



Virtual Meeting Guidance/Best Practices 2020

This document was created to help the individual creating the meeting and the meeting participant to have a seamless virtual meeting experience.

Scheduling a Meeting

1. Locate a virtual meeting platform that works for your organization. Many platforms are offering free meeting/video conferencing but may have limited options, maximum number of participants, or maximum time limits. Check their plan options before selecting. The three top free platforms are listed below.
 - a. [Zoom](#)
 - b. [GoToMeeting](#)
 - c. [Cisco WebEx](#)
2. After the platform is selected, you will need to create an account and may need to download the conference platform.
3. Once you have an account, you can schedule your meeting. The scheduled meeting will provide a phone number, a unique meeting ID, and a link to send to your contacts. Some meetings may also require a password, so remember to send this along as well.
4. If you have never hosted a virtual meeting or you are using a new platform, you may want to schedule a practice session before your first meeting to test sharing your screen, muting participants, monitoring chat, etc.
5. As with in-person meetings, it is always helpful for the participant to receive a reminder before the meeting.
6. Send any documents needed for the meeting before the meeting begins.

Hosting a Meeting

1. Always sign into the meeting a few minutes early to ensure technology is working appropriately.
2. Ensure you are in a quiet, distraction free location before you start your meeting.
3. As the host, you have several ways of managing your participants in most platforms:
 - a. Share your screen – If you have an agenda, a presentation, or other documents, you can share your screen with participants.
 - b. Mute the participants – Once the meeting begins, you will have the ability to mute participants. This will help to reduce background noise during the meeting.
 - c. Monitor the chat – Most platforms offer a chat function. If you choose not to monitor the chat, make sure your audience knows it will not be monitored.
4. When you start your meeting, explain virtual meeting etiquette (rules) for your meeting based on your needs. Example: make sure your audience knows if they can speak freely at any time or if you will set aside a certain time for open conversation.

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Meeting Participants

1. Joining a Meeting
 - a. If you plan to join a meeting via video, it is recommended that you download and install the platform application before the meeting or webinar.
 - b. Most virtual meeting platforms will have the option to join with audio or video. Using a tablet or laptop with a camera is recommended to ensure the best meeting experience.
 - c. Ensure you join in a quiet, distraction free location before joining the meeting.
2. During the Meeting
 - a. The meeting host will have the option to mute your audio, but you may want to mute audio yourself as soon as you join to reduce background noise.
 - b. It can be easy to become distracted during a virtual meeting. Take care to silence your phone, try not to multitask, and remain present.

Other Considerations

1. Voting
 - a. If your meeting requires votes of a board or a membership body, refer to your organizations' bylaws to determine how this voting can take place. Some bylaws may restrict voting to in-person meetings only, or to any meeting by which participants can speak and hear each other simultaneously. Others may allow voting by electronic means (such as email or electronic ballot).
 - b. If your bylaws need to be updated to allow for your organization to conduct business virtually, please refer to your bylaws for the process by which they can be updated, and also refer to state statute to ensure compliance.
2. Minutes
 - a. In accordance to your bylaws, if your virtual meeting can be considered an official meeting, minutes should be taken to record the events of the meeting and sent to your board or membership body after the meeting.