Effectively Engaging Your Board Remotely

Combined Jewish Philanthropies
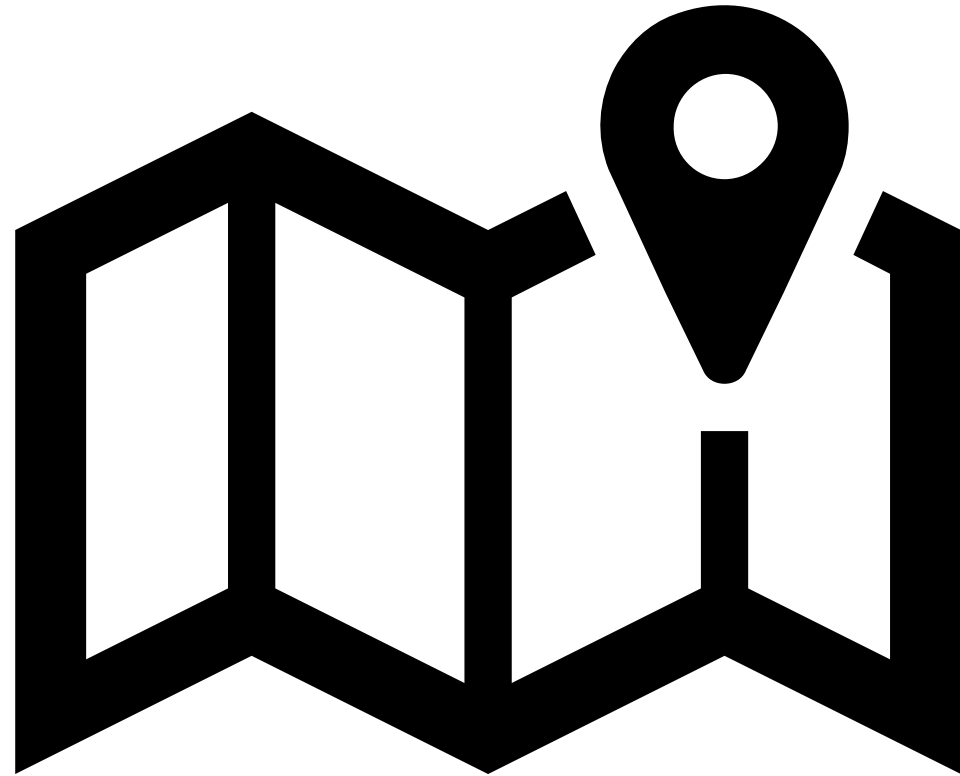
Webinar: March 19, 2020

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Big Picture

What is the Board's Role?

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What is the Board's Role?

- Crisis response is critical
- Look for opportunities
- Create nimble advisory bodies

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Communications

- Regular Updates
  - Formal
  - Informal

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Virtual Meeting

Culture

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Set the ground rules and expectations for meetings

How discussion and questions will be facilitated

Ensure participation

Too much presentation will be particularly exhausting remotely

Acknowledge disruptions may occur

People all working from home

Clear boundaries

Professional dress

Focus on screen/presenter

No outside technology

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Review Technology Platforms

- What virtual meeting software are you using?
  - Zoom, GoToMeeting, Blue Jeans, etc.
  - What limitations are in place if any?
    - Check licenses and participant limits

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Voting Remotely

Voice affirmation

Online Platforms
(e.g. Doodle)

What happens if your bylaws require in person voting?

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Managing Logistics

Test everything beforehand!

Assign a meeting logistics facilitator to manage

- The participant chat window
- Mute/unmute
- Assisting with technical issues during meeting

Meeting Norms

- Lay out at the start of the meeting how to best participate in the meeting.
  - Presentation style meeting
  - Collaboration style meeting
  - Mixture of both – layout the timeline
- How will participants ask questions

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Virtual Meeting

Running an effective virtual meeting

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Running the Meeting

Assign a meeting logistics facilitator to manage

- The participant chat window
- Mute/unmute
- Assisting with technical issues during meeting

Meeting Norms

- Lay out at the start of the meeting how to best participate in the meeting.
  - Presentation style meeting
  - Collaboration style meeting
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Questions

Virtual Meeting

Creating An Effective Slide Deck

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The Welcome Slide

- The first slide in a deck should be the landing slide for the meeting

- Use the title of the meeting, date of meeting, and logo

- Begin screensharing before the meeting begins

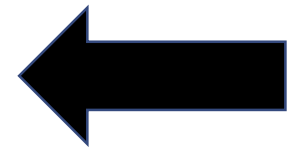- Consider sharing the meeting norms information on this slide as well

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Board of Directors Meeting

March 5, 2020

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Participants Arrive to a Meeting Screen

Board of Directors Meeting
March 5, 2020

Zoom participants will appear here

One Slide Deck

- Before any meeting collect all slides
  - Multiple topics
  - Different Presenters

Know the Deck

- Before the meeting, if possible, print out the deck
  - You will know the order of slides
  - Understand the flow

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Spacer Title Slide

- A spacer slide is inserted in between sections.

- Serves as a landing slide in between topics.

- Conversations move forward before arriving at next topic.
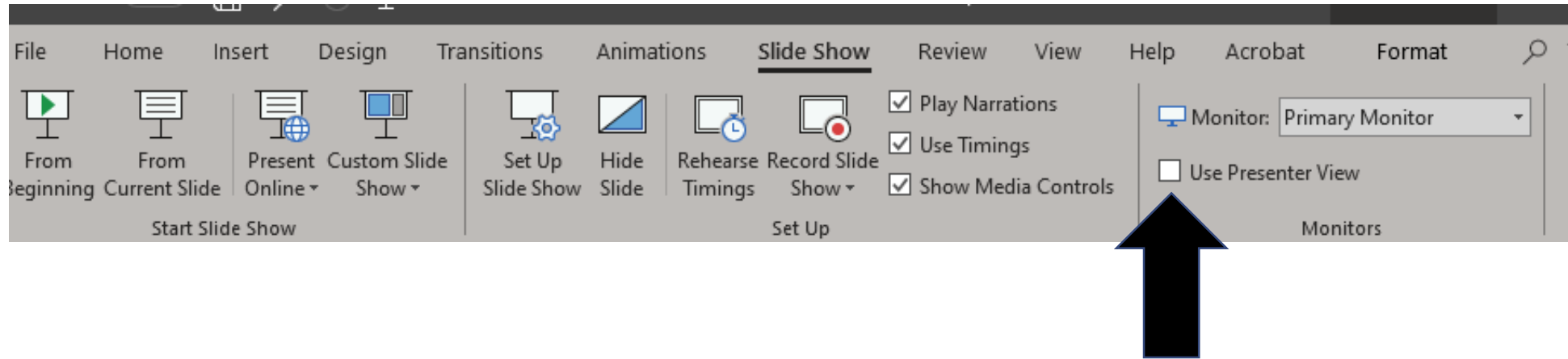
- Use liberally throughout presentation

Presenter View

- Presenter View is a PowerPoint Feature that can be complicated
- To override Presenter View:
  - Slide Show → Monitors → un – check Use Presenter View

Arrive Early

- As a meeting host, arrive early to the zoom call.

- Participants will know they have arrive in the correct meeting.

- Set up screen share and prepare to welcome participants.

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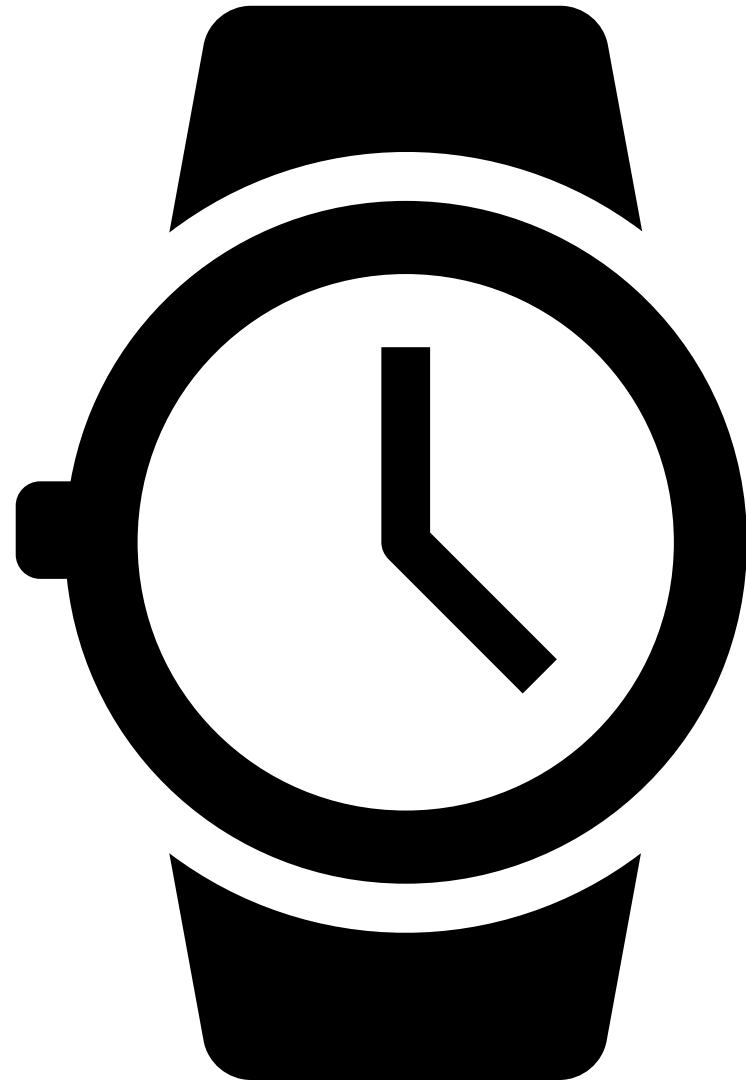
Thank You!

Marni Allen, Associate Vice President, Board and Volunteer Leadership and Engagement: MarniA@cjp.org
Joanna Feldman, Manager, Board Relations: JoannaF@cjp.org

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