



Steps for Success: Running Online Meetings

The COVID-19 Pandemic has brought about an unprecedented time in our nation and the world. Society is forced to adjust to a new reality; Boards and the associations they manage are no exception.

One such adjustment made by most Boards has been the need to move meetings to an online platform or, at minimum, a conference call. For many Boards, this is new and uncharted territory. Online meetings have the potential to be a great medium; however, they may also be fraught with issues ranging from technical difficulties, inability to decipher who is speaking and actions/motions being made, as well as missing the dynamic of in-person interactions. Initial reports indicate that Boards are seeing several positives from this new format, such as more efficient meetings and the ability to meet during lunch or other convenient times, thus reducing time away from personal activities or family.



So that Boards can continue to conduct meetings in the face of social distancing, Sentry Management has provided all our clients the ability to utilize GoToMeeting (GTM). This online meeting platform can be used from a variety of devices including computers, iPads, and mobile phones. Board Members, managers, and homeowners can download the app for free.

While an online meeting or conference call may never fully replace the in-person dynamic, some measures can be taken to ensure any such meeting is effective, efficient, and successful. Below we've listed a few hints for planning, conducting, and capturing the meetings. We've also put together a quick reference tool to aid in understanding the features and tools within GTM.

Prepare for the Meeting

Create the agenda – The agenda should provide sufficient time to handle the business affairs of the association. Board Members and the manager should review the agenda and make sure each person has the necessary information at hand. Determine before the meeting if an open forum will be allowed and the necessary time required.

Test technology and familiarize yourself with the tools available - As noted, the platform utilized and provided by Sentry Management is GoToMeeting. A quick reference tool for the use of GTM has been posted in the information center. Taking time to review this ahead of time will help avoid the various technical difficulties that can happen during an online meeting. A best practice is to test the technology ahead of time to ensure that audio and video are functioning

properly. PRO TIP: The manager and host (if not the manager) will want to log in to the meeting at least 5 minutes prior to start time.

Notice of the meeting – Notices should be provided following state statutes and the association's governing documents. As soon as the meeting date is set, an invitation to the specific online platform to be used should be emailed to all prospective attendees. The electronic invitation can include the Board, as well as homeowners/members, vendors, and other guests if it is an open meeting. Include a link to the online platform and be sure the invitation sends a password, if necessary.

Open the Meeting

Designate a chairperson – Generally, the President, will be responsible for running the meeting, keeping everyone on track, and ensuring actions are conducted according to Robert's Rules.

Determine who will be responsible for taking the minutes - This individual may be the Community Manager, Secretary, or, in some cases, another member of the Board. It is important to confirm who will be responsible to take the minutes. Remember that minutes are a record the actions taken by the board and do not need to be a word-for-word record of all discussion.

Establish ground rules – Make an opening statement to include a discussion of how the meeting will flow as this is new to most everyone. Ground rules should be established, such as raising your hand to provide a comment or how questions will be submitted. It will also be important to acknowledge the challenges that might be faced and how they will be handled, such as multiple voices at once. A best practice is to designate a meeting moderator who can monitor the chat function, if necessary.

Follow the agenda - It will be critical to staying on track by following the agenda items and limiting the conversation to the business at hand. Remember that most attendees will be working from home, with various distractions (children, pets, dinner cooking, etc.). Keep discussions short, to the point, and upbeat if possible.

Set parameters for making motions – Outline the process for making a motion at the beginning of the meeting. The method may include members saying their full name when they are the first or second, as well as providing a complete recap of the motion once it has passed/failed so that the minutes accurately record all motions.

Establish a system to speak – Remember in school when you had to raise your hand and wait to be called on? A similar system is encouraged to avoid too many people talking over each other. An example would be to have the person say their name when they have something to say. The chairman would then call on each person and allow her/him time to speak. A time limit on comments should be established.

Structure of the open forum - The chairman can announce that this is the section where members may speak about their concerns, issues, or questions. The chairman is encouraged to establish a maximum time to speak, such as 3 minutes. Remember that the Board is not required to engage in discussion on topics brought up during open forum, as this can sometimes devolve into off-topic and off-agenda items.

Meeting Recap

Once all listed business has been discussed, it may good to review the motions made and action items noted during the meeting. The summary will ensure the various parties responsible for action items are aware of their responsibility – which may have been difficult to ascertain during the discussion itself.

The practice of holding meetings online, or by conference call, may seem daunting. With a little preparation, structure, and support from the Sentry Community Manager – we believe these meetings can be nearly as, if not entirely as, successful as the in-person version.

The information contained in this article is provided for informational purposes only and should not be construed as legal advice. No recipient of this content should act or refrain from acting without seeking the appropriate legal or other professional advice.



Bo Stewart and Michelle Meyer each hold the role of Director of Training and Development at Sentry Management. Together they work to improve upon the training initiatives of the company as it relates to Community Association Managers and Board Members. Bo Stewart began his career in the home building industry and for the last 15 years he has focused on association management, resort

management, and division leadership. Michelle Meyer began her career in association management in 2009; she is a Certified Manager of Community Associations (CMCA®) and Licensed CAM in the State of Florida.

***The Community Builder* is a newsletter prepared exclusively for Board Members of associations managed by Sentry Management. If someone on your Board is not receiving this newsletter, they can be added by entering or updating their email address in the CommunityPro®PORTAL.**