

Conducting Formal Meetings Virtually

A Guide to Emerging Best Practices



Purpose of This Guide

Contemporary organizations are going remote, rapidly provisioning virtual capabilities and workflows designed to accomplish what have traditionally been physical tasks; quickly exposing clear distinctions between informal and formal meeting needs. Formal meetings demand functional tools built to support the meeting administration and govern participants' role-based rights and privileges. The purpose of this guide is to share emerging best practices for the conduct and management of virtualized formal meetings.

What This Guide is Not

This guide is NOT an authoritative source for Robert's Rules of Order or any technical aspect of Parliamentary Procedure. This guide is NOT the LAST word in formal meeting virtualization. Instead, the FIRST word in a developing conversation that will determine a more lasting and comprehensive set of best practices.

Robert's Rules of Order

Robert's Rules of Order is the standard reference for deliberative assemblies operating within the framework of Parliamentary Procedure.

Parliamentary Procedure

Parliamentary Procedure is a framework for conducting the business of a deliberative assembly in such a way as to protect the rights of individual group members, the majority, the minority, absentees, observers, and all parties collectively.

Types of Formal Meetings

Regular	Comes together on the dates and times specified in the bylaws to discuss any business that arises within the scope of the assembly.*
Special	Meets at an irregular time and date; deals with urgent business that cannot wait until the following regular meeting.*
Adjourned	A continuation of a prior session or special meeting; takes up the business that was interrupted with the adjournment of that prior meeting.*
Annual	Convenes once each year, usually to give the various reports of officers and committees.*
Executive Session	Occurs in private, for the purpose of conducting executive business.*
Public Session	Takes place in public, even if the public is not a member of the assembly.*

*SparkNotes, 2006

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Webex Products

Webex Meetings



Provides an engaging, highly interactive way to meet face-to-face with colleagues, partners, and customers over an IP network.

Webex Teams



A cloud-based app for continuous teamwork with videoconferencing, meetings, group messaging, file sharing, and whiteboarding. Webex Teams allows all participants to access a single space for meeting, messaging, whiteboarding, and collaborating. Webex Teams is configurable to enforce policies to protect sensitive content.

Webex Events



Host powerful, interactive on-line events and webinars for up to 3000 participants.

Webex Roles

Host



A host is responsible for coordinating and controlling a meeting or event. A host can also assign roles to other participants in the session. The host role can be reassigned once in a live session.*

Presenter



A presenter is an attendee who is designated as a presenter by the host and is responsible for sharing content.

Attendee



A meeting attendee is anyone in a Webex Meeting. They are able to use the Webex features, including muting, screen sharing, and video. In Webex Events, the attendee role is more limited unless the host or presenter grants privileges to an attendee. Panelists are a type of attendee that are only present in Webex Events. They are primarily responsible for assisting the presenter and participating in presentations.*

*Webex.com, 2020

Types of Meetings

A deliberative assembly is an independent or autonomous group of people meeting to determine, in full and free discussion, courses of action to take in the name of the entire group. Depending on the mix of roles or membership, many combinations of Webex products may meet your formal meeting needs. Absent specific knowledge of meeting needs, this chart provides general guidance.

Mass Meeting

A meeting of an unofficial group of individuals who have a common interest in a particular purpose or problem. A series of mass meetings may be held to organize a permanent society. Everyone who attends the meeting and is in agreement with the common interest has a right to participate.*



Assembly of an Organized Society

A local branch of a state, national, or international society. Participation is limited to those who are voting members.*



Convention

An assembly of delegates chosen to represent constituent subdivisions for one session. Delegates who have the proper credentials are entitled to participate.*



Legislative Body

Lawmaking bodies chosen for a specific period of time (e.g., Congress).**



Committee

Bodies that are usually very small and subordinate to an assembly or board (e.g., a congressional committee).**



Board

An administrative or managerial body of appointed or elected people. It may be the organization's supreme governing body, or it may be subordinate to the general membership.*



*SparkNotes, 2006; ** Business Barcharts, Inc., 2011

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Key Features

Virtual Meeting Features	Supported Platform	Role-based Functionality
1 Expel participant		H
2 Mute all		H
3 Mute participant		H
4 Participant list		H P A
5 Polling		H P

Key Features

Virtual Meeting Features	Supported Platform	Role-based Functionality
6 Raise hand		H P A
7 Record in the cloud		H
8 Record on computer		H
9 Screen sharing		H P A
10 Transcriptions		H

This feature list represents a select list of options perfect for formal meetings. Visit [webex.com](https://www.webex.com) for a full list of advanced features and their functionality, including livestreaming, whiteboarding, and closed-captioning.

Conducting a Virtual Meeting

Procedure	Definition	Webex Equivalent
Call the meeting to order	To start a meeting, the chairperson of the meeting must call the meeting to order by taking their position and saying, "the meeting will come to order."*	Chairperson mutes all (2), unmutes (3) their line, and calls the meeting to order.
Call for the orders of the day	In which the assembly adopts its agenda or order of business.*	Chairperson confirms the order of business, with an option to use the screen share function (9) to display the agenda, and requests a vote; the first member to use the raise hand function (6) is said to have called for the vote; unmute all (2) members to take a voice vote and confirm agenda.
Reports of officers, boards and committees	Reports from officers, boards, and committees; may contain information or recommendations for actions.*	Chairperson individually recognizes each speaker in succession; unmuting (3) each for report, presentation, and repeating the process until all presentations have been given.
Disciplinary Procedure	Disciplinary Procedures should be outlined in the bylaws so that every member has notice as to the Procedures.*	Member misconduct in a virtual meeting may be addressed by muting (3) the line of the offending participant (4) or, in certain circumstances, ejecting (1) the participant (4) from the meeting.
Putting the question	Chairperson calls for a vote on a motion after clarifying to the assembly upon what they are voting. **	Chairperson mutes all (2), unmutes (3) their line, and calls for a motion.

* Business Barcharts, Inc., 2011; ** Rulesonline.Com, 2020

*References: SparkNotes, 2006; Business Barcharts, Inc., 2011; Roberts Rules Of Order Sparkcharts (2006); Roberts Rules Of Order Quickstudy (2011), Business Barcharts, Inc.; Robert's Rules (2020). Pandemic-Related Official Interpretations, retrieved from <https://www.robertsrules.com/>; Robert's Rules Online: RulesOnline (2020). Retrieved from <http://www.rulesonline.com/>; Twelfth Edition of Robert's Rules of Order Newly Revised (in press, September 2020). Public Affairs Press. Retrieved from <https://www.robertsrules.com/default.html>; Webex.com (2020). Retrieved from <https://Webex.com/video-conferencing>; Moving from Live to Virtual Events (2020). Retrieved from <https://www.Webex.com/virtualevents.html>

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Voice vote	The usual method of taking a vote is by the voice.**	In a virtual setting it may be difficult to accurately assess the propensity of a voice vote, in which case the use of polling (5) may accomplish the same task.
Roll call vote	When a vote has been ordered to be taken by yeas and nays.**	Chairperson unmutes (3) each member after their name is called.
Show of hands vote	The chairperson calls for a vote by a raising of hands, first in the affirmative, and then in the negative.**	Chairperson creates a poll (5) with a timer (5). After the time has expired, the chairperson closes the poll (5), and shares poll results (5). The group or individual results (5) should be saved (5) by the chairperson.
Minutes	The record of the meeting's Procedures and what was accomplished at the meeting.*	Notetaking proceeds as it would in a physical meeting, excepting the notetaker can refer to the auto-generated call transcript (7, 8, 10) as reference.
Motions	A motion is a proposal that the assembly takes a certain action or expresses itself as holding certain views.**	Members may make a motion using the raise hand function (6), followed by recognition and unmuting (3) by the chairperson. After making the motion, the member lowers their hand using the raise hand function (6), and the chairperson mutes (3) the member.
Quorum	To hold a meeting and conduct business, there must be a quorum, or a certain number of members present, at the meeting.*	Chairpersons may validate quorum by counting the number of members represented in the participant list (4).

* Business Barcharts, Inc., 2011; ** Rulesonline.Com, 2020

Disclaimer: This guide does not offer opinions, recommendations, or interpretations of any Parliamentary Procedures. Continue to use Robert's Rules of Order as your authoritative reference. Holding formal meetings in a virtual environment and adoption of remote meeting processes may require changes in governing law, by-laws, or other regulations and should be considered before implementing.