get most current Zoom update (Zoom 5.5.1 as of 2/1/21)
- Who to contact for questions

- See Handouts, pp. 5-7, 16-18

Tips for Check-in/Registration

- Include in registration a certification that all votes cast from the device will accurately reflect voting instructions from voting members sharing the device

- Send registration email multiple times, including on morning of the meeting, as members may "lose" the original notice or Zoom link for the meeting, or may forget to register in advance

- Create a list in advance of members with ambiguous "screen names" and re-name them with full names upon entry to meeting

Tips for Voting by Zoom Polls

- Prepare and load Polls in advance, including for all expected motions and for potential unexpected motions and motions to amend

- Practice launching & tallying Polls in a practice group that has a host, co-host and attendees; warning, Zoom has different views for each!

- Allow use of Chat to vote if attendees cannot see the poll

- If allowing shared devices, do not publish Poll results to attendees, Zoom results are only in % and are confusing/worthless

Tips for Raise Hand

- Use Raise Hand to seek permission to speak
- Use Zoom Raise Hand, not human hands nor "Reaction" icons!
  - Reaction icons only stay up a few seconds, don't rise to top of list
- Raised Hands rise in order to top of Participant list, are easy to find
- Raise Hand stays up until attendee or co-host taps Lower Hand
- Use Chat for requests to speak by those who can't Raise Hand

Tips for use of Chat

- Use Chat for check-in, to identify all persons sharing a device
- Use Chat as a backup for anyone who can't use Raise Hand or Poll
- Remind attendees they must tap "Enter" or "return" to send Chat
- Use private Chat for most communications between co-hosts
- Inform attendees not to use Chat except for requested purposes
- Keep a record of Chat to help confirm attendance and voting

Tips for Zoom Account

- Check account settings, revise for desired procedures & security
- Enable screen-sharing by host & co-hosts
- Pre-load Polls and test Polls before the meeting to make sure they launch properly
- Beware: sharing an account between co-hosts can cause Host to lose control if anyone who previously entered the account failed to properly log out of the church account before the meeting

Voting via Zoom Polling

Zoom's Poll voting

- Design & load Polls into meeting account before meeting

- Customize Polls for shared devices, make sure they work properly

- Practice Polls with co-hosts first, then with members

- If Poll is multi-question (for shared voting), remind attendees how to use it, every time a Poll is launched.

- Members must press "submit" before Poll response is recorded

- Host & co-hosts can't vote in Poll, must be un-hosted or use Chat

- See Handouts, pp. 8 and 12-13.

Members without Zoom capability

- Members without a Zoom-capable device can share a device used by another voting member ("Friend")
- Member without a Zoom device calls the Friend; Friend puts their speakerphone next to their device to allow hearing and speaking
- Friend must vote according to voting instructions by Member
- Request advance notice to Church of any use of a Friend, to assure proper check-in/registration procedures and proper voting
- Confirm at time of check-in who is sharing each device (via Chat)
- See Handout, p. 9

Co-Host Planning for Meeting

- Outline all tasks needed for a successful meeting & assign duties
- Make any revisions to Zoom settings and member instructions, as indicated by practice sessions
- Annotate meeting agenda with speakers & Poll #, to assist hosts
- Set deadlines to receive any documents for screen sharing & require font size of 18 point or more

- See Handouts, pp. 10-11

Practice Session for Co-Hosts

- Co-Host practice
  - How to recognize Raise Hands and lower Hands of attendees
  - How to launch a Poll, show what hosts see (and don't see!)
  - How to find and tabulate votes (for Clerk/Moderator)
  - Try screen-sharing & use of documents as planned
    - Font size for documents should be at least 18 point
      - Here is what 12 point font looks like on Zoom screen
  - Understand potential problems caused by different devices and lack of software updates

Practice & Information Sessions for Members

- Hold practice sessions for members in advance of meeting
  - How to use a Zoom link to enter the meeting
  - How to use Chat (to everyone or to a designated person)
  - How to use Raise Hand and Lower Hand
  - How to vote in a Poll (for single users and shared users)
  - How to update Zoom (current version is 5.5.1 as of 2/1/21)
  - How different devices and software updates look on Zoom
- In advance of meeting, provide all written reports and do Information Briefings with Q & A for Budget & other major action items

Registration Questionnaire

- Require pre-registration of voting members who plan to attend
- Send out pre-registration notice multiple times, including on day of meeting (if appropriate)
- Include request for full names of all who will attend on each device
- Include certification that any votes cast on a shared device will accurately reflect the voting instructions provided by members sharing the device

- See Handouts, p. 14

Official Notice of Meeting

- Review Bylaws long before the meeting for all meeting requirements; deadlines and method for giving notice; election procedures; qualifications for officers & directors, and other meeting matters

- Provide an online registration link within the meeting notice

- Include a description of all agenda items (Note: HRS 414D-111 prohibits voting on matters not within the notice/agenda unless 1/3 or more of voting members are present)

- Identify who to contact with questions

- See Handouts, p. 15

Why use Roberts Rules of Order?

- May be required by your Church bylaws
  - Church may adopt special rules to fit your own needs
- Ensures meetings are fair, open, efficient & orderly
- Allows all viewpoints to be heard in a fair manner
- Enables orderly resolution on matters in a democratic manner, in a minimum amount of time, whether your group is in total harmony or has great diversity of opinion

- See Handouts, pp. 19-23

And Now for the Fun!

- Music and/or photos for intermission?
- Celebration/thanks for past and future officers/directors
- Be kind, be patient, be loving
- Virtual hugs

- **Questions??**