Effectively Engaging Your Board Remotely

Combined Jewish Philanthropies
Webinar: March 19, 2020
Big Picture

What is the Board’s Role?
What is the Board’s Role?

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

- Regular Updates
  - Formal
  - Informal
Virtual Meeting
Set the ground rules and expectations for meetings

- How discussion and questions will be facilitated
- Ensure participation
- Acknowledge disruptions may occur
- Clear boundaries

- Too much presentation will be particularly exhausting remotely
- People all working from home
- Professional dress
- Focus on screen/presenter
- No outside technology
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
Voting Remotely

Voice affirmation

Online Platforms (e.g. Doodle)

What happens if your bylaws require in person voting?
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
Virtual Meeting

Running an effective virtual meeting
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
  • Mixture of both – layout the timeline
Questions
Virtual Meeting

Creating An Effective Slide Deck
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

Board of Directors Meeting
March 5, 2020
Participants Arrive to a Meeting Screen

Board of Directors Meeting
March 5, 2020
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
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.
Thank You!

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