

Setting up and Facilitating Successful Virtual Meetings

As TJCOG and many other organizations adapt to changes from COVID-19, we must adapt to increased use of virtual technology and meetings. Check out these tips and suggestions for making your meetings as seamless and valuable as possible!

STEP 1: Prepare the Functionality



- Only use technology needed. Don't over complicate.
- Video software is best for sharing screens or candid discussion
- No need for group discussion? Mute participants and utilize chat boxes.
- Want to share later? Set to record!

STEP 2: Make an Agenda and Guidelines



- Assess how information needs to be altered or presented.
- Use visuals, if possible.
- Provide time estimates for items.
- Identify questions that need discussion and decisions.

STEP 3: Test and Prep Equipment



- Test, test, test!
- Ensure functionality is set as needed (e.g. mute set or volume on, share screen options available)
- Encourage participants to log-in early.

STEP 4: Follow Etiquette Do's and Don'ts



- Provide a visual agenda or guidelines on screen.
- Offer additional time and pauses for feedback or questions.
- Speak slower than normal.
- Review with attendees how you plan to lead.

STEP 5: Engage or Facilitate Discussion



- Identify/engage those you know you need to hear from on specific items.
- Encourage chat box use for those less likely to speak up.
- Formalize the water cooler with collaborative chat at the end.
- Limit "speechifying" or one person speaking too much.

STEP 6: Identify Next Steps & Follow-Up



- Wrap up conversation deliberately - ensure agreement, open items
- Explain next steps
- Send out notes or written deliverables
- Encourage ongoing communication

Other Resources for Great Virtual Meetings

[10 tips for giving an effective virtual presentation](#)

[Improving your virtual meeting skills](#)

[7 ways to run a virtual meeting](#)

Holding Public Meetings in Accordance with Senate Bill 704

STEP 1: Before the Meeting



Provide advanced meeting notice, following existing guidance for notifying the public under G.S. 143-318.12. Include details on how the public can access the remote meeting.

Provide all documents to all board members prior to meeting.
If applicable, make sure presentation capabilities are restricted to designated individuals and prepare the meeting for recording (not required).

STEP 2: Launching the Meeting



Ensure meeting is simultaneously available to the public by an audio stream, dial-in conference line, or video live stream. (YouTube has easy livestream functionality)

Make sure all Board members hear all communication during the meeting from fellow members and the public.

Have a staff member or meeting lead review guidelines including: conducting roll call, identifying actions and votes, and mute. (*Virtual Meeting Best Practices*)

STEP 3: During the Meeting



Reference the specific item or section of the agenda to identify what is being discussed or acted on.

Vote by roll call. Board members count for quorum/votes only while active on the remote meeting. No votes may be taken by written or secret ballot Board members that cannot be seen must say their name a) during roll call, b) prior to taking any action, and c) prior to voting. (*a good practice for all*)

Closed sessions may be held in accordance with G.S. 143-318.11; access to the public is not required during this time.

STEP 4: Holding Hearings



Quasi-Judicial Hearings can be held if a) the right of an individual to hearing and decision occur during emergency b) all persons participating in the hearing have been notified of the hearing and consent to a remote meeting.

Public Hearings can be held, as long as comments are accepted between the initial request for comments and one day (24 hours) after the meeting ends.

STEP 5: After the Meeting



Ensure meeting minutes reflect a) that it was done by simultaneous communication, b) which board members participated by simultaneous communication, and c) board members who came or left during meeting.

Make note of technical challenges and adapt for following meetings.

**All chats, instant messages, texts, or other written communications between members of the public body regarding the transaction of the public business during the remote meeting are deemed a public record.

**If you chose to record, please note the recording must be preserved until the meeting minutes are adopted.