Episode 11: Effective Online Meetings

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This is a transcript of Nancy Bacon, Sarah Brooks, and JoAnn Crabtree talking about how to make online meetings effective and engaging on the Nonprofit Radio Show podcast. You can listen [here](#) or however you prefer to listen to podcasts.

Nancy Bacon

Hello, and welcome to the nonprofit radio show, a podcast with tips and tools for small nonprofits. If you feel in the dark about how to run a nonprofit, sunshine is on its way. I'm Nancy Bacon. And I'm joined by Sarah Brooks and JoAnn Crabtree, and this week, we're talking about online meetings. How many meetings a week do you guys go to -- a lot?

Sarah Brooks

A million!

Nancy

A million! I know nonprofit people meet. That's what we do. We meet to plan event. We meet as board members. We meet together with our community, heck, we even meet to figure out how to meet. I'm one of those people who thinks a lot about how we meet. We're all busy. We talk a lot about burnout and how we can do everything we need to do. There are not enough hours in the day. I think our meeting culture is worth looking into to see how we can be more intentional, particularly now that we're online. Let's talk about online meetings.

JoAnn Crabtree

I think we all need to be cognizant of the fact that we spend a lot of time online every day. And that can be really hard to be going from one meeting to the next meeting, especially if there are no breaks in between.

Sarah

Absolutely. And I have to say I don't know about you guys. But I have been on some really boring online meetings where I multitask and catch up on my email. And I have been on a few truly engaging online meetings where I almost forgot I was online.

Nancy

Me too. And I think the really important thing to remember about an online meeting is that online modifies meeting. So, we're talking about meetings and all the rules that apply to a good meeting. And then we put that overlay of being online. So, what I mean is, you need that purpose to come together, that strategy to maximize the brains sitting around the table so that everyone is involved in what you're talking about. You have some way to capture the notes, or flip charts, sticky notes, all that stuff, we need to figure out how to do that online. If we were in person, we would find ways to build community. So, we would be sitting and talking to the person next to us or we would be in a small group to talk about the budget or whatever. We need to do those same kinds of things, even though there's not a plate of yummy baked goods sitting in front of us.

Sarah

Okay, but Nancy, I am not, as we all know, a technology wizard. So how on earth am I going to pull this off? Because what you're talking about sounds like I need to know a whole bunch of social apps or something like that to make this happen.

Nancy

Yeah, there are a lot of tools, aren't there? We get them every day, we keep hearing about new ones. And I know many of us have had to become Zoom masters overnight, right. So, there's a lot that we need to know. And JoAnn can really help us out with some of the tricks. But one of the things that I'm going to start with is just getting comfortable with the technology. Practice in advance if you need to make sure that everybody in your meeting is comfortable with the technology. I was recently in a meeting where there was really a need for people to have breakout groups to get to know each other better. And the board chair was

really, really nervous about that. She had never experienced a breakout. She didn't want to go there, she thought there'd be all these offline conversations. And it took a practice session, we actually practiced what the board meeting was going to be like with those breakout groups. And that made everybody calmer and we were able to move forward. And it was hugely successful.

JoAnn

I think one of the things that's really important is that preparation happens beforehand. So, if anything needs to be charged up, like your portable speaker or anything like that, make sure you do that ahead of time. Whoever is opening the room needs to open it in enough time. So that if there's any problem with technology, then the room is open and ready when other people try to join. It's frustrating to come to a meeting and find out that it doesn't actually start until 20 minutes in because of different kinds of problems. There are so many things that you can do to plan for when things don't go right. In fact, we should be surprised when everything works, and not surprised when it doesn't work.

Nancy

I really like some of the tools that you find on Zoom or any of these other teleconferencing apps. There's annotation tools, there's ways to use other programs like Padlet, and other things in order to capture information. So, know that there are some tools out there to bring people together and connect them with each other. Sarah, how have you experienced meetings?

Sarah

Well, I absolutely feel like that practice point that you raised is so important. Both you and JoAnn talked about making sure people understand how the technology works. And, actually, one silver lining in all of this, I think is that the technology platforms actually can make it easier for everyone to participate. It's hard to interrupt somebody in a teleconference or a zoom meeting, people are pretty formal. And usually I noticed people say, Oh, I'm so sorry, you go

ahead. Whereas in a room, that loud voice can sometimes take over. So I love the idea of thinking ahead of time about how you're going to engage people in conversation and then making sure you've got that one person in charge, whether it's your board chair or committee chair, who really does take advantage of what technology offers and asks each person explicitly like Nancy, do you have a thought now or JoAnn, what does this make you think about? It actually can make it quite a bit more of an equitable meeting in terms of hearing from everyone.

Nancy

Absolutely. Now, that kind of stuff takes some preparation. So, it takes some level of planning to help people to participate. We're all at our computers now, like 24/7. So, I think we really need to rethink how we prepare people for meetings. I was recently asked by an executive director, how she could mix up her executive director report because nobody was reading it. And what I wanted to say is that people are probably not reading it because it's long. And because we're on our computers all day, I really struggled to read yet another document on my computer to prepare for my volunteer board service. So how do we completely reconsider the materials we're sending out in advance to help people prepare. I suggested just a short little dashboard, I can print that out. I can't print out 20 pages, but I can look at a dashboard.

Sarah

We all know I love a good dashboard. Dashboards are an awesome way to get across information really quickly.

JoAnn

Tell us a little bit about what you mean by that. What is a good dashboard? And what is a dashboard period? I have a dashboard in my car… what's a dashboard?

Sarah

Oh, great question. Thanks for asking, JoAnn. A dashboard, yes! It is based on that idea of dashboard in your car where you're driving along at 50 miles an hour, and you look down and you can see everything that's important, right? You know, if you have enough oil, or if your car's overheating, or if you're about to run out of gas, or if you're speeding. It all just kind of flashes up in these short little snippets to you.

JoAnn

So a snapshot?

Sarah

Snapshot. Exactly. Think about taking that same concept and using it for your finances. What are five things someone should know about how we're doing financially right now? And how can I make them readily apparent? Maybe they're color-code: red, they're in trouble, or green if they're good. Can you think about a program: how do we know if it's attracting the right number of people? Are we serving the kinds of people we hope to be serving, or are we having the outcomes we want to have? How do we create a short snapshot?

Nancy

Sarah, you were going to add to this idea of a dashboard? What were your thoughts?

Sarah

Well, I love the idea of thinking about how can we convey information ahead of the meeting, all that reporting information that we need to know so that we get to use that online meeting space as a discussion place, as a place for social interaction. All the information I've ever read says that you should use those gathering times and especially online gathering times for actual social interaction, that's what they're good for. They're not as good for just hearing a report. I've been thinking about maybe asking our executive director to share a 10 minute video update, instead of a report that you have to read ahead of time. What would it be like to just have him speak about the things that are happening in the organization right now or have a

program person to take you out into the field and show what's going on? Those would be engaging ways for a board member to quickly get caught up on what's going on, but in a kind of different and unusual way, and then end that video with the provocative discussion questions they should come ready to talk about in your online meeting.

Nancy

I love how you're moving around time and space -- that's really powerful. That really suggests my third point around planning to revisit that agenda--that online requires a higher level of intentionality, that we often rely on our personalities when we come into meetings that we can drive it, we can read the room, we can move things forward. And you can't do that quite as easily in the online environment. One of the aspects of meetings I talk a lot about in the in-person world that I think is even more important in the online world is this notion of the crescendo and flipping it. So, I often experience meetings that have a crescendo effect--they start out really slowly. Hi, everybody, great to have you. We're going to have the executive director report, we're going to have the committee report, we're going to talk about finances from the event. Towards the end, we have this generative, open-ended discussion about our strategy or about our vision for the future or about a new program idea. It strikes me that at the end of the meeting, everybody's tired. We're out of time. And so then that whole idea gets cut off because of those factors. Why don't we flip it? I like this tool of three to one. So put the amount of brain power needed for each agenda item-- three, high brain power, I need to be fully engaged to medium one, I could be asleep and still part of the conversation. Right now we're at a one to three level. Let's flip it. Let's go three to one to really maximize the energy and engagement when people come together. What do you think?

JoAnn

I like that.

Sarah

I think it's a terrific idea. And I would add that we shouldn't forget to really get that brain warmed up and ready for a level three engagement. Don't lose sight of the opportunity for optional social time beforehand My board, when we meet in person, the meeting always starts at six. But at 5:30, everyone's invited to come early and have soup. And there's something very wonderful about breaking bread together and getting to know each other in this casual, not-required kind of way. We've been struggling a little bit with what to do with that, since we're now online and meetings just start at six. I kind of like the idea of thinking about what if we had an optional join-in time at 5:30, where we'll all bring our own bowl of soup or salad or whatever it is for eating that night. And just having that chit-chat time, because for a board or any group to work well together, they have to know each other and understand what the organizational culture is first, then they're ready for that level three conversation.

Nancy

I love that idea. We're also hearing about post-meeting happy hours, equally fun, anything that you can do to get people connected. You know, engagement is a common struggle. And one solution is to mix it up. If every board meeting is exactly the same, and you have this monitor sitting in front of you that separates you from other people, folks are going to have a hard time staying engaged. A human brain craves novelty, we like things that are new, it snaps us to attention when we see something different happening. So rather than having those meetings where the agenda is predictable, it's the same agenda you've always had, try something new and mix it up.

Our word of the week is people. As much as meetings are about agendas and technologies and reports and making progress and all of that, ultimately, a meeting is about people coming together for generative conversations, decision-making reflection. There's a reason why you need people to come together. There's something bigger than any one individual that has to happen. So, I think meetings are all about people. What do you think?

Sarah

I agree completely. And I think specifically, they're about engaging people. And the best way I know to engage people is to be really clear about the purpose of the meeting. You know, sometimes we just have board meetings, because it's the second Thursday, and we're supposed to have a board meeting. I think we rarely stopped to think about why are we having this particular board meeting? Is this particular board meeting a very important decision-making meeting? Is this particular board meeting more an opportunity to get to know each other if we have a lot of new members? Or is this particular board meeting important for setting things up? Because next month, we know we have an important decision. You're going to engage your people when they know why they're getting together.

JoAnn

Meetings without purpose are so frustrating, because everybody's short on time anyway. And how many times have you gotten somewhere and nobody knows why you're there. So that purpose is incredibly important.

Nancy

Absolutely.

JoAnn

 So what if out of this COVID time came a deeper thinking about meetings and the role they play in the life of organization? What if we expanded use of online meetings even when we don't need to meet online? What if we changed our meeting culture to reduce burnout which allowed us to better achieve our mission? You have such an important mission? You've got this.

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