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## Holding Remote Board Meetings During a Crisis: Best Practices for Public Education Leaders

*A crisis event that prevents governing bodies from holding live meetings can significantly impact governance continuity. As a company firmly committed to modern governance, we understand the substantial disruption that such challenges can present. To help public education leaders navigate through the uncharted waters presented by the COVID-19 pandemic, we've put together some best practices for holding remote board meetings during a crisis.*

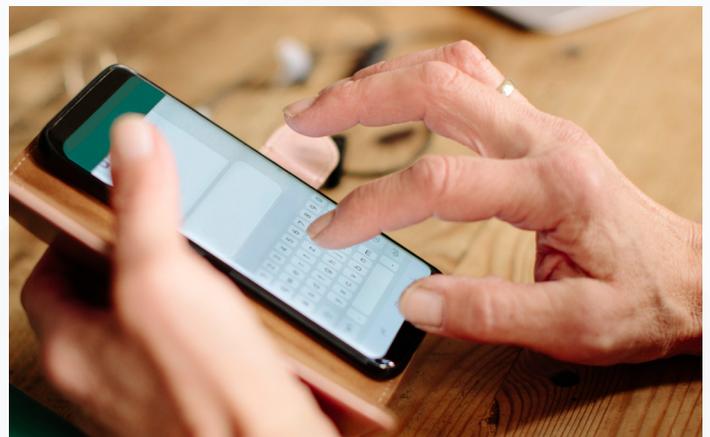
Choose a web conferencing service that supports live streaming. For example, some web conferencing products such as Zoom have live streaming integrations with YouTube or Facebook Live so that you can have your board members log into the web conference, yet allow the public to attend the meeting through the live stream. We recommend publishing information about how to access the live stream on your website, the agenda, or social media sites.

Develop standards and protocols, ensuring that phones are silenced, and background noise is minimized. Have board members practice proper meeting etiquette to avoid talking over one another, allowing the board chair or moderator to recognize speakers and allot speaking time in a manner similar to protocols in an in-person meeting setting. Remind board members to speak clearly, be pleasant, and put their audience at ease, especially given that this may be a new and unique experience for many who attend.

Prepare the computing devices well in advance, ensuring that they have proper connectivity and that all software and security updates have been run prior to the meeting. Verify that device batteries are functioning properly and that participants have power cords and working headsets, as well as any other components necessary to ensure smooth and reliable device operation.



Designate a person to host the meeting and manage the sharing of a computer screen during the session. We suggest that if using minutes, this person should be someone other than the moderator so that she or he can focus on populating relevant content.



Determine what you will want to show during the meeting and have it available on the host computer for display through the web conferencing software.

Verify that board members can make use of devices equipped with cameras during the meeting, and then ensure that the cameras are turned on. Coach board members to make sure that their chosen meeting space is as presentable as possible since the background will be on camera.



Meet with each board member individually prior to the board meeting to verify their Internet capacity. Also, take time to assess their comfort level with joining a meeting, enabling their audio, and turning on their cameras. Provide documentation to assist them in utilizing the technology as appropriate. Remind them of proper protocol related to avoiding the use of chat capabilities in the web conferencing software during a live meeting. Instruct them to close all unnecessary software during the meeting to maximize bandwidth and keep distracting notifications from displaying.

Record the stream or use the web conferencing software's recording capability to record the meeting, ensuring that the video is saved locally after the

meeting has ended so that it can be posted on hosting services like YouTube or Vimeo (and synchronized with the BoardDocs meeting agenda!).



## In Summary

Successful remote meetings are entirely possible with proper preparation and practice. We hope that these guidelines are useful as you consider your options for maintaining continuity during the COVID-19 crisis. As a cloud-based service, BoardDocs provides the tools necessary to host your agendas, policies, and library documents for easy consumption by the public. However, if remote board meetings become necessary, live simulcasting of a board meeting will require the use of other technologies in concert with BoardDocs.

**Disclaimer:** To ensure compliance with national, state, or local legal statutes, readers should seek the advice of legal counsel regarding the permissibility of holding remote board meetings in their areas prior to employing these guidelines.

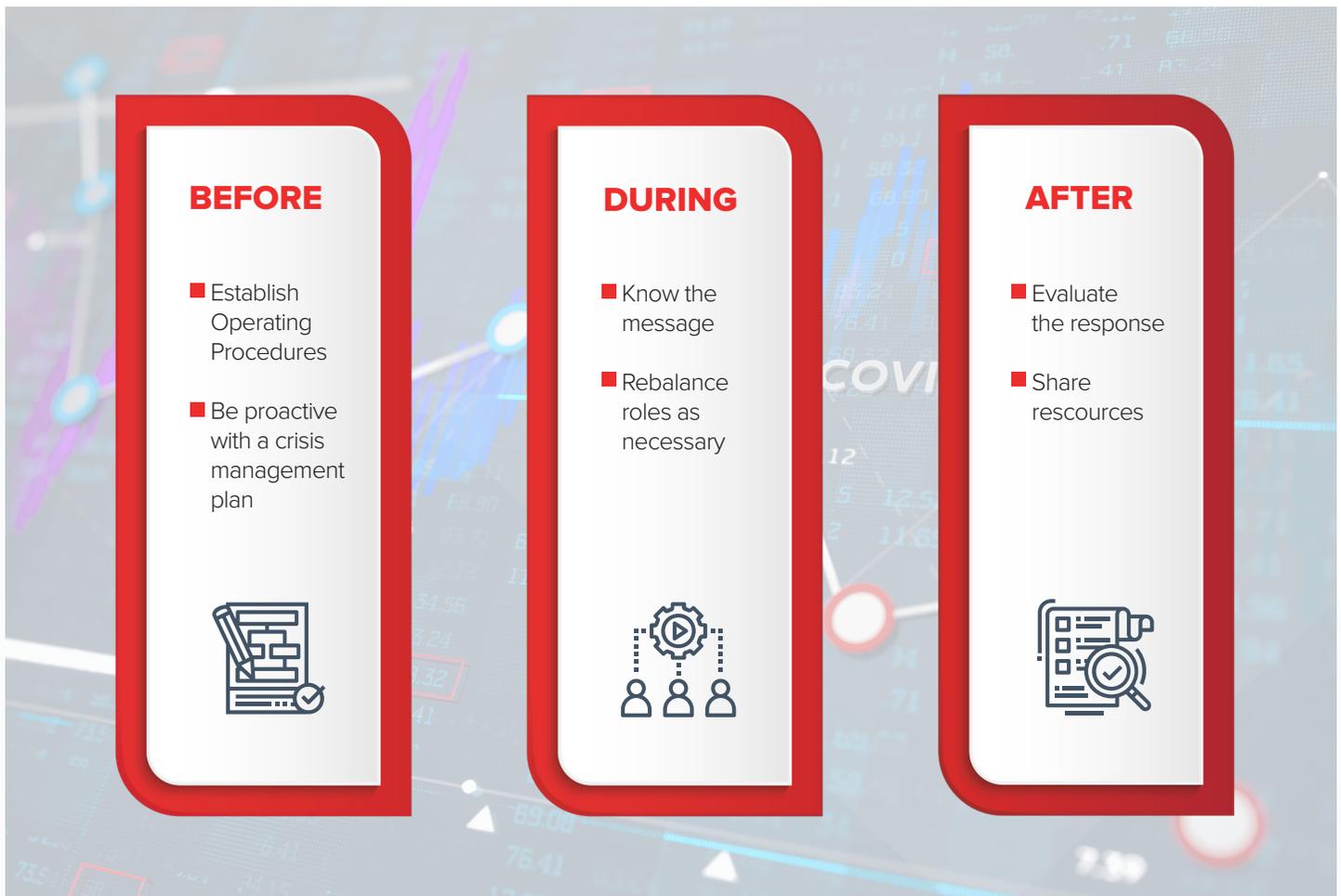
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# Leadership and Governance in a Crisis



## Before:

The time to establish Standard Operating Procedures is before a crisis strikes. Having a document that outlines expectations and agreements by board members helps a district be prepared for high visibility situations. Written board operating procedures are intended to define clearly how to carry out regular board tasks. They can contain information from how to get an item on an agenda to the procedures for visiting a campus. In times of crisis this document should be the definitive guide to communication and chain of command.

A crisis management plan can be a part of standard operating procedures. Board members should realize that it's necessary to have a plan in place but should also realize that they should not put too much credence in them. While many crises are predictable, the real issue is the stealth crisis that comes out of nowhere. The one thing they are good for, and that should be embraced, is laying out the processes the board and management will use in crisis. It's a starting point for the organization's response.

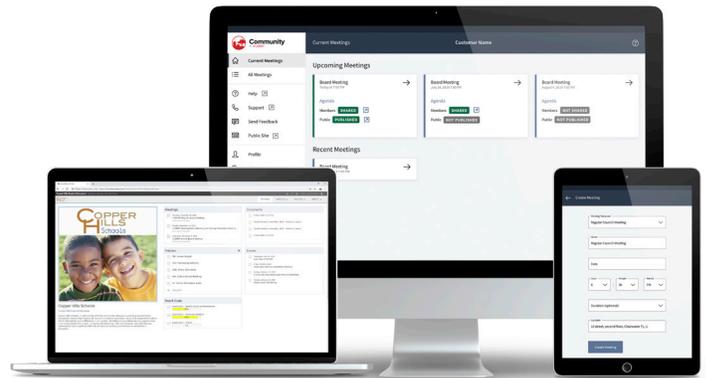
## During:

Be consistent in messaging. There needs to be one source for the message, and it should come from the organization. Every member of the board and administration should be familiar with the message so they can echo the single message. Cancellations and closures are management decisions and should be left to the operational or administrative manager. In times of crisis, the community will be looking to governmental response to gauge their individual response. If in an emergency, the community leaders react calmly, chances are the community members will follow suit.

The role of a board at all times is to govern and oversee the management. This often allows for information to be supplied by administration and questions to be asked by the board. However, in the midst of a crisis, immediacy must rule. Board members must realize they may not be informed about every issue the public will expect them to know about. In a crisis a board should be mining for more information. Each board must find its own new balance with management on how to increase its oversight to appropriate levels. While a board member should not assume managerial tasks or speak for the board, boards may need to exercise more discretion in taking complaints seriously. Board members can take time to connect to the public and share the message of the district. They can monitor the response and community feedback to assure that management provide a successful and fair resolution to issues the board observes or is alerted to. That being said, amid the crisis is not the time to publicly challenge the manager. The message should be unified, but the board members should stay in touch with the administration and meet as necessary to address the emergency business of the council and for the overall welfare of the organization.

## After:

The board should evaluate the response of the organization to the crisis. Once the dust clears, the board should take what it has learned and look at their policies, revise policies that inhibited process or progress. Recognize where policies were not serving the board in terms of current technology and surprise issues that surfaced during the crisis. They should also take the time to examine their vision and beliefs. Focusing on these in the midst of any crisis will allow the board to coalesce around the message they want to send before panic and uncertainty overwhelm the public.



As organizations begin the recovery process, the lessons learned, products that supported board, processes that served them well, should be shared with surrounding or other impacted boards. In a response to a crisis, the documentation of what worked may serve another organization in a similar crisis down the road. We are all better together. Sharing best practice may allow another organization to shave moments off of their response in a crucial time.

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# Communication Tips in a Crisis

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## One point of contact

A centralized message should be consistent and unified. The administrator of the organization needs to be the point of contact in a crisis

A crisis management plan can be a part of standard operating procedures. Board and Council members should realize that it's necessary to have a plan in place but should also realize that they should not put too much credence in them. While many crises are predictable, the real issue is the stealth crisis that comes out of nowhere. The one thing they are good for, and that should be embraced, is laying out the processes the board and management will use in crisis. It's a starting point for the organization's response.



## Appropriate message for the appropriate audience

Levels of security need to be inherent in any information. What is shared with the public, internal administration, employees, and the public will vary for reasons that range from emotional well-being to HIPPA concerns. Platforms that allow confidential information to be shared with the board are necessary in the midst of a crisis.



## Equity in information

When sharing information with a council or board, each member should generally receive the same message at the same time. A mechanism to communicate the most up to date response is necessary for board and council members to stay abreast of fluid and fast moving situations.



## Immediate response and regular updates

With the ubiquity of social media and access to news, organizations realistically have no more than 15 minutes to half an hour to publicly respond in some way to a crisis – even if that response is “We just don't know yet, but are doing everything in our power to find out immediately. We will stay in close communication with you as we do.”



## Reassure the public

Communication in the time of crisis needs to be conveyed calmly. Connecting with constituents in as personable format as possible can help to keep the public assured and confident that the crisis is being dealt with. Video or live reports are often reassuring to the public impacted by the crisis.



### Convey facts

Avoid news reports that have not been verified. Many reports can snowball and relying on popular media can result in sharing incorrect or outdated information. Report to the public a truthful statement of the status, what the plans are to address the situation, and what other entities are being included in the response.



### Directly communicate when needed

Information that needs immediate attention should be sent directly to users. If a response is needed, broadcast platforms are not the optimal means. Use text, email, or other agreed upon channels to convey information requiring reply.



### Demonstrate positive leadership

Use communication tools to be uplifting and hopeful. A positive response will best help a community deal with panic. Share messages of hope and compassion. Demonstrate the best of human nature that emerges in times of crisis. Find the good and build on it.

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