Quick & Dirty: Going Virtual Fast & Well
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It's been said to never waste a crisis and that moment is upon us. As organizations think through how to do what they do in this pandemic moment, so must boards quickly move from face-to-face to virtual meetings – and many are floundering. Here's my quick advice for Heads and board chairs to work together to go virtual fast and well; and while I think much of this applies always—and is just good practice—these tips matter now more than ever.

The agenda:
1. Ask, "What does the Head of School need at this meeting?" This means, decide what is *essential* for the meeting and cut all fluff. Niceties are nice but unnecessary right now, so don't worry, board and staff get that.
2. Use a consent agenda for standard committee reports, the Head's report (or portions thereof); prior meeting minutes; event calendar).
3. State the meeting's objectives up front and design a tight agenda to meet them. Boards appreciate clarity, in crises moments more than ever.
4. Send/post to the board portal all materials at least a week in advance. This would include the agenda; the most critical questions that board members should think about and be ready to discuss at the right time on the agenda; any PowerPoints or other reports.

The meeting:
5. Establish ground rules up front – online prior to the meeting and again at the outset. The chair should be clear about what needs to happen in the allotted time and how to keep things moving. Because airtime matters more than ever, some (new, for many) norms should be stated, such as:
    a. No repeat rule: No one should repeat themselves or restate what someone else has already said.

    b. No dominance rule: No one should hog, or be allowed to hog, the limited airtime.
    c. No soap box, prognostications, or pontificating rule: self-explanatory.
6. Remind everyone to state their name when they start to speak so it's clear who it is. For votes, it's especially important to be sure it's clear who makes the motion and who seconds it, number of 'yeas' and 'nays' and abstentions.
7. If using PowerPoint, keep it short and simple and send in advance with instructions for board members to read it and print it so they can follow along during the meeting because the slides will not be shown on the screen. The screen will be filled with small images of all meeting participants (see 11a).
8. Use instant polling if, and only if, that's something you know how to do and can do appropriately. It can be a good way to engage the board—as a collective, in the moment—on perspective views on important matters. Polling allows you to quickly see how aligned or disparate the board's thinking is on various matters.
9. Draw everyone into the conversation. This will be more difficult with large boards but, just as in face-to-face meetings, it is essential. Not everyone has to weigh in on every issue, but you do need to ensure that everyone has had a chance to raise critical questions and engage in the dialogue.

Logistics:
10. Ensure that the chair is virtual meeting competent and in charge. Board members take their cues from the chair and now is the time for the chair to demonstrate calmness, confidence, and competence.
11. Provide training for all board members in advance of the meeting—ideally well in advance of the meeting. If there's not time, ask everyone who is unfamiliar with your virtual meeting platform to log in 15-20 minutes prior to the start time to learn the basics. You should also send written notes on your virtual meeting platform's basics. Ensure everyone knows:

a. How to use the camera and 'unblock video' on their computer. Great virtual meetings require that everyone can see everyone else (even if only small view). When some are on video and some only dialing in, things get very challenging and small technicalities become annoying distractions or snowball into bigger issues that you don't need right now.
b. The mute/unmute feature and is hyperaware to ensure that when speaking they are unmuted.
c. Other essential features like raising your hand when you want to speak (some platforms have a little 'hand' icon that shows up by your face on the screen); getting back in if disconnected; and the polling feature.
12. Keep the meeting to two hours or less; if you need three, provide a break halfway. Think this one through carefully because if you take a break you run a couple of risks: 1) time slippage / lost efficiency; and 2) engagement and/or attendance slippage.

In conclusion, virtual meetings place a premium on Head and board chair leadership; the Head-chair relationship; the chair's ability to lead productive and inclusive meetings; and the board's effectiveness as a governing body.

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