

## Planning a Virtual Congregational Meeting

**INTRODUCTION:** Even if you do not have a provision in your bylaws for virtual congregational meetings you can still do one, subject to later ratification of action taken (*See, 2(b), below*). Whether in-person or virtual, the basic elements of a meeting still apply: Proper notice, opportunity for members to attend and participate, and compliance with the Polity applicable to the type of meeting. You should follow your bylaws to the fullest extent possible. With that in mind, the following is an outline for resources and concepts to help adapt your meeting into a virtual meeting. If you have any questions or concerns please contact the Stated Clerk for assistance: [statedclerk@ptcaweb.org](mailto:statedclerk@ptcaweb.org)

**1. Notice.** Be sure to follow the notice requirements in your bylaws regarding meetings and provide information sufficient that even a technologically challenged member can figure out how to participate. On that point, consider giving as much notice of the meeting as possible, to allow time for people to work with your technology person to download whatever app is being used in advance. Here is what Robert's Rules has to say on this point:

A group that holds such alternative meetings does not lose its character as a deliberative assembly... so long as the meetings provide, at a minimum, conditions of opportunity for simultaneous aural communication among all participating members equivalent to those of meetings held in one room or area.

*RONR (11<sup>th</sup> ed.), p. 97, l 22*

**2. Polity.** It may sound obvious, but please be sure to follow the requirements of the Book of Order as the foundation for whatever kind of meeting you are doing. The only thing that really changes with a virtual meeting is the manner of conducting it. If your bylaws provide for a virtual congregational meeting then you can skip the rest of this section. However, most church bylaws do not. Even so, virtual meetings are still allowed, so long as actions taken at a virtual meeting are later ratified. An Advisory Opinion of OGA Stated Clerk's Office from March 11, 2020, states on page 3 of 5:

**What if the congregation or session does not have a rule that provides for a meeting by electronic or virtual means? . . .**

Although the meeting is not constitutional, in the case of an emergency, the session [congregation] could meet by electronic means with reasonable notice of the electronic meeting, quorum, and at least one moderator, and take actions required to address the emergency or public health order. Reasonable notice may vary according to the emergency and the needs of the community. **These decisions will need to be ratified at a later properly called meeting, regular or special.**

## [OGA Advisory Opinion: Church in an Emergency/Pandemic](#)

Simply stated, do everything you can to make your virtual meeting substantively like an in person-meeting, be sure to give plenty of notice and opportunity to participate, and at your first in-person meeting be sure to have a vote to ratify any actions taken in your virtual meeting(s). That can be as simple as a motion: “To ratify all actions taken in the virtual meeting(s) held on \_\_\_\_\_ (Date(s)), during the Covid-19 emergency.” It is also suggested that you plan to amend your bylaws at that first in-person meeting to allow for virtual meetings (*See Advisory Opinion, p. 3 of 5*).

**3. Agenda.** It is suggested that you provide a means for members to view the agenda and any meeting-related documents, either on a website or as part of whatever technology you are using to conduct the meeting. When planning your agenda it is also suggested that you allow approximately double the time of an in-person meeting to accomplish your business. This is why it is suggested that only absolutely necessary business is transacted in virtual meetings during the current emergency.

**4. Technology.** It is suggested that you have an individual, or a team, to handle your technology needs. Possible platforms for group meetings are Microsoft Teams and Zoom, but there others. Your technology team should set-up and test the platform for the meeting, and be available during the meeting to help should anything unexpected happen.

**5. Extra Coordination.** It can be helpful to have a pre-meeting for the moderator and other people who will be “working” the meeting to run through the agenda and be clear on who is doing what, when, and how long it should take. Good clear coordination can make all the difference with regard to how well your virtual meeting goes, and how much time it takes.

**6. The Virtual Meeting.** In addition to the moderator and the clerk, you may wish to consider assigning the following tasks to an individual, or small group, for the sake of keeping things orderly and timely. Be sure to make clear at the start of your meeting that non-members may observe, but they may not vote or submit questions/comments:

a. Comment/question collectors. These people track written questions submitted by members. When using Zoom these questions can appear at the bottom of the screen, and it is just about impossible to read them while trying to pay attention to the meeting. Assigning people just to this task is important to ensure that all member questions are responded to, without causing undue distraction to the moderator or other speaker.

b. Dedicated technology person(s). As noted above, this is important to ensure you are able to efficiently run your meeting, not to mention complete the meeting.

c. Voting. How do you plan to take votes? Survey Monkey, Google Forms, or Zoom are a few options for handling ballots. One church used Zoom for folks who could participate via computer, and then published phone numbers on the agenda for assigned vote counters to take votes from people who could only call

in. Whichever you chose to do, be sure to test your technology and allow ample time for casting votes. It is recommended to allow a set time (10-15 min) for casting votes, so that the meeting can stand at recess during that time. That allows everyone to take a short break.

d. Time management. As noted several times above, you should plan on your virtual meeting taking about twice as long as the same agenda would take in-person. Everything is more cumbersome procedurally, and understanding that ahead of time will enable you to plan ahead, and to be patient on the day of your meeting.

**7. Adjournment.** When the time comes to finally end the meeting, a simple way to conclude without need for a lengthy vote is to simply ask for a motion to adjourn. Then, once the motion is on the floor, ask if anyone objects. Allow a few minutes for objections and, assuming no objections are posed, your virtual meeting is over!