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### You're On Mute - How the Shift from In-person to Virtual Board Meetings Impacts Board Governance and Communication in Nonprofit Associations

Theresa Hurley

University of San Francisco, [tbhurley@sbcglobal.net](mailto:tbhurley@sbcglobal.net)

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UNIVERSITY OF SAN FRANCISCO

CHANGE THE WORLD FROM HERE

**You're On Mute -  
How the shift from in-person to virtual board meetings impacts  
board governance and communication in nonprofit associations**

by

Theresa Hurley

thurley@usfca.edu

Capstone Research Report Submitted in Partial Fulfillment  
of the Requirements for the  
Master of Nonprofit Administration Degree  
in the School of Management  
directed by Dr. Marco Tavanti

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## **Abstract**

Because of the Covid19 pandemic meeting restrictions that started in March 2020, almost all nonprofit boards had to move to virtual board meetings. Through a literature review, expert interviews and a survey of nonprofit association Executive Directors, Chief Executive Officers and board members, this capstone explores the impact of the shift from in-person to virtual board meetings on board governance and board communication and dynamics for nonprofit associations. Some findings were positive - virtual meetings are more cost-effective, are better attended and more convenient and efficient than in-person meetings. Other findings were negative - multiple communication challenges inherent in the virtual meeting space such as decreased non-verbal communication, inability to see body language and distractions lead to decreased quality and depth of board discussion and less strategic work. Recommendations that associations can implement to allow them to effectively enhance their organization's governance and board communication in a virtual setting are provided. This research benefits the nonprofit community by raising awareness of the impact of virtual meetings on board governance and communication and providing practical recommendations for mitigating the challenges of virtual board meetings and a model for considering meeting modality when planning board meetings.

**Keywords:** governance, communication, virtual meetings, board of directors

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## Table of Contents

List of Tables	i
List of Figures	ii
Section 1: Introduction	1
Section 2: Literature Review	3
Section 3: Methods and Approaches	13
Section 4: Data Analysis	16
Section 5: Discussion and Implications	35
Section 6: Recommendations	40
Section 7: Conclusion	47
References	49
Appendix A: Capstone Expert Interview Questions	54
Appendix B: Capstone Survey	55
Appendix C: Capstone Survey Results	63
Author's Bio	78

## **List of Tables**

[Table 1. Organization Roles](#)

[Table 2. Board Meeting Frequency](#)

[Table 3: Type of Board Meeting Held Pre-Covid](#)

[Table 4: Voting Method Used by Number of BOD Members](#)

[Table 5: Level of Participation Success Virtual vs. In Person](#)

[Table 6: Structure of Board Meetings Changed in Virtual Environment](#)

[Table 7. Structure of Board Meetings Changed in Virtual Environment by Board Size](#)

[Table 8: Convenience of Virtual Board Meetings](#)

[Table 9: Attendance at Virtual Board Meetings Compared to In-Person](#)

[Table 10. Communication in Virtual vs. In-person Board Meetings](#)

[Table 11. How Do You Feel After Virtual and In-person Board Meetings](#)

## List of Figures

[Figure 1. Communications Pyramid](#)

[Figure 2. Survey Respondents Board Size](#)

[Figure 3: Pre-Covid Use of Virtual Meeting Platforms](#)

[Figure 4. Voting Method Used in Virtual Meetings](#)

[Figure 5. Board Meetings in a Virtual Environment](#)

[Figure 6. Board Meeting Engagement Virtual vs. In-person](#)

[Figure 7. Quality of Decision Making in Virtual Board Meetings Compared to In-person Board Meetings](#)

[Figure 8. Board Meeting Modality Considerations Model](#)

## **Section 1: Introduction**

Covid19 impacted nonprofits in many ways – limiting or completely shutting down services, staff working remotely, if at all, revenue severely crippled, all while the necessity for services and support rose to high levels because of increased client needs. Those served by nonprofits were often the worst hit during the pandemic as the usual social and community supports were now gone.

In the nonprofit association world, staff struggled with supporting their members in uncharted territory, as they not only modified how to do their own work while facing productivity and communication challenges from working from home, but also needed to provide education and support to their members. As time went on and organizations were not bringing in the same money, staff hours and pay were cut and even entire positions were eliminated, further adding to the stress and workloads of those remaining. Staff workload also increased with the extra work involved in implementing online education and meetings and educating their members on how to access and use these technologies.

These rapid and unprecedented changes caused nonprofit association boards of directors to swing into action because the decisions they had made at the beginning of 2020 about budgets, programs and organizational direction went out the window as the pandemic shut down dragged on. Boards needed to make decisions on the short-term future direction of their organizations under immense time pressure with very little information to guide them. All the while board members were struggling with changes in their own professions and individual businesses, not to mention upheavals in their home environments.

The pandemic shelter in place orders also necessitated a shift from in person to virtual meetings for boards of directors for local, regional, state and national associations. Nonprofit board meetings had almost always been held in person, even statewide and national nonprofits would fly people in from all over to attend board meetings. Even though individual board members would need to occasionally participate telephonically or a board might hold an emergency meeting via phone, almost no nonprofits held meetings where everyone participated virtually.

Boards that had once made decisions together around a table over hours or days now had to see each other on screen – if they had the bandwidth to do so, because now their partners,



children, roommates or whoever else they lived with also required internet access and many did not even have video capabilities at the start of the pandemic. Board members had to grapple with learning new technology, dealing with tech problems and figuring out how to work together and communicate in a new medium. Meeting virtually was necessary to ensure boards could continue to govern their associations and keep individual board members safe.

Almost as soon as my organization's board moved to virtual board meetings, I saw changes in the way the board interacted and the effect it had on board governance and communication. As the pandemic went on for months and nonprofit boards continued to meet virtually, I wondered if other nonprofit association boards had also experienced an impact on governance and board communication and dynamics because of this shift in meeting modality. This led me to my research questions:

1. What changes and impact on nonprofit association board governance have occurred with the shift from in-person to virtual board meetings?
2. What changes and impact on nonprofit association board communication & dynamics have occurred with the shift from in-person to virtual board meetings?

This report first lays out a relatively wide-ranging literature review in the areas of virtual meetings and group dynamics, communication and board governance. Holding nonprofit board meetings in a virtual environment, especially for local nonprofits, was not at all common before the Covid19 shutdown therefore there have been almost no studies done on this specific topic in the past. The next section describes the research methods I used including expert interviews and a survey of association Executive Directors (ED), Chief Executive Officers (CEO) and board members about their virtual board meeting experiences. After that I describe and analyze the data I received from the expert interviews and the survey. Finally, I discuss the implications of my findings and what may lay ahead in the future for nonprofit association boards. In addition, I provide recommendations for best practices for virtual board meetings and include a board meeting modality consideration model. To conclude, I go over the benefits and limits of my research and provide recommendations of additional areas of study in this very new research area.

## **Section 2: Literature Review**

Meeting virtually was necessary to ensure boards could continue to govern their associations and keep individual board members safe. Even though boards were able to continue meeting, I wondered if there was an impact on governance and board communication and dynamics because of this change in meeting modality.

This literature review first examines nonprofit governance and how virtual board meetings affect a board's ability to carry out its fundamental duties, especially the duties of care, obedience and confidentiality. It then segues into exploring board dynamics and how virtual group dynamics relate to board dynamics. A big part of effective governance and positive group dynamics is communication effectiveness and in the next part of the literature review I look at the impact on communications of different meeting modalities. I explore trust in a virtual environment and the vital role of the board chairperson in virtual meetings. I conclude by reviewing some of the advantages of virtual board meetings, having already spent considerable time on the challenges in the previous sections of the literature review.

### **Shift to virtual meetings**

When the pandemic first started over a year ago, there was no sense of how long board meetings would need to be held virtually and it became obvious early on that holding meetings in this new modality could not be done in the same way as in person. For a board of 30 that was used to a raised-hand or verbal vote, it quickly became apparent that was not something that could be done easily when board members were spread over two or more Zoom screens, some were off camera and only one person's voice could be heard at a time. Discussions were interrupted by family members, pets or construction noise. Board members had to fit in their paid work at odd hours and had less time to devote to the board, as children required more assistance because they were all being homeschooled, and spouses were also working from home. At the same time, ED/CEO's and board members were aware of the increased need for the board to guide the organization during this turbulent time. So, the shift to virtual board meetings began. Grundy (2004) aptly states that working virtual means working together apart.

### **Effective governance practices**

Forbes & Millikin (1999, p. 492) define boards of directors as "large, elite and episodic decision-making groups that face complex tasks pertaining to strategic-issue processing." Boards are responsible for safeguarding the governance and viability of the organization (Deloitte, 2020)

and carry out their governance duties during board meetings. Boards operate on different dimensions – as a group of individuals, a team and as a legal body. Governance itself is based on group action (Gazley & Nicholson, 2018). “Sound governance requires directors to perform their role of being a thoughtful and vocal presence at the Board table” (Bruni-Bossio et al., 2016 p. 12).

“Good Governance practices describe boards activities and expectations that are both externally imposed and self-imposed to ensure a boards duties of care, loyalty and obedience are met” (Gazley & Nicholson, 2018 p. 262). These governance principles include collegiality, independent-mindedness, confidentiality, collectiveness, empowerment and oversight of CEO, communication with stakeholders and attentiveness/responsiveness to stakeholders (Bruni-Bossio et al., 2016).

There are several board governance models, among them the contingencies model where the board governance framework and role performance relationships evolve over time based on various factors that change. The relationship model posits that effective governance results from the continual process of interactions between individuals such as the Executive Director and board members or board members to each other. Both governance models stress the importance of improving role-performance relationships for good board governance as well as good organization performance (Bruni-Bossio et al., 2016).

Good board governance requires directors to make effective, sensible decisions and overcome both individual and group decision-making information barriers. Steckler & Clark (2018) found that boards that select for, cultivate and enact authenticity are more likely to positively influence effective governance and ethical business conduct. In addition, perceptions of authenticity can lead to enhanced group effectiveness, make individuals more predictable to others, increase positive work attitudes and enhance effectiveness (Steckler & Clark, 2018). According to Trower & Eckel (2020) “The pandemic is asking everyone to be flexible, including boards.” This includes the capacity to be reflective and make time for board members to talk about what they are doing and how well they are governing.

### **Virtual board meetings affect a board’s ability to carry out its fundamental duties**

Boards of directors have certain fundamental duties in order to effectively govern their organizations; the duty of care, duty of obedience and duty of loyalty. Boards also have fiduciary duties to ensure that the organization's resources are utilized in a reasonable, appropriate and

legally accountable manner (Renz, 2016). Holding virtual board meetings may affect the board's ability to carry out these duties. In addition, Executive Directors have an important role in support of governance (Mason & Kim, 2020).

According to Renz (2016) the duty of care requires that the board display judgment that any reasonable person would show under similar circumstances, which includes being attentive, diligent and thoughtful and actively participating in board meetings. Distractions during virtual board meetings can mean that attendees are not able to fully participate or understand what is happening in a meeting (Dyak, 2021). Distractions can be in the local environment such as other people in the room or external noises or they can be intentional such as a board member multi-tasking by reviewing emails or sending texts. These distractions can lead to reduced performance and missed discussion points (Oeppen et al., 2019). A Marsh McLennan Companies survey of 2000 board directors conducted in mid-late 2020 found that virtual board meetings work but aren't as effective as in person meetings. The top three reasons cited were loss of nonverbal communication (68%), tech issues (39%) and lack of participation of each director (30%). Technical difficulties, such as a board member having audio problems or not enough bandwidth therefore not being able to fully participate in discussion can be very challenging. The resultant lack of knowledge and/or incomplete information can lead to faulty decision making. In addition, concentrating in remote meetings can be more difficult than when face-to-face especially in a long meeting (over 2 hours) and it is harder to look for and recognize signs of fatigue in a virtual environment (Barker, 2020, Oeppen et al., 2020).

Because discussion can be challenging in a virtual environment it could create problems with board members' ability to go along with decisions made collectively by the board. Understanding the basic governance principle that the majority decision must be respected and supported, even by those who aren't in agreement with that decision, is vital to boards being able to work together effectively. In a nonprofit board where there is one group decision that everyone must abide by, all bear responsibility toward getting the job done. Aluaimi et al. (2014) finds that individuals in larger virtual teams feel less responsible for achieving goals, put in less effort, and blame others for their social loafing. The potential lack of in-depth discussion may hamper this ability to accept group decisions and lead to groupthink in order to minimize conflict and maintain harmony (Acai et al., 2018). Communication barriers in virtual meetings can also contribute to a lack of discussion, which I will go into later in this paper.

Finally, confidentiality is very important when it comes to board discussions about sensitive topics such as finances, personnel, litigation and more. In an in-person meeting it is relatively easy to ensure privacy, but when meeting virtually or telephonically there is no way to guarantee other people are not in the same room and can overhear or see discussions. Participants could be in their office, home, car, coffee shop or any public or private space. In addition, computers can be hacked, and meetings can be recorded without others' knowledge.

### **Board dynamics are affected by a virtual meeting environment**

Board group dynamics play an important role in board governance and interactions in the boardroom may affect the effectiveness of the board in nonprofit organizations (Van Puyvelde et al., 2018). Boards are social constructs where board chairs and board members must support each other during times of challenge (Deloitte, 2020). Schoenberg et al. (2016) finds that cohesion and boardroom climate both have a positive relationship with board performance and therefore intragroup dynamics should be a central factor in board governance models. Mechanics (how the meeting is run) and dynamics (how a group works together) must be considered when running an effective meeting (Barker, 2020) especially since both mechanics and dynamics are changed in a virtual meeting.

A study by Bruni-Bossio et al. (2016) finds that when directors have problems with decision-making and communication processes it leads to difficulties in being collegial and independent-minded, making it difficult to work together and creating unproductive and unsatisfactory meetings where factions can form. Boards with deficiencies in collegiality face problems with quality of discussions and decisions. Hinds & Bailey (2003) found that virtual environments create negative effects in relationships such as reduced cohesion and consensus, lower trust and less of a sense of belonging on a team.

A cohesive board has a sense of togetherness in achieving a long-term purpose. Positive boardroom climate includes a level of constructive skepticism in a psychologically safe environment (Schoenberg et al., 2016). Even turn-taking and all board members participating leads to increased effectiveness or perceived effectiveness of the board (Pugliese et al., 2015). Domination in turn-taking, forming of groups or coalitions and disengagement of directors are negative dynamics between board members and can be easy to overlook in a virtual environment (Pugliese et al., 2015). In addition, zoom fatigue and the need to make urgent decisions in a remote environment where there is the potential for isolation (Athitakis, 2021, Marsh

McClennan, 2021) can lead to members wanting shorter meetings and decreased discussion. Members may be silenced or ignored in virtual meetings by other board members (Schwartz-Ziv, 2020).

Board intragroup dynamics such as sense of teamwork, the process of discussing and debating ideas, power of each individual and how conflict is managed should be considered alongside board factors such as structure and composition as a fundamental factor underpinning effectiveness (Schoenberg et al., 2016). Cohesive team dynamics improve productivity (Guerra, 2017). Group intimacy and cohesion decrease as people get further apart (Kanter, 2017). Group activities are dynamic, group members decide their actions by reacting to actions of other members (Nicolopoulou et al., 2006). Board performance is a complex phenomenon, in effective boards members 1) coach and teach each other 2) develop each other's strengths 3) listen attentively to each other 4) take lead at board meetings 5) contribute unique perspectives. (Pugliese et al., 2015, Nicolopoulou et al., 2006).

Levels of board cohesiveness and conflict between directors can either enable or constrain the engagement of boards in strategic decision making (Zhu et al., 2016). Virtual teams may experience difficulties with planning and coordination which may lead to less clarity around roles, expectations and thought processes of other members (Acai et al., 2018). Virtual cliques can form in meetings, especially during heated discussions when participants may have off-line discussions and support each other in chat (Bisbee & Wisniewski, 2019).

According to Egea (2006), groups develop trust through actions and communicating individual roles and shared goals, a socio-emotional process that builds team relationships. Inclusion is important for building team motivation and cohesion and teamwork is enhanced by shared understanding of required tasks (Egea, 2006). When groups are not meeting in person interactions may become transactional instead of personal.

Groupthink is a major stumbling block and, according to Barker (2020) is more likely to happen in a virtual environment and when groups are under stress, are insulated from external perspectives, don't have accurate information because of uncertainty and are dealing with urgent issues. Groups will feel the need to make quick decisions with less discussion and there is decreased tolerance with disagreement so that they can move ahead (Barker, 2020). Acai et al. (2018) finds that groupthink occurs in virtual teams because members want to minimize conflict and maintain harmony.

### **Communication challenges in virtual meetings**

Communication is a critical component in effective board governance. Communication and collaboration are key characteristics for successful teams working in a virtual environment (Egea, 2006). Communication effectiveness is rated significantly higher in groups that meet in person compared to those who meet remotely (Zhou et al., 2019). Because of a lack of nonverbal communication, body language and other clues, participants have to give careful and precise verbal communication in a virtual environment (Oeppen et al., 2020). Continual communication is critical to a team's success and communication in a virtual environment requires a greater level of explicitness than in a face-to-face environment (Egea, 2006).

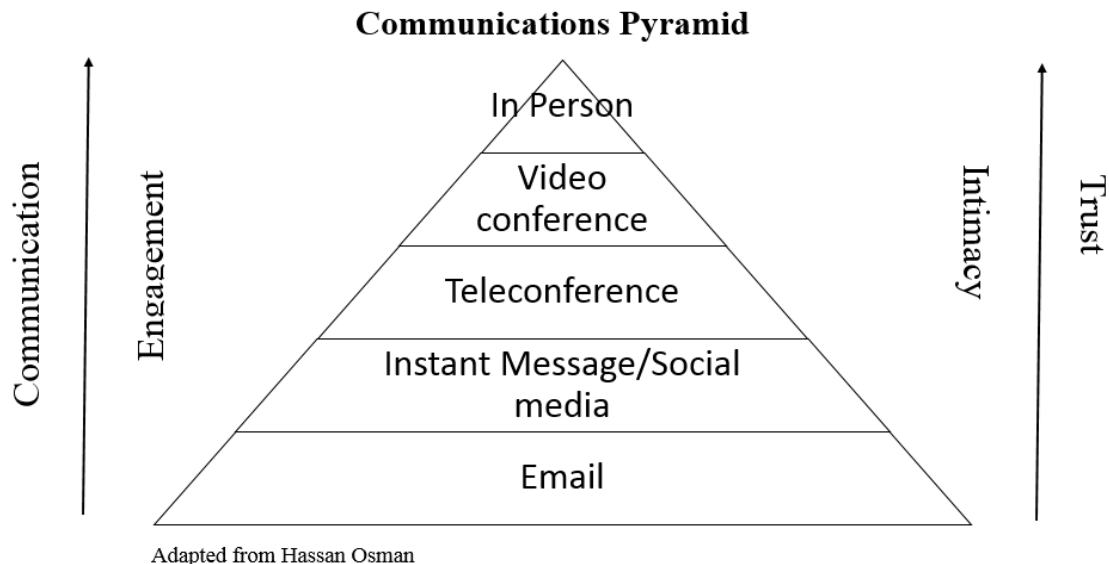
Because of reduced social cues and more limited communication options, effective communication in a virtual environment may be more difficult than in face-to-face. The usual social processes that enable communication and decision making are lost (Guo et al., 2009). Interacting online is different from in person because people working together do not share the same physical location. Being in the same space facilitates greater involvement and nurtures familiarity and affinity – a sense of connection, similarity, solidarity, openness and understanding (Guo et al., 2009).

Not respecting communication protocols can lead to a loss of confidence, trust and respect among board members and other stakeholders (Bruni-Bossio et al., 2016). Pugliese et al. (2015) finds a clear association between recurrent silence of a proportion of the board, lower participant perceptions of performance and a difference in board climate noticeable to an external observer. According to Van Oortmerssen et al. (2014), conversation interaction is made up of 3 overlapping areas – content (patterns in what is being said), atmosphere (the climate within which conversations take place) and process (patterns in turn-taking). All three can be affected in a virtual environment, in particular the process of conversation interaction.

**Different meeting modalities impact group communication effectiveness.** I created a Communications Pyramid (Fig 1), adapted from Hassan Osman's communication pyramid, that looks at types of group interactions and the impact on communication, engagement, trust and intimacy. It assumes more intimated communications lead to a higher level of trust, increased engagement and communication. In their survey of the literature on virtual versus face-to-face collaboration, Wainfan & Davis (2004) find that any mediated communication, be it virtual, telephonic or computer-mediated communication (CMC), such as email and text messaging,

limits nonverbal and paraverbal (how words are communicated such as tone of voice and word choice) communication and “reduces the ‘richness’ of the information communicated” (Wainfan & Davis, 2004, p19). Their survey also finds that discussion in virtual, telephonic and CMC communication formats is more likely to be task-oriented and less social than in-person.

**Figure 1: Communications Pyramid**



Created by author.

In the Communications Pyramid the least intimate and engaged communications with the lowest impact and trust levels are instant message & email communication where people interact asynchronously and only one message or email can be read at a time. It can be challenging to follow the conversation thread depending on the variety of topics and responses, can be more easily misinterpreted (Wainfan & Davis, 2004) and it is more ponderous for people to react to others than in-person communication. Wainfan & Davis (2004) find that CMC reduces individual responsibility, inhibition and effort which can lead to increased polarization, lower group cohesion and a shift toward risky or extreme options. In addition, they find that CMC groups took longer to make decisions and consensus was less likely than in other types of communication.

Teleconferencing is higher in the communications pyramid because participants are able to respond to each other synchronously, but because they can't see each other they are left to



determine each other's reactions by their tone and words which can be misinterpreted (Wainfan & Davis, 2004). Some people will be drowned out or not feel comfortable speaking up, others may dominate unless there is an adequate facilitator so it is very easy for some to not participate at all. Studies have found that teleconferencing leads to less compromise and more breakdowns in negotiation than in-person meetings (Wainfan & Davis, 2004). As they so aptly put it "It's harder to lose face when faces aren't visible" (Wainfan & Davis, 2004, p38).

According to Bisbee and Wisniewski (2019 p. 73) "If conference calls are the granddaddy, video conferencing is the smart, but rowdy teenager - confident in its own abilities, but in such a way it makes everyone else feel awkward and slightly unconfident." In video conferencing participants can hear and see each other, which is definitely a step up from audio-only because they can start to discern some visual cues, mainly facial expressions. Problems arise if some people don't have video capabilities or choose to have their video off or when there are more than 10 people in a meeting and the size of the video screen can make it challenging to see faces. This leads to reduced social cues in meetings (Hinds & Bailey, 2003) and reduced cohesion (Wainfan & Davis, 2004). In virtual meetings participants can't see whole body language, and there are barriers as current video technology only allows one person to speak at a time. Technology issues can cause problems and people can be distracted by other unrelated things in the background or work/personal tasks on their computer. Another way virtual meetings differ from in-person is that many people feel awkward when being on camera. People don't normally look at themselves when talking to other people (Bisbee & Wisniewski, 2019). According to Bailenson (2021, p.3) "Users are constantly receiving non-verbal cues that would have a specific meaning in a face-to-face context but have different meanings on Zoom." Wainfan & Davis (2004) find that the higher cognitive workload in virtual communication can cause group members to shift to simpler problem-solving strategies or be more biased.

Finally, the top of the communication pyramid is in-person meetings where participants are all together in a room without other distractions, can see or hear each other in real time, see body language, have the ability to have side conversations and understand more subtle facial expressions and body language even in bigger groups. People meeting in person also have the ability to converse during meeting breaks, creating more opportunities to develop relationships and trust.

### **Virtual meetings impact team trust**

In order to make positive and effective decisions for their organizations, board members must trust each other. Trust resides in personal relationships and past or future membership in common social networks that define shared norms of obligation and responsibility (Benetytė & Jatuliavičienė, 2013, Bradach & Eccles 1989). Virtual teams are isolated so there is less opportunity to come together and share experiences. It can be challenging to build trust in a virtual environment because of less access to social cues – which can lead to less cohesion and relationship conflict (Acai et al., 2018).

Team trust is even more necessary for cooperation in virtual teams since face-to-face methods of communication and control aren't feasible (Penarroja et al., 2015). Team trust facilitates team members to share ideas, opinions and reflections of problems more openly and plays a significant role on the effect of team feedback on information processing and learning in virtual teams (Penarroja et al., 2015). The negative effects of a virtual environment can be mitigated by using a trusting environment (Benetytė & Jatuliavičienė, 2013).

Increase in trust leads to increases in openness, responsiveness, and speed in a board's conversations. Trust grows with increased interaction and leads to more interactions, so it becomes a self-reinforcing cycle (Van Oortmerssen et al., 2014). Not being able to have in-person casual interactions before, during or after meetings can have a negative effect on trust and morale (Oeppen et al., 2020). Early in a virtual group's life social communication (not task-related) and communication of enthusiasm is important for trust building. Later in a group's development responsiveness and predictable communications are significant for maintaining trust (Van Oortmerssen et al., 2014).

Nonprofit boards have to make decisions and try to come to consensus often under pressure and without a lot of information. Fjermestad (2005) finds that groups making decisions using a constructive consensus approach have higher levels of decision acceptance, more willingness to work together and are able to come to decisions more quickly than structured conflict groups in a virtual environment. Often virtual teams are less effective in making group decisions, need more time to reach decisions and team members are less satisfied with the decisions made (Penarroja et al., 2015).

### **Chairperson's role in virtual meetings**

The board chairperson has the most important role in ensuring that board meetings are efficient and effective and that role is even more vital in a virtual environment. Leadership deficits can create hidden tensions that prevent groups from performing (Nicolopoulou et al., 2006). Meeting remotely places more weight on the board chair to make sure all board members participate and are heard. The chair must understand the mood and dynamics of other board members and be quick to respond. Strong board chairs need skills in consensus building and conflict resolution (Boardsource, 2017) as well as in facilitating balanced discussion, inviting opinions from quieter people and being aware of who is dominating (Oeppen et al. 2020).

The board chair needs to be a team leader with good interpersonal skills, who fosters an environment that builds trust, and encourages members to frame and discuss strategic questions (Van Puyvelde et al., 2018). According to Schwartz-Ziv (2020), E-leadership (leadership in a virtual environment) is socially dynamic, 2-way relationships between leaders and followers in a virtual workforce. Relationships and trust are key constructs and E-leadership strategies include emotional, social, authentic & technical skills (Schwartz-Ziv, 2020). Lack of knowledge of group dynamics results in ineffective facilitation that can harm the performance of a group (Nicolopoulou et al., 2006).

### **Advantages of virtual board meetings**

So far, I've mainly discussed the disadvantages and pitfalls of virtual board meetings, but there are also several advantages. Convenience and reduced travel time and cost are cited in many studies as some of the advantages of virtual meetings (Brennan et al., 2020, Ferrazzi & Zapp, 2020, Oeppen et al., 2020, Schwartz-Ziv, 2020). These factors have led to increased attendance at board meetings. It is easier for those who can't attend traditional meetings and trainings, such as parents with young children or other family commitments, to attend a virtual meeting (Bisbee & Wisniewski, 2019, Oranburg & Kahn, 2021). Finally, in virtual meetings there is more flexibility in scheduling and an opportunity for guests, such as experts, local politicians or up-and-coming board members, to attend meetings (Brennan et al., 2020, Ferrazzi & Zapp, 2020, Oeppen et al., 2019, Oeppen et al., 2020).

### **Section 3: Methods and Approaches**

The applied research in this capstone used a mixed method approach to capture qualitative and quantitative data. As a nonprofit professional with 20+ years of experience, in particular an Executive Director working with a board of directors for the last 6 ½ years, and a Certified Association Executive (CAE), I acknowledge that I have a perspective and experiences that may have influenced or shaped the questions used in the qualitative and quantitative methods of my research. The reason I became interested in this topic was because of my experience working with a board that transitioned from in-person to virtual board meetings due to Covid19 restrictions. I worked to eliminate biases but acknowledge the human element of this research. My research was conducted to answer the following questions:

1. What changes and impact on nonprofit association board governance have occurred with the shift from in-person to virtual board meetings?
2. What changes and impact on nonprofit association board communication & dynamics have occurred with the shift from in-person to virtual board meetings?

#### **Qualitative**

I conducted 11 semi-structured expert interviews. Interviewees were chosen to represent people with different experience working with nonprofit boards of directors. Some are current ED/CEO's of different types of nonprofit associations, some are nonprofit governance consultants with extensive prior experience as ED or CEO's of nonprofit organizations, some work for organizations that provide management services to nonprofit associations and one interviewee is a nonprofit law attorney. Some of the experts are people I know through my professional work and some are ones I learned about through my classes at USF or through other nonprofit contacts. I conducted Zoom video interviews with 10 of the experts and an email interview with 1 expert. All Zoom interviews were recorded, and I took extensive notes to reflect interviewees quotes and ideas. Interviews were analyzed by looking at keywords, ideas and themes. I asked questions to focus and direct conversations on my topic of virtual meetings and nonprofit board governance and board dynamics and communication. See Appendix A for a full list of expert interview questions. Examples of the questions I asked are:

- Thinking about large and small changes in your board meetings, what changes have you noticed while working with the board in the virtual environment?
  - What do you think has caused those changes?

- How have governance practices been impacted in this shift in the meeting environment?
  - What do these different practices mean for the future of nonprofit association boards/your organization?
- How has board communication been impacted by the shift to virtual board meetings?

### **Quantitative**

I created a 32-question survey using Qualtrics survey software. The survey includes scale, categorical, demographic and text questions completed by participants and was open for completion for a 4-week period. The data was analyzed in Qualtrics and Jamovi. The 32 questions included 6 demographic, 6 categorical with nominal responses, 14 categorical with 5-point Likert scale, 4 visual analogue and 2 open-ended questions. The survey was designed for nonprofit association ED/CEO's and board members and the results were anonymous. I did not limit the survey to one per nonprofit association because I wanted to hear from both ED/CEO's and board members.

The survey was distributed via a convenience sample and snowball method. I relied on members of my professional network to complete and share the survey. The survey was sent out between March 24 – April 14, 2021 via 3 ED/CEO list-servs: Executives of California Lawyers Associations (ECLA), National Association of Bar Executives (NABE) and California Society of Association Executives (CalSAE). I asked the ED/CEO's on those listservs to fill out the survey and requested that they forward the survey request to their board members and any board or ED/CEO contacts they had at other associations. I also sent the survey request out via an online newsletter to the National Council of Bar Presidents (NCBP) in mid-April. The survey was open for responses from March 24, 2021 until April 23, 2021.

Because of my professional distribution networks, the survey respondents were from both general nonprofit associations (mainly located in California) as well as nonprofit bar associations within the US and Canada. The survey itself is included in Appendix B and survey results are in Appendix C. Examples of survey questions I asked are:

- Please state your role
- How many people are on your Board of Directors?
- Describe your level of success in participating in virtual board meetings (scale = 0-10 with 0 being no success and 10 being very high success)

- o Same question and scale for in person board meetings
- How effective have you found communication to be in virtual board meetings?
- How does the quality of decision making in virtual board meetings compare to in person board meetings?
- I am able to stay engaged (scale = always, mostly, sometimes, rarely, never) in virtual board meetings.
- o Same question and scale for in person board meetings.

The survey was designed as an assessment tool rather than a statistically significant analysis, given that the response was lower than the sample size needed to be representative of nonprofit associations and as indicated earlier, was weighted heavily toward bar associations. Because of this the data analysis is limited to descriptive and inferential statistics for assessment purposes only.

## Section 4: Data Analysis

### Expert Interview Summary

I conducted 11 expert interviews to learn perspectives from a wide range of nonprofit association professionals, both consultants who work with and educate nonprofit boards in the areas of board management and governance as well as current and former nonprofit association ED's and CEO's. Many of the experts I interviewed also currently serve as nonprofit board members themselves. The same list of questions was used with slight variations depending on the interviewee's role, though since these were semi-structured interviews I did not necessarily ask every interviewee every question, but instead made sure I was able to discuss with them the main themes of my research. I asked my experts about their experience with the shift from in-person to virtual board meetings and what changes if any they had seen in board governance, dynamics and communication both in their paid roles and on the boards they serve on themselves. We also discussed what they thought would happen in the future once the pandemic's meeting restrictions were no longer in place. I learned about the benefits, challenges and concerns about virtual board meetings as well as best practices in governance.

Jim Anderson has been the President and CEO of California Society of Association Executives (CalSAE) for over 17 years, prior to that he was an Executive VP at United Way, California Capital. In his current role he manages the CalSAE Board as well as the day to day operations of the organization that supports leaders in the California association industry.

Mary Byers is a nonprofit association consultant and Certified Association Executive who works with a wide variety of associations to help volunteer leaders and staff create a viable and sustainable future. She has written two books about effective association management, has a podcast 'Successful Associations Today' and speaks nationwide about association relevance, change and relationship management.

Marla Cornelius has 20+ years' experience in the nonprofit sector as an expert trainer, facilitator, content coach and consultant specializing in nonprofit governance, board development, adaptive and strengths-based leadership. She was a member of CompassPoint's staff for 17 years and currently serves on the board of Cattown. Marla is a graduate of USF's MNA program.

Keith Darby is the CEO of the San Mateo County Medical Association. Before that he served as Executive Director for American College of Phlebology. Keith has a variety of

governance-related certifications including as a CAE and Institute of Organizational Management (IOM) and has taught the leadership and governance modules of the CAE exam to CalSAE study group participants.

Teresa Excinia has over a decade of business management experience, and currently works for California Advocates Management Services where she serves as the Executive Director for three associations.

Bob Harris is a governance guru, educating nonprofit leaders around the country on best practices in board governance. He is on the faculty for the US Chamber of Commerce and has authored books on association management. He has been dubbed the ‘Martha Stewart of association management’ for providing tips and templates for making management easier.

Jennifer Lewin is Deputy Director of the American Bar Association (ABA) Division for Bar Services, providing strategic planning and board development training for local, state and national bar associations of all sizes for over 20 years.

Karyn Linn is a specialist in association governance, having worked for over 20 years at the ABA Division for Bar Services before moving to her current position at Chicago Association Management. She currently works with Rotary clubs and associations advising them on board governance issues.

Jan Masaoka has been CEO of CalNonprofits for over 9 years. Before that she was the founder and Editor-in-Chief of Blue Avocado magazine and Executive Director of CompassPoint. She is currently a Board member with MapLight, a nonpartisan research organization that reveals money’s influence on politics.

Gene Takagi is a nonprofit law attorney who advises nonprofits of all sizes about legal issues. He currently serves on the board of Boardsource, a nonprofit that provides education and support for nonprofit board members and CEO’s and is also on the board of Nonprofit Quarterly. He is a graduate of USF’s MNA program and has also taught in the MNA program.

Julia Wilson is an executive, leadership and team coach as well as the Executive Director of the John Paul Stevens Fellowship Foundation. She served as CEO of OneJustice, a legal services organization and as Executive Director of the Legal Aid Association of California. She currently serves on the boards of Equal Justice Works and BoardSource.

The sections below recount the themes related to my research questions as well as common topics that emerged during the interviews.



### **Governance benefits of virtual board meetings**

The majority of the experts I interviewed listed increased attendance as a benefit of virtual board meetings, some noting that it is easier for board members to attend virtual meetings from anywhere. This has also led to an increase in committee meeting attendance and Karyn Linn has seen increased committee member attendance and engagement and easier collaboration in virtual meetings. A related benefit cited by many was the time and money savings for organizations and individual board members from not having to travel to meetings, as well as a related decrease in travel-related stress around meetings. In the past when board members were unable to attend a meeting in person, they would participate by phone and many experts commented that virtual meeting participation was more meaningful than telephonic participation where it was difficult to know who was talking and/or actively participating.

Another benefit that was frequently mentioned was the ability to more easily include experts and guest speakers such as local politicians, shareholders, or members in virtual meetings. This increased inclusivity often led to more diverse viewpoints being heard and considered and made leadership more accessible. Some interviewees also said that they were hearing from more board members in general and often different voices from those heard at in-person meetings, women of color and younger board members were mentioned in particular as those whose participation had increased in virtual meetings.

Some of the specific technology tools available in a virtual environment were stated by many experts as beneficial to governance. Being able to easily move into breakout rooms to discuss questions and explore ideas has led to higher engagement and deeper discussions, especially from quieter board members. Julia Wilson used the term ‘deep democracy’ to explain this benefit and views breakout rooms as a strategic, generative space. In addition, being able to use tools such as screenshare and whiteboards as well as chat for a discussion space or sharing links to resources were cited as ways to increase a board's creativity and innovation.

Finally, the disruption of Covid forced boards to educate themselves about their own policies and procedures, as well as legal requirements for running meetings. This has led many boards to look at new ways of operating during board meetings such as ways to increase meeting efficiency, as well as considering what needs to be changed in the wider organizational environment. Keith Darby termed it a ‘good reset’ allowing boards to become nimbler and engage in a different way.

### **Governance challenges of virtual board meetings**

Despite there being many benefits of virtual meetings, the experts I interviewed also found many challenges in governing an organization remotely. Almost all cited the lack of non-verbal communication and inability to see body language as barriers to trustful, quality discussions because board members didn't have any physical cues from others. Marla Cornelius referenced the Duty of Care, one of the primary responsibilities of board members, and wondered how the board chair, and other board members, would know if people who were off camera were paying attention. Technology limitations on Zoom, such as only one person being able to talk at a time can also limit discussions. According to Julia Wilson "When people can't talk at the same time, you don't get the juiciness." (J. Wilson, Expert Interview 6, March 22, 2021).

Distractions were also brought up by many as a challenge in governance. Board members being distracted by what was going on in their environment, or answering emails, texts, etc. during meetings were cited as problems. Concerns about board members more easily getting bored and checking out, especially if a meeting drags on were raised. Many experts felt it was very important that board members be in a private place during meetings so they could concentrate on the meeting as well as ensure some level of confidentiality. Zoom fatigue came up as a concern, particularly since many association boards meet in the evening and are made up of professionals who are now spending large parts of their days in front of a screen at their paid jobs. Many stated that zoom fatigue led to shorter board meetings, often at the expense of more in-depth discussion.

Related to that is the concern that several experts expressed about 'chilled deliberations' and decreased questions in a virtual environment. While it can be easy to be passionate in person, many experts felt board members seemed to want to dampen discussion when online, and it can be easier for board members to stay silent if they don't agree with the majority opinion instead of engaging in robust discussion. A board meeting is supposed to be a place of collective, collaborative discussion about a nonprofit's future and this loss of dialogue is a major concern. Some of my interviewees stated that board members were quieter in virtual meetings and it was harder to get some people to talk. Another concern raised was how to get other stakeholders such

as committee chairs, members and clients involved in board meetings and be transparent with these groups while still maintaining appropriate confidentiality during virtual meetings.

Board member overload from having to juggle their own professional and personal stresses meant that some boards did not have enough personal bandwidth for more than operational decisions. This led to boards only being able to look at immediate concerns, having a myopic focus, instead of looking more strategically at the organization's needs. Many of the experts I spoke to said that it was already common pre-pandemic for board members to struggle with understanding how to work strategically as opposed to operationally. Most board members were much more comfortable in the management/operational sphere and the added stress and uncertainty of the pandemic made them even more unsure of how to lead their organizations strategically instead of focusing on the day-to-day operational aspects. Executive Directors ended up picking up the slack from their boards and taking on strategy work, while also handling staff and organizational needs. According to Jennifer Lewin, an upside to this for Executive Directors may be a greater role in strategy development in the future, accelerating the recent trend in nonprofits of shifting from an Executive Director role and title to one of Chief Executive Officer.

Problems with tech failures were brought up such as bad sound and low bandwidth which meant board members were not able to be present in the same way as they were in person. Another tech concern raised was that as the pandemic drags on and everyone adjusts to the virtual world there seems to be an increased assumption that board members are all middle class and have access to a good computer and adequate broadband. This is not the case for everyone and could lead to issues with equity in board participation.

Finally, it quickly became apparent to many that when the board chair was not able to lead in a virtual environment meetings became more challenging and less productive. Board chairs who were not comfortable with virtual technology, lacked emotional intelligence (i.e. could not read group dynamics) or were not confident in their leadership skills often compounded many of the issues described above. Board chairs leading virtually are required to be more proactive and deliberate in their work by making sure that different points of view are raised and discussed and that all board members have an opportunity to participate.

### **Board communication and dynamics in virtual board meetings**

As Marla Cornelius put it well, “Governance is about relationships, not just technical and to-do’s” (M. Cornelius, Expert Interview 5, March 22, 2021). My experts felt that there were many challenges and a few benefits to board communication in virtual board meetings. Many people join association boards for networking and other social reasons. A lack of engagement or being ‘in community’, not knowing if people are listening or, if they are off camera, reacting or even present during meetings were cited as problems in a virtual meeting.

Trust came up as an issue several times, Jan Masaoka noted that the virtual environment can be dehumanizing, and others have seen a lack of civility. Mary Byers said “I’m hearing about more bad behavior over the last year than I have in the last 20 years” (M. Byers, Expert Interview 3, March 18, 2021). Trust can’t be built if board members can’t be candid and have respectful disagreements. The lack of social time and team building made it harder to create trust and ensure everyone’s participation in a remote meeting. Getting to know others, learning who people are and integrating new board members is a challenge, since the “white space of meetings is what you don’t get” in a virtual environment according to Masaoka.

Benefits to board dynamics include a ‘humanizing’ effect when board members could see each other in their home environments, allowing them to relate to each other in a different way than in person. Gene Takagi has seen that in high functioning boards there is more attention specifically paid to getting to know each other better including open sharing about life outside of work and the board. He noted a fuller, different type of interaction when board members were asked how they were feeling and how they can be there for each other, something that wasn’t done during in-person meetings. DEI discussions were also mentioned by many as a benefit, though these may have come up in an in-person environment as well given the racial justice movement that arose during the pandemic.

**Feedback about virtual meetings.** The importance of asking for feedback about virtual board meetings from board members came up several times during my interviews. Suggestions included sending a survey after each meeting asking board members what went well, what could be done differently and any suggested improvements. Using polls and thumbs up and down icons or randomly asking board members what they liked or what they learned at the end of meetings were also suggestions for gaining feedback to improve virtual board meetings. Feedback is

important for improving any kind of board meetings, but in a new environment where everyone is adapting feedback is even more critical in order to have effective meetings.

### **Future of board meetings**

Bob Harris put it well when he said, ‘The pandemic has caused the biggest transformation in governance in a century’ (Harris, 2021). As we slowly move toward an end to Covid restrictions I wondered what my experts thought about the future of board meetings. The term the ‘new normal’ is bandied about all the time now, but according to Mary Byers “The new normal is what happens to us, but the ‘next normal’ is what we create as a result” (M. Byers, Expert Interview 4, March 18, 2021).

Almost all agreed that there would either be hybrid meetings or that boards would meet some of the time in-person and some of the time virtually. Statewide and national boards may continue to meet virtually most of the time with only one or two in-person meetings a year. Jim Anderson said his board plans to have fewer in-person meetings than pre-Covid but to make them more special. Boards that used to meet quarterly may now shift to more frequent but shorter meetings to keep engagement and momentum between meetings. Anderson thought his board may continue to hold single-subject board meetings virtually to enable the board to focus on a specific topic, something they began doing during the pandemic.

Gene Takagi thought that industry-specific virtual products will likely be developed making virtual board meetings more effective in the future. Keith Darby felt that there would be another learning curve for nonprofits moving to a hybrid environment as boards will need to learn to negotiate discussions with two different types of participation. This will likely have flow-on effects with board dynamics and communication.

Having the ability to meet more often in a virtual environment was also cited as a potential positive impact on diversity of boards as it provides more accessibility to those who otherwise may not have been able to participate due to work or family obligations or other limitations. Virtual meetings can also be a back-up plan for future pandemics or natural disasters. For someone like myself living in California where there is increasing destruction from yearly wildfires, not to mention earthquakes, having virtual meetings as a way to continue organizational governance is very important.

Many felt it was important to keep the efficiencies of virtual meetings, such the use of consent agendas to approve reports and continue to question processes, for example asking,

‘Does it make sense to continue doing this?’ Mary Byers emphasized the importance of harnessing technology for governance efficiencies or boards may lose their enthusiastic members because they are so time pressed and in demand.

The need for intentional meeting planning and facilitation was widespread among the experts I spoke to. Being more thoughtful and deliberate about every aspect of board meetings is critical. This includes deciding how the meeting will flow, the cycle of meetings, planning the overall agenda as well as individual agenda items, determining the best way of facilitation (often dependent on the meeting environment) and deciding what kind of meeting would be best – virtual, in-person or hybrid. This year of virtual board meetings has revealed the value of relationships in boards and there was a general sense that in-person meetings should be used for board learning, discussions of culture and hard issues, as well as what Julia Wilson termed ‘sparks’.

As Teresa Excinia looks ahead to the many questions that the future of board meetings brings, she thinks that “navigating the next phase is difficult [but] there is no going back” to what we used to do. (T. Excinia, Expert Interview 11, April 19, 2021). As Mary Byers so wisely put it,

The drive to go back to what we did before will be strong. If we do it’s a missed opportunity to innovate and change going forward. Take this opportunity to be different. It is imperative for association boards to learn from this last year and drive looking through the windshield, not the rearview mirror (M. Byers, Expert Interview 4, March 18, 2021).

### Survey Data

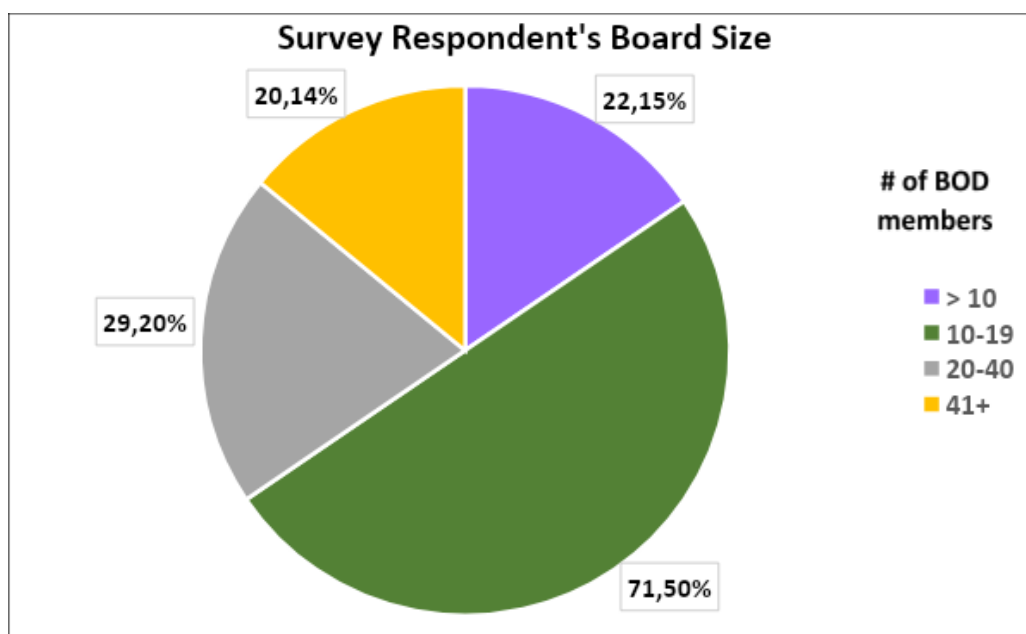
The survey was open from March 24, 2021 to April 23, 2021. 145 respondents from 101 organizations completed the survey, Table 1 shows the organizational role of the respondents.

**Table 1: Organizational Roles (n=145)**

Organizational Role	Number	Percentage
ED/CEO	92	63%
Board President	15	10%
Board member other than Board President	36	25%
Other	2	1%

The number of board members ranged from a low of 5 to a high of 115 (wow!). I grouped board size into categories of less than 10, 10-19, 20-40 and 41+ board members. Results are displayed in Figure 2.

**Figure 2: Survey Respondents Board Size (n=142)**



The majority of boards represented in the survey met monthly with another third meeting 4 to 6 times a year. See Table 2 for information about board meeting frequency.

**Table 2: Board Meeting Frequency (n=145)**

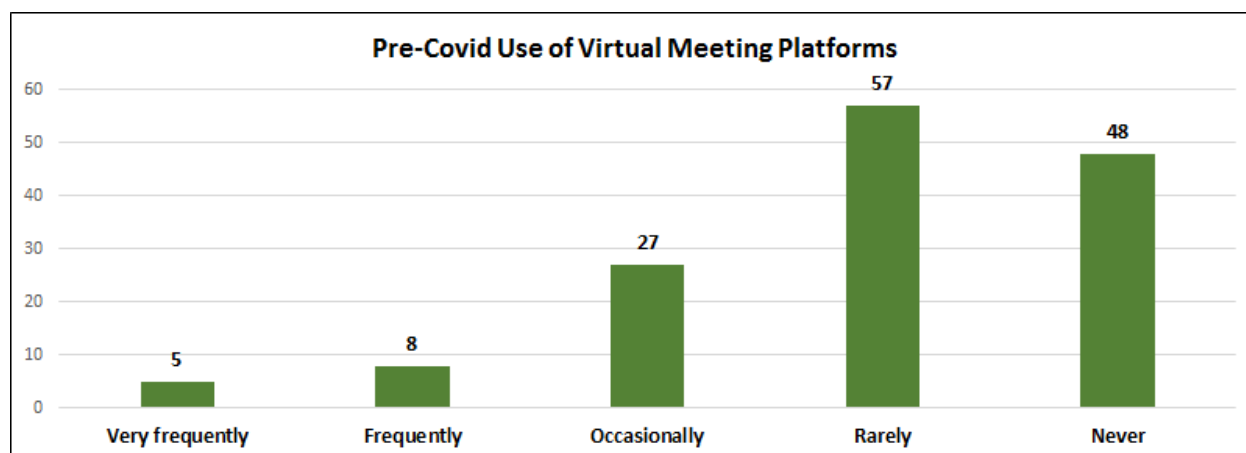
How often does your board meet?	Number	Percentage
Monthly	79	55%
Quarterly	26	18%
5-6 times/year	25	17%
Other	15	10%

Respondents were asked what meeting modality they used before Covid restrictions required boards to move to virtual meetings. Respondents were able to choose all meeting modalities that they used. The vast majority, (84%, 138) of boards held in person meetings, with much smaller amounts holding telephonic or virtual meetings. This corresponds with what my expert interviewees said that almost all nonprofit association boards met in-person pre-Covid and therefore the move to virtual board meetings was a big change for these boards. See Table 3 for details.

**Table 3: Type of Board Meeting Held Pre-Covid (n=142)**

<b>What type of board meetings did your organization hold pre-Covid? Please choose all that apply</b>	<b>Number</b>	<b>Percentage</b>
In Person meetings	138	84%
Telephonic	19	12%
Virtual	6	4%
Other	1	1%

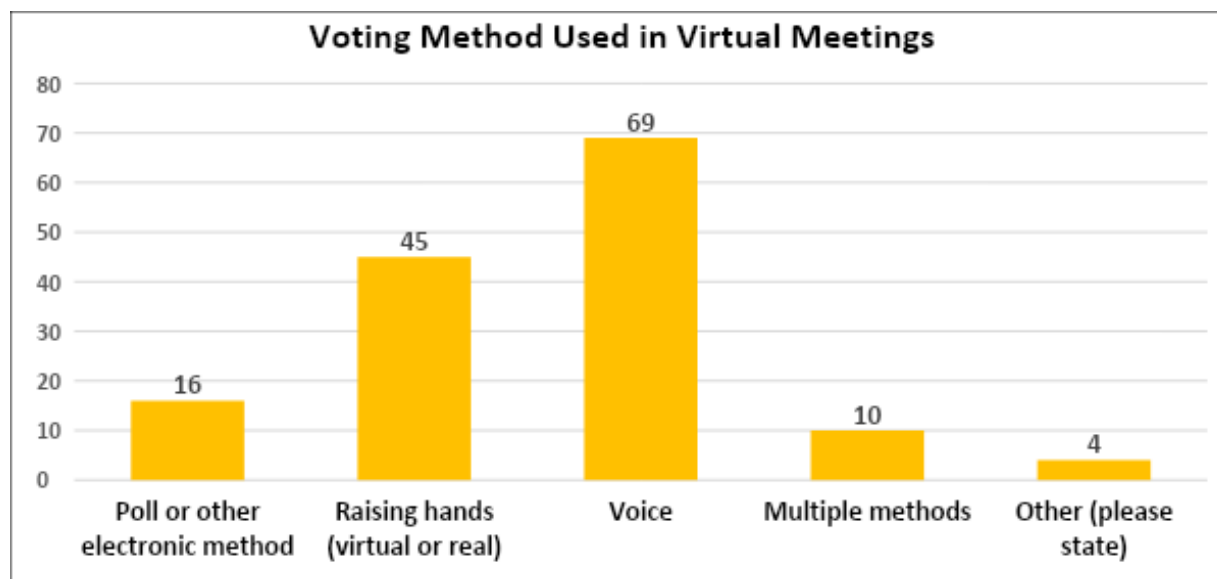
To get an idea of respondent's experience with virtual meeting platforms I asked how often they had personally used virtual meeting platforms before Covid. The majority (72%, 105) had rarely or never used virtual meeting platforms, in fact one-third (48) of total respondents had no experience with virtual meeting platforms at all before Covid. This tells me that survey respondents were not only dealing with a change in the way their boards met, but also meeting in an environment that most of them had very little or no experience with. See Figure 3 for the complete breakdown.

**Figure 3: Pre-Covid Use of Virtual Meeting Platforms (n=145)**

## **Governance**

An important part of board governance is voting on motions, so I wanted to know what methods boards used for voting during virtual meetings. Surprisingly to me, 48% (69) of respondents indicated they use voice votes, with another 31% (45) used raised hands (virtual or real). Since only one voice can be heard at a time on Zoom I was very curious how voice votes worked. See Figure 4 for results.



**Figure 4: Voting Method Used in Virtual Meetings (n=144)**

I further explored voting methods to see if they varied depending on board size and found that board size did make a difference in the use of voice votes with 68% (15) of boards with less than 10 board members using voice votes compared to only 30% (6) of boards with 41+ members. I did not ask specifically how voice votes were taken, whether by roll call method or otherwise, My guess is that the method would likely impact the reliability of these votes. In addition, the use of polls increased with board size, with no boards of less than 10 members using polls and 35% of 41+ member boards using polls. My assumption is that it would be much easier to determine voting consensus with a large group using a poll. Table 4 shows the steady decreased use of voice votes with increased board size and the increase in use of polls with increasing board size.

**Table 4: Voting Method Used by Number of BOD Members (n=141)**

Voting method	Number of BOD Members							
	>10		10-19		20-40		41+	
	#	%	#	%	#	%	#	%
<b>Voice</b>	15	68%	34	49%	12	41%	6	30%
<b>Hands</b>	7	32%	21	30%	13	45%	4	20%
<b>Poll</b>	0	0	5	7%	2	7%	7	35%
<b>Multiple/other</b>	0	0	10	14%	2	7%	3	15%
<b>Total</b>	22		70		29		20	

Asked to describe their level of success in participating in virtual board meetings on an 11-point scale where 0=no success at all and 10=very high success, the respondents mean for virtual board meetings (n=144) was 8.8 (sd=1.38) where 47% of respondents chose 10 and another 21% chose 9. The same scale was used to describe respondents' level of success in participating in in-person meetings. In this case the mean (8.5) was similar to virtual meetings with a slightly wider standard deviation (1.86). For in-person board meetings 41% of respondents chose 10 and another 19% chose 9. Interestingly, the lowest score on virtual meetings was a 4 but for in-person meetings there were 4 responses in the 0-3 categories. See Table 5 for details.

**Table 5: Level of Participation Success Virtual vs. In Person**

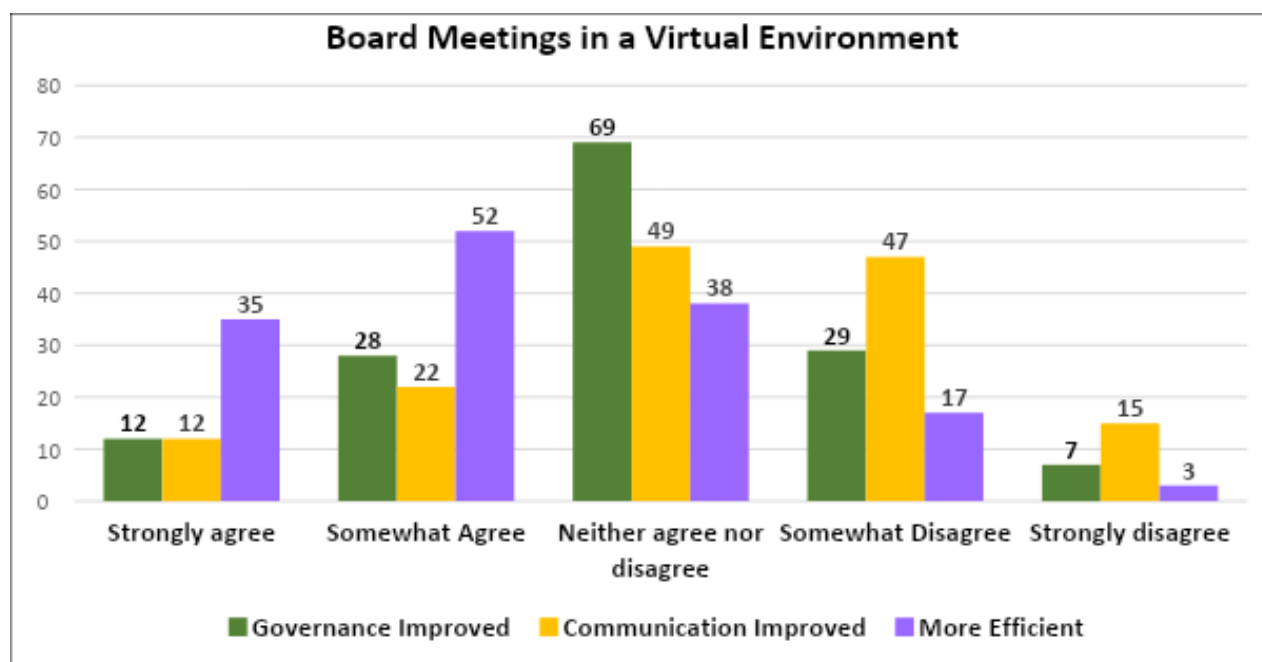
<b>Describe your level of success in participating in board meetings</b> (0 = no success at all, 10 = very high success)	<b>Virtual</b> n=144 m=8.8, sd=1.38	<b>In Person</b> n=143 m=8.5, sd=1.86
0	0	0
1	0	0
2	0	2
3	0	1
4	1	1
5	5	6
6	4	7
7	11	12
8	25	28
9	31	27
10	67	59

Respondents were asked about their preparation for virtual meetings vs. in person meetings (n=145). The vast majority (77%, 112) felt they were prepared about the same, 19% (28) felt more or much more prepared while 4% (5) felt less or much less prepared.

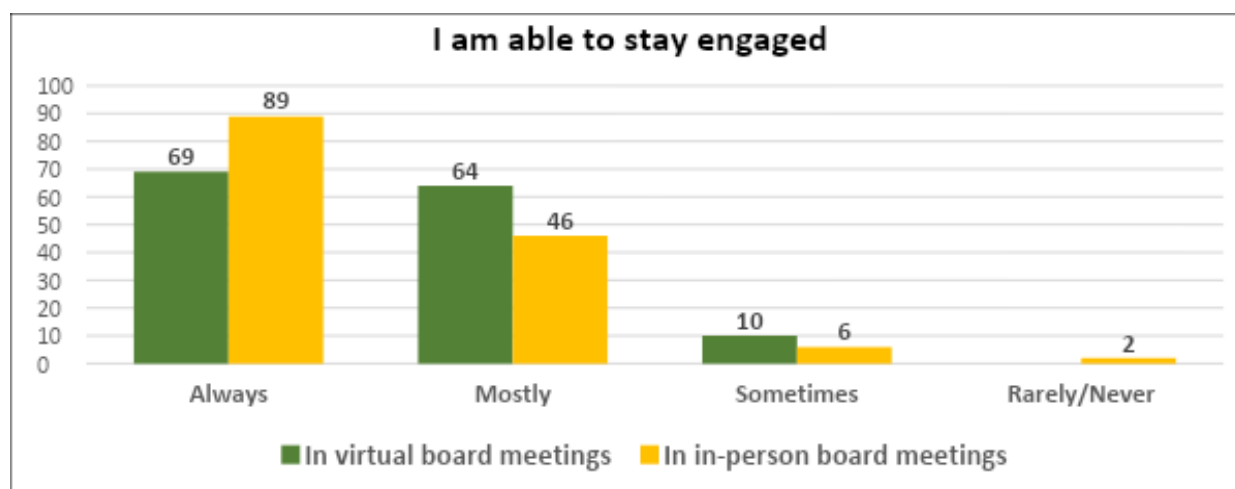
When asked about whether they agreed with the statement that board meetings are more efficient when held in a virtual environment, using a 5-point Likert scale of Strongly Agree to Strongly Disagree, 60% (87) of respondents strongly or somewhat agreed. This goes along with what my experts had mentioned that board meetings tended to be shorter in a virtual environment, very likely due to zoom fatigue.

When asked whether they agreed that board governance improved in a virtual environment, using the same 5-point Likert scale, almost half (48%, 69) of survey respondents didn't agree or disagree, while almost exactly the same amounts somewhat agreed (19%, 28) and somewhat disagreed (20%, 27). See Figure 5 for details on virtual meeting governance, communication and efficiency.

**Figure 5: Board Meetings in a Virtual Environment (n=145)**



Respondents were asked about their ability to stay engaged in virtual and in-person meetings, using a 5-point Likert scale of Always, Mostly, Sometimes, Rarely and Never. Considerably more board members are always able to stay engaged in in-person board meetings (89) as opposed to virtual meetings (69), though when combining Always and Mostly together the two meeting modalities are almost identical in engagement levels (136 for in-person, 133 for virtual). A board's duty of care responsibility can be significantly impacted when board members are not engaged as they may miss critical information needed in decision making. See Figure 6 for results.

**Figure 6: Board Meeting Engagement Virtual vs. In-Person (n=143)**

The majority (57%, 82) of respondents said the structure of their board meetings had changed very little or not at all. Whereas another 43% (62) said their board meeting structure had changed moderately, significantly or completely. I did not ask why the board meeting structure changed or what changes were made. These would be interesting areas to explore further. See table 6 for details.

**Table 6. Structure of Board Meetings Changed in Virtual Environment (n=144)**

<b>The structure of my board's meetings have changed in a virtual environment.</b>	<b>Number</b>	<b>Percentage</b>
Completely	6	4%
Significantly	14	10%
Moderately	42	29%
Very little	69	48%
Not at all	13	9%

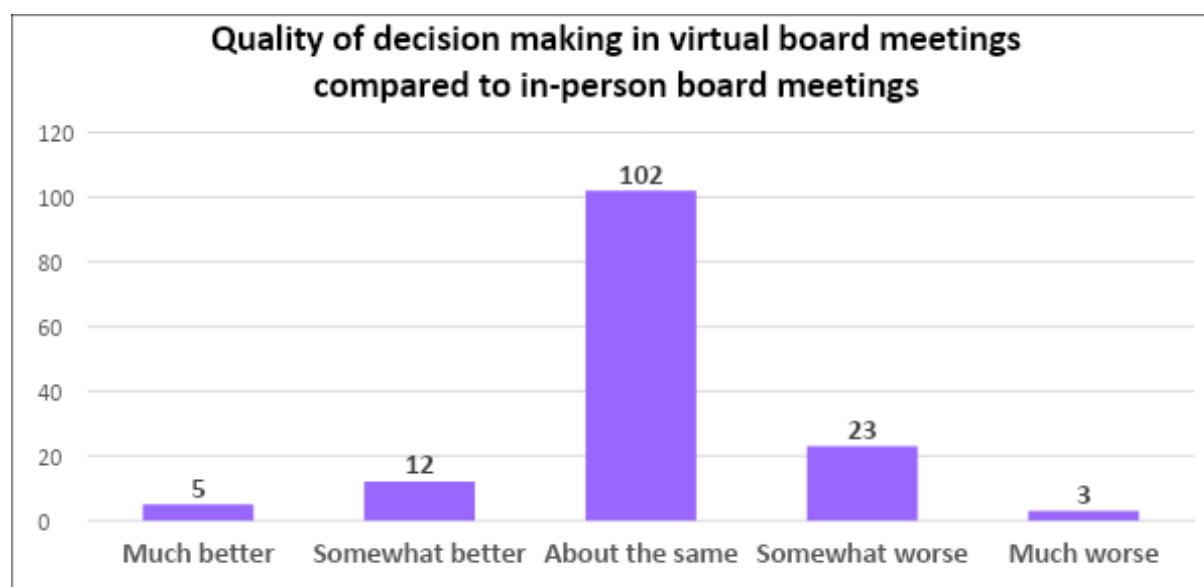
I was interested to see if board size had any effect on whether the structure of board meetings changed in a virtual environment. A scale of 1-5 was used where Completely =1 and Not at All=5. A one way ANOVA was performed and the differences were statistically significant ( $p=.021$ ) with boards of less than 10 more likely to see changes in the structure of their board meetings. See Table 7 for details.

**Table 7. Structure of Board Meetings Changed in Virtual Environment by Board Size**

Number of Board Members								F-statistic (df1, df2)	p-value
>10 n=22		10-19 n=71		20-40 n=29		41+ n=20			
M	SD	M	SD	M	SD	M	SD		
2.91	0.92	3.55	1.00	3.66	0.86	3.55	0.69	3, 138	0.021

Quality of decision making (n=145) was thought to be very good by 36% (52) of respondents, with 39% (57) indicating good, 21% (31) satisfactory and 3% (5) poor. But comparing decision making in virtual meetings with in-person meeting decision making, while 70% (102) rated it about the same, those who rated it somewhat worse had almost double the number of respondents than those who rated it somewhat better. See Figure 7.

**Figure 7: Quality of Decision Making in Virtual Board Meetings Compared to In-person Board Meetings (n=145)**



The overwhelming majority (88%, 127) of survey respondents found virtual meetings to be very convenient, with none of the survey respondents finding them inconvenient. This was echoed by my expert interviews, and is likely a big contributor to the increased meeting attendance that many respondents indicated. See Table 8 for details.

**Table 8: Convenience of Virtual Board Meetings**

<b>How convenient have you found virtual board meetings? (n=144)</b>	<b>Number</b>
Very convenient	127
Somewhat convenient	12
About the same	5
Somewhat inconvenient	0
Very inconvenient	0

This convenience likely led to an increase in attendance at board meetings, an important aspect of governance. If board members are not present at board meetings they are not able to lend their ideas to discussions or vote on motions. More than three-quarters of survey respondents stated that their attendance at virtual meetings was the same as in-person meetings with another 21% saying that they had attended more virtual meetings than in-person. See Table 9 for the breakdown.

**Table 9: Attendance at Virtual Board Meetings Compared to In-Person**

<b>How has your attendance at virtual board meetings compared to in person meeting attendance? (n=144)</b>	<b>Number</b>	<b>Percentage</b>
I have attended more meetings	30	21%
I have attended the same number of meetings	109	76%
I have attended fewer meetings	1	1%
I have only attended virtual meetings	4	3%

### **Communication**

56% (81) respondents (n=144) found communication to be extremely or very effective in virtual board meetings while 36% (52) found it to be moderately effective, 7% (10) slightly effective and 1 (>1%) not effective at all. Comparing communication effectiveness in virtual to in-person meetings shows something different, however, with twice as many respondents finding communication effectiveness in virtual meetings to be somewhat or much worse (56) compared to those who found communication in virtual meetings to be somewhat or much better (28). See Table 10 for this comparison.

**Table 10: Communication in Virtual vs. In-Person Board Meetings (n=145)**

<b>How does communication effectiveness in virtual board meetings compare to communication at in-person meetings?</b>	<b>Number</b>	<b>Percentage</b>
Much better	7	5%
Somewhat better	21	14%
About the same	61	42%
Somewhat worse	51	35%
Much worse	5	3%

Communication concerns were even more pronounced when comparing communication in the different meeting modalities. Only 23% (34) strongly or somewhat agreed with the statement that board communication was improved in a virtual environment, 34% (49) didn't agree or disagree and 43% (62) somewhat or strongly disagreed. See Figure 5 for details.

Finally, I asked how respondents felt after virtual board meetings and after in-person board meetings with a smiley face to frowny face indicator scale. In-person meetings had almost one & half times as many responses with the highest smile level (54) compared to virtual responses with the highest smile level (37) and virtual meetings had a much higher frown rate (13%) than did in-person board meetings (2%). This tells me that in-person board meetings were more positive for many survey respondents and may be less stressful than virtual board meetings. See Table 11 for ratings grouped into three categories (medium and big smile are grouped in the smiling face category, neutral face is its own category and the medium and big frown are grouped in the frowning face category). Appendix C has the detailed breakdown for each category.

**Table 11: How Do You Feel After Virtual and In-Person Board Meetings**

<b>After virtual meetings</b>	<b>Feeling</b>	<b>After in-person meetings</b>
106 (77%)	Smiling face	121 (81%)
14 (10%)	Neutral face	13 (9%)
17 (13%)	Frowning face	3 (2%)

## **Survey comments summary**

Following are a summary of comments made by survey respondents grouped into benefits and challenges of virtual board meetings. A full listing of individual comments is included with the survey results in Appendix C.

### **Benefits of Virtual Board Meetings**

#### Increased Communication

- Virtual better than telephonic meetings that many associations had in the past
- Conservative, quieter people may prefer communicating in virtual meetings
- Fewer distracting sidebar conversations – improved attention
- Greater participation ‘Leveling effect that encourages more diverse participation’
- Better focus

#### Increased Attendance

- Increased attendance – almost all who commented cited this as a benefit. More convenient, easier for people to attend, flexibility of where members can attend from, more time with family, travel, get work done.
- Can bring in experts to assist in making informed decisions

#### Other

- Many noted decreased costs for travel, food, accommodation
- Decreased travel time.
- Shorter meetings
- More efficient
- Good for minor tasks
- Less work for staff, especially day of board meeting

### **Challenges of Virtual Board Meetings**

#### Loss of Social/connection building

- Loss of in-person connection
- Communication is more time consuming
- Hard to judge if people are paying attention, easier for people to attend but not ‘show up’
- In person better for discussion and socialization, camaraderie and engagement
- Cameras off make it difficult to connect and engage
- Hard to read the room, body language



- Social engagement with peers is important, especially in professional associations

#### Relationship challenges

- Less empathy for others, more acting out
- Not as collaborative and cohesive
- New board members struggling to fit in
- Establishing trust harder in virtual
- Difficult to develop personal relationships especially with new board members
- Missing the networking before and after meetings

#### Decreased discussion

- Generative conversations lost - post meeting discussions, idea exchanges, when projects and initiatives get launched and done (i.e. water cooler talk)
- More transactional, less thought-provoking interactions. Less debate, lack of in-depth discussion, quality and depth of conversations decreased
- Lost interaction from some because it is harder to chime in
- Lack of side-bar conversations that help with decisions, bringing up related issues
- People checking out – looking at phones, multitasking, other distractions
- Easy to unintentionally interrupt others, only 1 person can talk at a time
- Longer discussion because people are not paying attention, dominators

#### Other

- Feel tired after virtual meetings, in person left feeling upbeat
- Get less done
- ED/Chair has to plan further ahead about meeting logistics

## **Section 5: Discussion and Implications**

Prior to Covid, nonprofit association boards had almost always met and made their collective decisions in person. As Bob Harris put it “The move to virtual board meetings is the biggest change to board governance in over a century.” (Harris, 2021). This cannot be understated and what I have learned through this project is that while virtual meetings have some benefits – they are superior to telephonic meetings, increased convenience leading to better attendance, decreased meeting costs and shorter, more efficient meetings - the challenges are not small ones and have potentially very negative consequences for associations.

The move to virtual meetings was a huge change for board members as evidenced in the survey showing that most had never or rarely used a virtual meeting platform before Covid, so they were not only dealing with a different way of governing but also of interacting with others.

### **Communication challenges impact on board relationships**

Communication concerns came up as a major issue in my literature review, expert interviews and survey data, both in answers to categorical as well as open-ended questions. Communication problems arise for many different reasons - not having social interaction time before and after meetings, not being able to understand people’s body language, distractions and the ability for people to be present but not participate. According to Guo et al., the usual social processes that enable communication and decision making are lost in a virtual environment (2009). Hinds & Bailey (2003) found that virtual environments create negative effects in relationships such as reduced cohesion and consensus, lower trust and less of a sense of belonging on a team. My survey found that 42% of respondents somewhat or strongly disagreed with the statement that board communication is improved in a virtual environment, compared to only 24% that strongly or somewhat agreed with the statement. While many found communication to be extremely or very effective in virtual meetings, when asked to compare virtual meeting communication effectiveness to in-person meetings, more than double the number of survey respondents said communication effectiveness was much or somewhat worse than those who said it was much or somewhat better. Keith Darby noted in his expert interview that while there was better attendance at virtual meetings, board members were putting in less effort and there was a reduction in engaged voices. (K. Darby, Expert Interview 8, March 25, 2021). Communicating and making effective decisions are critical to ensuring the board's duty of care responsibilities are met. Communication that was implicit in in-person meetings such as

head nods, shifting in seat, has to become explicit in order to be understood and noticed by board members in a virtual environment.

Many survey respondents indicated that another loss was the after-meeting discussions where new ideas and enthusiasm often percolated. Virtual meetings appear to have led some people to feel that they can't engage and connect, and there is less cohesion and empathy. Looking at the survey responses as to how people felt after virtual vs. in-person board meetings, it could be that people were happier after in-person meetings because with virtual they have already spent so much time on zoom, and they are dealing with distractions during meetings making it hard to focus. Whereas in in-person meetings they were able to focus solely on the meeting discussion and also spend time building relationships with others. One of the survey respondents put it well

To the extent that virtual attendance improved, the governance is improved. However, when a virtual meeting is over - that's it. The in-person meetings...left room for lingering issues, burning questions and general debriefing...a precious time to learn more, grapple with different personalities, brainstorm, etc. (Anonymous survey respondent).

The impact on onboarding new board members is also a concern. After a year of the pandemic, most boards have new board members who were brought on during this time of virtual meetings and many also have board members who had been on their boards for only a few months when the pandemic hit. It can be even more challenging to get to know others virtually when meetings are episodic, as board meetings are. How will this lack of social connection impact boards going forward? Both my experts and survey respondents raised concerns about effectively integrating new board members and felt that it was much more difficult to get to know new board members well in a virtual environment.

### **Virtual meeting impact on board governance**

As Marla Cornelius stated "Governance is about relationships" (M. Cornelius, Expert Interview 5, March 22, 2021). The loss of in-person connection and interaction that leads to challenges in being able to communicate effectively, as well as the reduction in quality and depth of discussion, are very concerning to the long-term effective governance of organizations. If boards become solely transactional and operational focused, they will not be able to fulfill their job of long-term strategic planning for their organizations. Survey respondents felt they could participate just as well in virtual as in-person meetings and the majority thought virtual board

meetings were more efficient. I did not ask in my survey whether respondents' board meetings were shorter in the virtual environment, though in my expert interviews most indicated meetings were shorter because of zoom fatigue. Whether efficiency is good or bad for governance is another question. In the survey comments many expressed concerns about the lack of in-depth discussion. While 70% of survey respondents felt the quality of decision making was about the same in virtual meetings, twice as many (16%) felt that decision making was somewhat worse in virtual meetings than those who felt it was somewhat better (8%).

This ability to focus on the organization's strategic needs is even more crucial now because of the financial hit many organizations have taken due to Covid restrictions on their activities and the increased need that their clients/members have because of the pandemic. Many associations have had to downsize and have even fewer resources than they did pre-pandemic. If there are fewer interactions between board members and the interactions that do happen are not as in-depth and of lower quality, the ability to think strategically and appropriately for the organization will be impacted just at the time when boards need to be more strategic and aware of the potential consequences of their decisions. As Jennifer Lewin noted, ED's and CEO's are having to take on more responsibility for strategic planning, which is a heavy lift given the increased work in managing their staff and organizations virtually.

The biggest surprise in my survey findings was the number of boards that use voice as a method of voting in virtual board meetings. I expected more boards would use polling or raising of hands, and it does appear that board size is related to use of voice votes with smaller boards more likely to use voice voting than larger ones. I wonder how the chair can determine what constitutes a consensus in a virtual voice vote when only one voice can be heard at a time on Zoom. Perhaps some organizations use a voice roll call method for voting, though that could be a very time-consuming process for larger boards. If indeed group voice votes are being used as a method of voting on Zoom, that is a governance concern as it does not seem to be an accurate way of establishing consensus. When discussing the specific issue of voting in virtual meetings with Julia Wilson in our expert interview she indicated that it was important to slow down and explain the voting process to the board so that it was very clear how votes would be taken, and include the process in meeting minutes so it is documented for future.

Wilson feels that during transitions in routines of meetings board leaders have to be very explicit about how procedures and processes will be carried out and to make sure to record the

lessons the board has learned and any shifts that have occurred. This is important to consider as boards look at another shift either back to in-person meetings or to a combination of virtual, in-person and perhaps hybrid meetings.

### **What the future holds for board meeting modality**

Many experts indicated that future board meetings may be hybrid, or combination of some in-person and some virtual meetings. Leaders need to be very thoughtful of how these meetings will work and what may need to be done in advance, having very specific, intentional ways of relationship building with the board. 15% of survey respondents said that the structure of their board meetings has changed completely or significantly in a virtual environment and 28% said it has changed moderately. These changes give boards an opportunity to see that they can do things differently and to question the assumptions of the status quo. This is very positive for board governance.

This year of learning from virtual meetings is an opportunity for boards to reflect and reevaluate how their meetings should be run. What is the best way to carry out their duties? My survey showed that board members and ED/CEO's overwhelmingly like the convenience of virtual meetings, as they can help them balance their many duties – work, family, and other volunteer commitments. Boards can consider not staying solely virtual or going back to only in-person meetings, but instead could have a combination. In person meetings could be used for more in-depth discussion and virtual meetings might be used for more transactional work or to bring in experts and other speakers who couldn't otherwise attend meetings to speak to the board. Using pre-work, asking board members to contemplate ideas and actions before meetings, and written reports instead of oral ones can allow for board time with a more strategic focus.

Many of my experts brought up the importance of boards making use of the positive technology tools of virtual meetings to ensure all members are heard. Breakout rooms for small group discussion can allow quieter members to participate in a different way. As one survey respondent put it 'Virtual meetings are a leveler'. Boards should harness this ability to bring in different voices and turn up quieter ones. For those who are less verbal-oriented, writing down thoughts/suggestions/ideas isn't always an option for in-person meetings but can be employed easily in a virtual meeting through the use of chat, whiteboards and annotation.

Nonprofit boards often struggle to work strategically, and this move to virtual provides an opportunity to change that dynamic by bringing in more strategic players and increasing board

member training and education on what it means to be a strategic board. Organizations may end up with more committed board members because they are not just attending meetings to listen to a bunch of reports but instead to make lasting effective change. This is very important as there is still a lot of upheaval to come post-Covid for nonprofits of all kinds. Members and clients need their services more than ever as they struggle to cope with the changes wrought from Covid and boards need to be prepared to lead the way.

## **Section 6: Recommendations**

A board's meeting modality shouldn't affect its ability to govern. Governance involves having in depth discussions, hearing all viewpoints and making sure everyone has an opportunity to participate equally before coming to consensus. Communication can have a large impact on a boards ability to govern, and virtual meetings have caused us to see how much non-verbal communication impacts a boards ability to effectively work together. Below are ways to navigate this impact and be strategic and thoughtful in designing and running virtual and hybrid meetings.

### **1. Focus on meeting dynamics and communication**

- It is more difficult to concentrate in a virtual board meeting (especially for the board chair) so, build in breaks so items aren't missed or misunderstood. For longer meetings take a 10 minute break every 90 minutes.
- Social time is even more important in a virtual environment, so board members feel understood and are an important part of the team (Marsh McClellan Companies, 2021). Give people a chance to know each other at every meeting (Zitter & Huggett, 2021). Do a virtual icebreaker or check in at the start of each meeting (Kanter, 2017, Bisbee & Wisniewski, 2019). Mary Byers suggests making these check-ins fun and/or off the wall so people have an opportunity to learn something different about each other. Another idea is to ask board members to share their gifts and hooks – sharing the gifts they want to bring to the group and what will hook, or engage, them in board meetings (Kanter, 2017). Another option could be to open the board meeting early for an informal social time or leave the room open after the meeting is over to continue conversations.
- Encourage board members to take care of each other – reinforce a culture of inclusive concern for well-being of organizations and people (Deloitte, 2020). Have board members share about their life outside of work and the board. According to Gene Takagi, high-functioning boards make sure to look after each other.
- Include a short review at the end of the meeting to make sure everything has been achieved, summarize key findings and ask for any last contributions (Brennan et al., 2020).
- Have smaller subcommittees work together outside of meetings to build relationships and board cohesion (Zitter & Huggett, 2021).

- Interacting via social media can help board members to stay involved in between meetings, be more engaged and get to know other board members personally (Dyak, 2021).
- When the board is meeting in person, make those meetings more special and build in more casual social time.

## **2. Board Meeting Pre-work**

- Virtual meetings have to be more strategic than in-person meetings (Oranburg & Khan, 2021). Marla Cornelius stated that board chairs and CEO's need to be designing toward a goal, they can't just show up and expect the meeting to go well. Create a clear and viable agenda and format (Boardsource, 2020, Young, n.d., Brennan et al., 2020). Questions such as 'What should be on the agenda? What do we want to accomplish? What do board members need to consider in advance?' should be asked.
- To optimize meeting efficiency and effectiveness have board members do pre-work before meetings (Barker, 2020, Young, n.d.). Conveyance (exchanging information) can be asynchronous (Egea, 2006), so get low-level information out before meetings. Underscore the importance of reading and digesting board materials in advance. Have as much information from committees/proposers in board materials so board members can understand what they are being asked and the work that has already been done.
- 'Flip the boardroom' to make meetings more efficient and high level. (Oranburg & Khan, 2021). Survey board members before the meetings to find out the general feeling about an issue. Julia Wilson suggests sending prompting questions out for board members to start considering before meetings. This helps to increase engagement and allows the board to spend more time on high-level topics.

## **3. Dealing with Groupthink**

- To counteract groupthink, it is important to make sure everyone is heard (Acai et al., 2018, Brennan et al., 2020, Barker, 2020). According to Jennifer Lewin, this may require explicit requests for individual participation from the board chair or a specific request to hear downsides or different points of view. Use virtual technology such as breakout rooms, whiteboard and chat to allow for increased participation from more introspective board members.



- Ensure a balance of enough time to talk about key issues, while understanding that participants have a decreased ability to concentrate in a virtual environment (Barker, 2020). This is where the meeting pre-work mentioned above can help increase board efficiency as board members can have time to prepare themselves for discussions.
- Jan Masaoka and many others suggest appointing a devils' advocate so that different opinions can be brought up and discussed (Acai et al., 2018, Brennan et al., 2020, Barker, 2020). This can be done before the meeting so that background research can be done by the devil's advocate if necessary.
- The chair should wait until everyone else has spoken before they tell their own perspective so as not to influence anyone's decisions (Barker, 2020).
- Having a diverse board can help to combat groupthink according to Barker (2020) and several of my experts.
- Bring in external experts for a different perspective or to provide more detailed information.

#### **4. Effective use of virtual technology**

- According to Julia Wilson, breakout rooms can create a generative space, especially for quieter board members. Utilize them so everyone can have a chance to talk and learn from each other (Zitter & Huggett, 2021).
- Design information provided during meetings to be engaging (Oranburg & Kahn, 2021). Jan Masaoka mentioned that this seems to be something that many ED/CEO's do not do and it can make a real difference in board engagement.
- Because of potential distractions in people's environments board chairs need to use multiple ways of keeping members focused and interested. Screen sharing, polling, hand raising and using chat for questions, answers and sharing resources are all excellent methods (Dyak, 2021). Mary Byers mentioned that there are also a variety of virtual tools available outside of meeting platforms that can assist with engagement such as Spark, Pickles and Prezi.

#### **5. Importance of strong board chairperson**

- The board chairperson's role is critical to effectively running board meetings, but never more so than in virtual board meetings. The chair must ensure everyone is heard and feels equally valued and that no one dominates (Brennan et al., 2020, Barker, 2020, Van

Puyvelde et al., 2018). The chair sets the tone for meetings (Barker, 2020) and ‘Create(s) a line for participants to follow’ (Kanter, 2017). This requires broad shoulders and a good deal of support from the ED/CEO.

- In addition, Julie Wilson indicated that the chair must have emotional intelligence. They must be aware of interactions and reactions of the group in order to create a safe environment and minimize power differentials (Young, n.d.).
- Culture (understanding unwritten rules and norms of the organization to get a sense of belonging with peers) is more difficult to understand in a virtual environment so the chair must pay attention to engagement and be more intentional about information and resources provided and how the meeting will flow. The 2020 Boardsource report emphasized the importance of the chair paying close attention to agenda timing, and ensuring timely start and close to meetings.
- Because of the increased amount of work in their role, board chairs should consider assigning roles to other board members so they don’t have to do all the work (Zitter & Huggett, 2021).
- To help with relationship building, the chair should check in with board members outside of meetings (Deloitte, 2020).

## **6. Virtual meeting etiquette/rules of engagement**

- To allow for better focus, suggest members be in a quiet space, use a headset and mute themselves when not talking during board meetings (Brennan et al., 2020). Ask members to use the hands-up function to alert the chair when wanting to speak (Oeppen et al., 2020).
- Ask everyone to keep their camera on if they are able, to make the meeting more like in-person and easier to see if people are paying attention (Oeppen et al., 2020). This can help to increase participation, an important component of the board’s duty of care.
- Co-create rules of engagement (Kanter, 2017), meeting communication standards, develop norms and expectations (Benetytė & Jatuliavičienė, 2013), and spell out the process for how things will work in a virtual environment (Pugliese et al., 2015). Set meeting goals and rules at the beginning and adhere to them (Egea, 2006).
- What was implicit through body language in an in-person environment needs to be explicit in the virtual world. Use careful and concise language, clear communication. Encourage

people to ask for clarification. It is important to address breakdowns through open and frank feedback (Egea, 2006).

- Boards work collectively to come to decisions. Emphasize the responsibility of each member toward the work that needs to be done and that all bear total responsibility (Aluaimi et al., 2014).
- Julia Wilson emphasized the importance of recognizing the need to make changes to board processes when working in a different meeting modality and being very explicit about the shifts being made. Documenting the transitions and any lessons learned will be very helpful for future decisions as board membership is often short-term and the reasons behind changes are often forgotten.

### **7. Role of Feedback**

- Evaluating virtual meetings is very important not only for making needed improvements but also for getting buy-in from board members (Kanter, 2017). Board members need to discuss how well they are governing and how to adapt to a changing environment.
- Reflective activities provide tools for ongoing team building that focuses on relational communication and helps build social relationships that create a more successful team working environment (Egea, 2006).
- At the end of meetings, review what worked and what didn't and ask for improvements (Benetytė & Jatuliavičienė, 2013, Brennan et al., 2020, Oeppen et al. 2020). Many of my experts felt this was even more important in a virtual environment since it is still a relatively new way to work together and everyone is learning what works best for them. Feedback will be even more critical to improving meeting effectiveness for any boards that move to hybrid board meetings.

### **8. Strategic Meeting Design**

- Nonprofit governance configurations may need long-term adjustments to board leadership and management activities (McMullin & Raggo, 2020). As Mary Byers put it, boards must "Drive using the windshield, not the rearview mirror". This is the time to challenge the operating model of the board, break out of 'this is how we always do it' and consider what is more effective (Oranburg & Kahn, 2021).
- Once things have shifted back to where boards can meet in-person more easily, they will need to consider how they want to conduct their meetings in the future. Given the

convenience factor of virtual meetings it is doubtful that many boards will go back to only in-person meetings. Most will likely have a combination of in-person and virtual meetings and potentially have some or all hybrid meetings. The governance, dynamics and communication needs of each of these meeting modalities will need to be thought through carefully. For example, if there is to be a combination of in-person and virtual meetings throughout the year, there needs to be a consideration of whether those meetings should cover the same sort of topics and issues or if different things should be discussed at in-person meetings when board members can get a fuller sense of board dynamics than at virtual meetings where social interactions can be more restrictive.

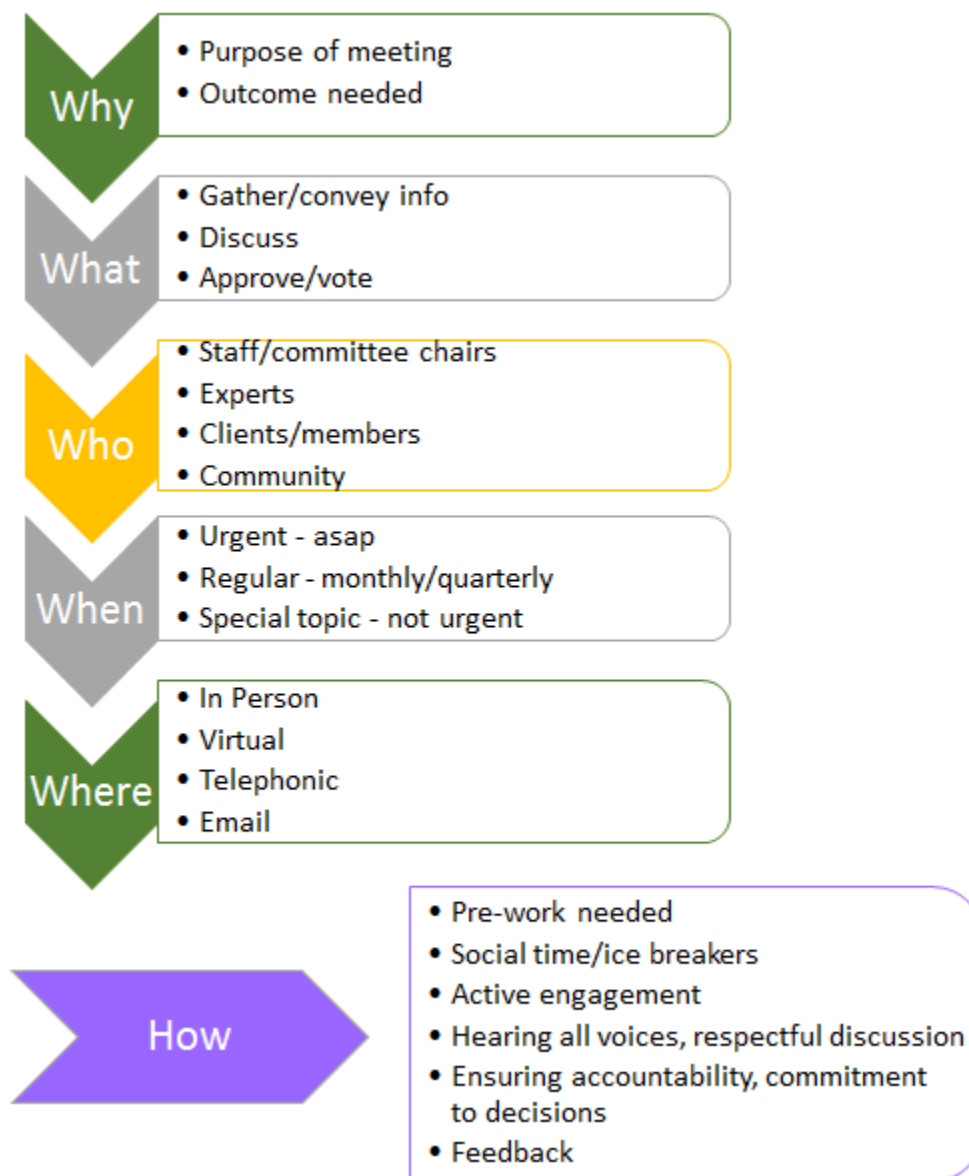
- In the case of hybrid meetings, boards will need to consider how to make them work effectively. How will participants in different meeting modalities communicate with each other? Will someone besides the chair be making sure everyone is engaged and participating? What needs to be explicitly discussed about how things are done differently in a hybrid meeting?
- There will be a period of adjustment and training just as there was when boards shifted to meeting virtually but now there is time to be more thoughtful and intentional about the best way to make the shift. For example, meeting start times may be different for virtual vs. in-person meetings. Will in-person meetings be longer and include an expanded social component? There are many things to consider, and ultimately it will depend on what is best for the organization and its particular group of board members.

Given these recommendations and the implications that I laid out earlier, I have created a board meeting modality considerations model to help boards think about the various factors that boards of directors need to consider when planning their meetings. See Figure 8.

The first consideration is the ‘Why’ - the purpose of the meeting and outcome needed at the end of the meeting. Once that has been determined, the ‘What’ has to be decided - will the meeting mainly be discussion? Is there a need to approve or vote on motions? Or is there a need to gather and/or convey information? Next is to figure out ‘Who’ needs to be in attendance, besides the board members and how they can attend. ‘When’ speaks to the urgency of the meeting - is this a regularly scheduled board meeting or is there an urgent issue to discuss right away, or maybe a special topic that the board wants to schedule a specific meeting to work on. All of that information then informs the ‘Where’ - what type of meeting modality would be

most appropriate. All of this rests on the base of the most important part in regards to effective board communication and governance which is ‘How’. At this point the ED/CEO and board chair can design the meeting to ensure there is the opportunity for inclusive in depth discussions, that board members are engaged and that the board is able to work collectively and collaboratively.

**Figure 8. Board Meeting Modality Considerations Model**



## **Section 7: Conclusion**

I began this project wanting to investigate how virtual meetings have impacted board governance, dynamics and communication. My own personal experience was that it brought many challenges and some benefits and that was borne out in the research that I conducted.

Virtual board meetings allowed nonprofit association boards to continue governing during a time of social distancing. While this type of meeting modality brings several advantages, such as increased attendance because of convenience, decreased meeting costs, and shorter, more efficient meetings, it is very important that boards understand and take into consideration the challenges to governance and communication that arise from meeting in a virtual environment. As it appears that in the future many boards will continue to meet virtually at least some of the time, boards must make sure to focus on building relationships so that the necessary in-depth discussions about organization's strategic needs can be held. The adjustment back to in-person meetings and/or to hybrid meetings will be the next big change for boards. This is the time to thoughtfully consider how best to structure meetings so that in any meeting modality all board members are able to participate and the board can work together collectively and collaboratively to ensure the ongoing success of the organization.

### **Benefits of research**

This research helps to bring to light the way virtual board meetings can benefit a nonprofit association as well as the governance and communication challenges boards face when meeting virtually. This research also provides recommendations for how boards can more effectively conduct virtual meetings and prepare for future board meetings that will likely involve a combination of hybrid, in-person and virtual meeting modalities. Many of these recommendations are applicable to all nonprofit boards, not just associations.

### **Limitations**

The professional networks I used for my survey distribution were very bar association heavy and leaned toward ED/CEO's and California-based associations. A more broadly-based association survey might show that different types of associations have different experiences with virtual meetings. For example, lawyers tend to better understand legal obligations, so these concerns may be more or less of an issue for associations outside of the legal industry. The wider nonprofit world can also be considerably different from the association sphere. Association boards are usually made up of professionals in a specific field whereas 501(c)(3) boards tend to

have a much more diverse group of board members leading to different experiences in board meetings.

Covid restrictions also impacted this study in different ways – most board members were working from home and experienced extra stress in both their professional and personal lives. There is also the impact of the racial justice movement and increased political polarization on board communications and dynamics. These topics were not explored in this project but were brought up by some of the expert interviewees.

Further study could include researching the experience of virtual board meetings more broadly within the nonprofit association sphere as well as the wider nonprofit world. The impact of virtual meetings on committee work is another area that could be explored. Finally, it would be interesting for a future MNA student to do a similar capstone in one to two years once nonprofits have been able to meet in person again to explore the changes in meeting modality and impacts on board governance and communication.

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### **Expert Interviews**

- Anderson, Jim. Expert Interview 9. March 29, 2021
- Byers, Mary. Expert Interview 4. March 18, 2021
- Cornelius, Marla. Expert Interview 5. March 22, 2021
- Darby, Keith. Expert Interview 8. March 25, 2021
- Excinia, Teresa. Expert Interview 11. April 19, 2021
- Harris, Bob. Expert Interview 1. March 11, 2021
- Lewin, Jennifer. Expert Interview 10. April 5, 2021
- Linn, Karyn. Expert Interview 2. March 12, 2021
- Masaoka, Jan. Expert Interview 7. March 24, 2021

Takagi, Gene. Expert Interview 3. March 17, 2021

Wilson, Julia. Expert Interview 6. March 22, 2021

## Appendix A: Capstone Expert Interview Questions

- Describe your experience working with nonprofit association boards.
- Thinking about large and small changes in your board meetings, what changes have you noticed while working with the board in the virtual environment?
  - What do you think has caused those changes?
- How have governance practices been impacted in this shift in the meeting environment?
  - What do these different practices mean for the future of nonprofit association boards/your organization?
- How have board dynamics been impacted by the shift to virtual board meetings?
  - What do these different dynamics mean for the future of nonprofit association boards/your organization?
- How have you seen nonprofits and their boards (or your org/board) benefit from virtual board meetings?
- How have virtual board meetings been challenging for nonprofits and their boards (or your org/board)?
  - Thinking about these obstacles, how were you able to overcome the challenges?
- How has the virtual board meeting environment been successful for boards you have worked with/your organization's board?
- Is there anything I should have asked you that I didn't?

## Appendix B: Capstone Survey

Thank you for taking this survey about your experience with virtual board meetings. All answers will be kept confidential and no identifying information will be used in the survey reporting.

What is the name of your association?

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Please state your role

- Executive Director/CEO (1)
- Board President (2)
- Board Member other than Board President (3)
- Other (please state) (4) \_\_\_\_\_

How many years have you served on this BOD or been ED/CEO?

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How many people are on your BOD?

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How often does your BOD meet?

- Weekly (1)
- Monthly (2)
- Quarterly (3)
- Other (please state) (4) \_\_\_\_\_

What type of board meetings did your organization hold pre-Covid? Please choose all that apply.

- In person meetings (1)
- Virtual meetings (2)
- Telephonic meetings (3)
- Other (please state) (4) \_\_\_\_\_

How has your attendance at virtual board meetings compared to in person meeting attendance?

- I have attended more meetings. (1)
- I have attended the same number of meetings. (2)
- I have attended fewer meetings. (3)
- I have only attended virtual meetings. (4)

From where do you attend virtual board meetings?

- Home (1)
- Office (2)
- Both Home & Office (4)
- Other (please state) (3) \_\_\_\_\_

How often did you personally use virtual meeting platforms before Covid?

- Very frequently (1)
- Frequently (2)
- Occasionally (3)
- Rarely (4)
- Never (5)

What method does your board use for voting during virtual meetings?

- Poll/other electronic method (1)
- Raising Hands (virtual or real) (3)
- Voice (4)
- Other (please state) (5) \_\_\_\_\_

Describe your level of success in participating in virtual board meetings (0 = no success at all, 10 = very high success).

0    1    2    3    4    5    6    7    8    9    10

Describe your level of success in participating in in-person board meetings (0 = no success at all, 10 = very high success).

0    1    2    3    4    5    6    7    8    9    10

How prepared do you feel for virtual meetings vs in person board meetings?

- Much more prepared (1)
- More prepared (2)
- About the same (3)
- Less prepared (4)
- Much less prepared (5)

Please indicate how you feel about the following statements.

Board meetings are more efficient when held in a virtual environment.

- Strongly agree (1)
- Somewhat agree (2)
- Neither agree nor disagree (3)
- Somewhat disagree (4)



- Strongly disagree (5)

Board communication is improved in a virtual environment.

- Strongly agree (4)
- Somewhat agree (5)
- Neither agree nor disagree (6)
- Somewhat disagree (7)
- Strongly disagree (8)

Board governance is improved in a virtual environment.

- Strongly agree (1)
- Somewhat agree (2)
- Neither agree nor disagree (3)
- Somewhat disagree (4)
- Strongly disagree (5)

I am able to stay engaged...

	Always (1)	Mostly (2)	Sometimes (3)	Rarely (4)	Never (5)
In virtual board meetings (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In In-person board meetings (7)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The structure of my board's meetings have changed in a virtual environment.

- Completely (1)
- Significantly (2)
- Moderately (3)
- Very little (4)
- Not at all (5)

The following questions will give you an opportunity to tell more about your experiences.

How has your overall experience with virtual board meetings been?

- Very positive (1)
- Somewhat positive (2)
- Neither positive nor negative (3)
- Somewhat negative (4)
- Very negative (5)

How effective do you feel board meetings are...

	Extremely effective (1)	Very effective (2)	Moderately effective (3)	Slightly effective (4)	Not effective at all (5)
In a virtual environment (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In an in-person environment (7)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How effective have you found communication to be in virtual board meetings?

- Extremely effective (1)
- Very effective (2)
- Moderately effective (3)
- Slightly effective (4)
- Not effective at all (5)

How does communication effectiveness in virtual board meetings compare to communication at in person meetings?

- Much better (1)
- Somewhat better (2)
- About the same (3)
- Somewhat worse (4)
- Much worse (5)

How convenient have you found virtual board meetings?

- Very convenient (1)
- Somewhat convenient (2)
- About the same (3)
- Somewhat inconvenient (4)
- Very inconvenient (5)

How often have technology challenges affected your ability to participate in virtual board meetings?

- Never (1)
- Not often (2)
- Sometimes (3)
- Often (4)
- Much of the time (5)

How have you found the overall quality of decision making in virtual board meetings?

- Very good (1)
- Good (2)
- Satisfactory (3)
- Poor (4)
- Very poor (5)

How does the quality of decision making in virtual board meetings compare to in person board meetings?

- Much better (1)
- Somewhat better (2)
- About the same (3)
- Somewhat worse (4)
- Much worse (5)

How do you usually feel after a virtual board meeting? (5 point scale using smiley/frowny face)

big smile, medium smile, neutral, medium frown, big frown

How did you usually feel after an in-person board meeting? (5 point scale using smiley/frowny face)

big smile, medium smile, neutral, medium frown, big frown

Please let me know any comments, observations or suggestions that you have about the impact of the move from in-person to virtual board meetings.

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If you are interested in being interviewed for my research project, please put your name and email address below (e.g. Jane Smith, jsmith@nonprofit.org). All names will be kept confidential.

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## Appendix C: Capstone Survey Results

<b>Role (n=145)</b>	<b>Number</b>	<b>Percentage</b>
ED/CEO	92	63%
Board President	15	10%
Board member other than Board President	36	25%
Other*	2	1%

\* After confirming respondents' roles, 2 'Other' responses were re-coded to Board member other than President and 1 'Other' response was re-coded to Executive Director

<b>How many years have you served on this BOD or been ED/CEO?</b>	<b>ED/CEO (n=92)</b>		<b>Board Member (n=51)</b>	
	<b>#</b>	<b>Percentage</b>	<b>#</b>	<b>Percentage</b>
0-2	16	17%	19	37%
3-5	21	23%	16	31%
6-10	19	21%	15	29%
11-20	23	25%	1	2%
21+	13	14%	0	0

Respondents were given a text answer field and their raw answers were grouped in the categories above. Years that were not whole numbers were rounded down to the next whole number.

<b>How many years have you served on this BOD or been ED/CEO?</b>	<b>Board Member</b>	<b>ED/CEO</b>	<b>All</b>
<b>N</b>	50	94	144
<b>Mean</b>	4.1 years	10.4 years	8.2 years
<b>Median</b>	4 years	7 years	5 years
<b>Sd</b>	2.95	9.2	8.2

<b>How many people are on your BOD? (n=142)</b>	<b>Number</b>	<b>Percentage</b>	<b>Mean</b>	<b>Median</b>	<b>sd</b>
> 10	22	15%	22	16	19
10-19	71	50%			
20-40	29	20%			
41+	20	14%			

Respondents were given a text answer field and their raw answers were grouped in the categories above.

<b>How often does your BOD meet? (n=144)</b>	<b>Number</b>	<b>Percentage</b>
Monthly	79	55%
Quarterly	26	18%
5-6 times/yr*	24	17%
Other	15	10%

\* This category was not one of the choices in the survey. 24 of the respondents entered either 5 or 6 months/year in the 'other' category so I created a new category.

<b>What type of board meetings did your organization hold pre-Covid? Please choose all that apply</b>	<b>Number</b>	<b>Percentage</b>
In Person meetings	138	84%
Telephonic	19	12%
Virtual	6	4%
Other	1	1%

<b>How has your attendance at virtual board meetings compared to in person meeting attendance? (n=144)</b>	<b>Number</b>	<b>Percentage</b>
I have attended more meetings	30	21%
I have attended the same number of meetings	109	76%
I have attended fewer meetings	1	1%
I have only attended virtual meetings	4	3%

<b>From where do you attend virtual board meetings? (n=145)</b>	<b>Number</b>	<b>Percentage</b>
Home	74	51%
Office	22	15%
Both Home & Office	47	32%
Other (please state)	2	1%

<b>How often did you personally use virtual meeting platforms before Covid? (n=145)</b>	<b>Number</b>	<b>Percentage</b>
Very frequently	5	3%
Frequently	8	6%
Occasionally	27	19%
Rarely	57	39%
Never	48	33%

<b>What method does your board use for voting during virtual meetings? (n=144)</b>	<b>Number</b>	<b>Percentage</b>
Poll or other electronic method	16	11%
Raising hands (virtual or real)	45	31%
Voice	69	48%
Multiple methods	10	7%
Other (please state)	4	3%

<b>Describe your level of success in participating in board meetings (0 = no success at all, 10 = very high success).</b>	<b>Virtual (n=144)</b>	<b>In Person (n=143)</b>		
			<b>Virtual</b>	<b>In Person</b>
0	0	0	<b>Virtual</b>	
1	0	0	<b>Mean</b>	<b>sd</b>
2	0	2	8.88	1.38
3	0	1	<b>In Person</b>	
4	1	1	<b>Mean</b>	<b>sd</b>
5	5	6	8.5	1.86
6	4	7		
7	11	12		
8	25	28		
9	31	27		
10	67	59		



<b>How prepared do you feel for virtual meetings vs in person board meetings? (n=145)</b>	<b>Number</b>	<b>Mean</b>	<b>sd</b>
Much more prepared	8	2.79	0.61
More prepared	20		
About the same	112		
Less prepared	4		
Much less prepared	1		

<b>Board meetings are more efficient when held in a virtual environment. (n=145)</b>	<b>Number</b>	<b>Mean</b>	<b>sd</b>
Strongly agree	35	2.32	1.03
Somewhat Agree	52		
Neither agree nor disagree	38		
Somewhat Disagree	17		
Strongly disagree	3		

<b>Board communication is improved in a virtual environment. (n=145)</b>	<b>Number</b>	<b>Mean</b>	<b>sd</b>
Strongly agree	12	3.21	1.08
Somewhat Agree	22		
Neither agree nor disagree	49		
Somewhat Disagree	47		
Strongly disagree	15		

<b>Board governance is improved in a virtual environment. (n=145)</b>	<b>Number</b>	<b>Mean</b>	<b>sd</b>
Strongly agree	12	2.94	0.96
Somewhat Agree	28		
Neither agree nor disagree	69		
Somewhat Disagree	29		
Strongly disagree	7		

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<b>I am able to stay engaged...</b>	<b>Always</b>	<b>Mostly</b>	<b>Sometimes</b>	<b>Rarely/Never</b>
In virtual board meetings (n=143)	69	64	10	0
In in-person board meetings (n=143)	89	46	6	2

	<b>Mean</b>	<b>sd</b>
In a virtual environment	1.59	0.62
in an in-person environment	1.45	0.68

<b>The structure of my board's meetings has changed in a virtual environment. (n=144)</b>	<b>Number</b>	<b>Percentage</b>
Completely	6	4%
Significantly	14	10%
Moderately	42	29%
Very little	69	48%
Not at all	13	9%

<b>How has your overall experience with virtual board meetings been? (n=145)</b>	<b>Number</b>	<b>Mean</b>	<b>sd</b>
Very positive	69	1.71	0.83
Somewhat positive	56		
Neither positive nor negative	14		
Somewhat negative	5		
Very negative	1		

<b>How effective do you feel board meetings are...</b>	<b>Extremely effective</b>	<b>Very effective</b>	<b>Moderately Effective</b>	<b>Slightly effective</b>	<b>Not effective at all</b>
In a virtual environment (n=144)	33	72	33	6	0
in an in-person environment (n=143)	35	79	27	0	2

	<b>Mean</b>	<b>sd</b>
In a virtual environment	2.08	0.79
in an in-person environment	1.99	0.75

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<b>How effective have you found communication to be in virtual board meetings? (n=144)</b>	<b>Number</b>	<b>Mean</b>	<b>sd</b>
Extremely effective	17	2.4	0.81
Very effective	64		
Moderately effective	52		
Slightly effective	10		
Not effective at all	1		

<b>How does communication effectiveness in virtual board meetings compare to communication at in person meetings? (n=145)</b>	<b>Number</b>	<b>Mean</b>	<b>sd</b>
Much better	7	3.18	0.89
Somewhat better	21		
About the same	61		
Somewhat worse	51		
Much worse	5		

<b>How convenient have you found virtual board meetings? (n=144)</b>	<b>Number</b>
Very convenient	127
Somewhat convenient	12
About the same	5
Somewhat inconvenient	0
Very inconvenient	0

<b>How often have technology challenges affected your ability to participate in virtual board meetings? (n=144)</b>	<b>Number</b>
Never	62
Not often	60
Sometimes	19
Often	3
Much of the time	0

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<b>How have you found the overall quality of decision making in virtual board meetings? (n=145)</b>	<b>Number</b>	<b>Mean</b>	<b>sd</b>
Very good	52	1.92	0.84
Good	57		
Satisfactory	31		
Poor	5		
Very poor	0		

<b>How does the quality of decision making in virtual board meetings compare to in person board meetings? (n=144)</b>	<b>Number</b>	<b>Mean</b>	<b>sd</b>
Much better	5	3.05	0.68
Somewhat better	12		
About the same	102		
Somewhat worse	23		
Much worse	3		

<b>How do you usually feel after a virtual board meeting? (n=136)</b>	<b>Number</b>	<b>Mean</b>	<b>sd</b>
Big frown	1	3.93	0.93
Medium frown	15		
Neutral	14		
Medium smile	70		
Big smile	37		

<b>How do you usually feel after an in-person board meeting? (n=137)</b>	<b>Number</b>	<b>Mean</b>	<b>sd</b>
Big frown	1	4.26	0.75
Medium frown	2		
Neutral	13		
Medium smile	66		
Big smile	55		

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How do you usually feel after a meeting?	In Person Number	In-Person Percentage	Virtual Number	Virtual Percentage
Big frown	1	1%	1	1%
Medium frown	2	1%	15	11%
Neutral	13	9%	14	10%
Medium smile	66	48%	70	51%
Big smile	55	40%	37	27%

**Please let me know any comments, observations or suggestions that you have about the impact of the move from in-person to virtual board meetings.**

A significant part of the Board experience is the networking - we have a huge Board and there's a reason for that. In a virtual setting, while more people "tune in" for at least a little bit, that in-person component being gone is a real loss.
Allows people to attend that otherwise could not have attended
As an executive director one of my favorite parts of my job is connecting with leaders and members. I miss the in person connection, but do enjoy the flexibility and cost savings of virtual governance (and I'll miss the mute button too!)
As Exec Director, I'm finding board members find it easier to not show up on online and the interactions are more transactional not thought provoking. People seem zoom'd out and just want the meeting to be over.
As the executive director I have found I have to plan further ahead and think of the logistics in creating space for small and large group conversations. It is far more time consuming in my role to prepare for meetings and to communicate with the board when holding virtual meetings.
As the Executive Director, my participation is the same. My job to be there and pay attention. Attendance by board members is much better than our former in-person meetings, but their attention to the meetings is hard to judge.
Attendance by my Board virtually has increased and has remained consistent.
Attendance is way up, and those who would previously call in are much more engaged (and can hear much better) than when they were calling in to an otherwise in person meeting. It is somewhat easier to track who is talking and who is not, to allow the chair to say, "Jane, you haven't weighed in yet, what do you think? We end meetings more quickly, because of Zoom fatigue. This is generally a good thing. Also, staff doesn't have to stay later to clean up the food.....
Because it's more difficult to communicate during virtual board meetings, many people who would normally chime in during an in person meeting don't at the virtual meetings. Also, we've lost some of our "usual" people at the virtual meetings because they enjoy the camaraderie of the in person meetings that is just not available virtually. On the other hand, we've had some people engage who did not engage before - so it's a trade off.
Because of travel time, days with in person meetings, I would essentially end my work day by 3pm. Now I do them from my couch and don't have commuter fatigue

<p>Board members appreciate the virtual meetings but we do miss the in-person interaction that often takes place before the meeting and during breaks.</p> <p>But I suspect that virtual meeting will be a permanent fixture in the future and for some members who would have to travel long distances either by car or plane to get to a meeting will opt to attend virtually at future in-person meetings.</p>
<p>Convenience the most impactful difference. Our meetings are at night and it is nice to be home when it ends instead of driving from downtown at 8:30pm. I know others feel the same. Though, you lose the personal connection, chatting, interaction when it is virtual.</p>
<p>for me, being able to remain in my office means that the participation on the board impacts my work life less which I appreciate</p> <p>I can also attend meetings no matter where I am (for example, if I've been out of town, I can still check in)</p>
<p>How I feel after board meetings (virtual or in-person) is much more dependent on what transpired than if it was virtual or not. Virtual board meetings have been helpful in that it reduces time board members had to spend getting to meetings and has helped them stay focused. Before, since half the board flew in, they would be less focused since they knew they were in town til just before their flight. (Not sure those board members who were more local liked that).</p>
<p>I can now eat dinner and be home with kids whereas before I had to deal with childcare (or on one occasion bring the kids).</p>
<p>I feel tired after the virtual board meetings. After the in person meetings I feel upbeat - I get energy from the attendees.</p>
<p>I feel there is less debate about issues because conversations are one at a time - not debate-like. You also miss the side bars that help with decisions, bring other issues up, etc.</p>
<p>I find virtual Board Meetings as an avenue to accomplish minor tasks but it lacks the more in depth participation that you receive with in person meetings.</p>
<p>I have discovered I have some sort of ADD problem - it is hard for me to stay focused in virtual meetings. I can focus much better in person. I believe that conservative quiet people prefer virtual meetings and outgoing people prefer in person. I miss using all my senses during virtual meetings versus in person meetings.</p>
<p>I have noticed much greater and consistent participation by the Board since we moved to virtual meetings. We plan to continue a virtual option for our meetings even when we return to the D.C. Bar building.</p>
<p>I just prefer to be in person and have dinner with people. We also don't get to socialize much virtually.</p>
<p>I love working from home and LOVE virtual board meetings.</p>
<p>I officially joined the board in July 2020 during the pandemic. I have not met with this particular board in person, only virtually, so my answers reflect my virtual experience only.</p>

<p>I prefer in person meetings for discussion purposes and socialization, but prefer virtual meetings for convenience. Would be great to do a blend - alternating between the two every other meeting.</p>
<p>I think having in-person at least quarterly is important. Having virtual meetings inbetween is more effective then the past conference calls so this is a improvement. While I don't mind either in-person or virtual, board members have not overall been as collaborative as in-person.</p>
<p>I think making human connection is difficult virtually and that my new Board Members in particular are struggling a bit to "fit" in to the culture.</p>
<p>I think the Chair/president ability to lead Board and well thought out agenda impact quality of mtg more than whether it is in person or virtual</p>
<p>I think they are slightly more efficient. It is difficult to do a direct comparison because our officers rotate annually, so a different president runs the meetings each year. Accordingly, it isn't an apples-to-apples comparison.</p>
<p>I would say that the level of convenience in attending virtual board meetings is much better, but in person meetings are more fun.</p>
<p>In person is better - actual interaction with people, not with screens.</p>
<p>In person meetings are preferable. However, they work given the circumstances.</p>
<p>In-person meetings allow for the members of the board and guests of the board to socialize prior and post which can't be easily replicated in virtual meetings. The human contact among the group raises the energy levels of each individual. Ultimately it is about establishing trusted relationships and a bonus is friendships are generated as well which is harder to achieve in a virtual format.</p>
<p>It has been my experience that those who attend in person meetings are those who attend virtual meetings. It's a matter of discipline and scheduling.</p>
<p>It is about the same. We do not have in person events at all yet</p>
<p>It is difficult to develop personal relationships in a virtual environment, so I feel I do not really know the newest board members.</p>
<p>It is harder to read the experience and engagement of other board members in the virtual setting, and it's easy for members to interrupt each other unintentionally due to audio lag. I notice some members checking their phones, petting the cat, looking at other papers on their desk/table, etc. It is a great time-saver to meet virtually. It is not a great team-building environment, however. The social engagement with peers is a big part of a voluntary bar association and much harder to manifest in a virtual platform.</p>
<p>It is nice to virtually attend the meetings from home after a day of work. I enjoy not having to rush from one place to another to meet and the ease of being able to do it at home or on the road. I would like to keep it this way but also see the benefits of meeting in person from time to time as well.</p>

<p>It's the networking before and after board meetings that is sorely missed. Lots of great discussion and idea exchanges take place - resulting in projects and initiatives actually launching and getting done.</p>
<p>Missing the interpersonal relationships with my colleagues during virtual board meetings.</p>
<p>More folks joining in vs an issue making sure we had a quorum. So joining in on virtual is better but I don't think it is easier to communicate because only one person can join in to speak and others are muted. We are missing the ability to facilitate exchange.</p>
<p>More members attend virtual meetings. I assume it is the inherent ease of accessing meetings online.</p>
<p>More people are able to attend virtual board meetings. But, many are multi-tasking so are not fully present. Some turn off cameras and are non-responsive, so they aren't REALLY there. Virtual environment makes it difficult for participants to "read the room" and respond accordingly. Discussions take longer, more repetition of ideas (maybe because people are not paying full attention) and questions. Also, complaints that matters weren't covered, when they were covered; interestingly, the complainer was at the meeting, but probably not paying attention. It's just too easy to be "in the meeting" and doing something else at the same time. More difficult to control speakers and how long they present, cut them off, etc. Inability to read the room mentioned above comes into play here. Virtual meetings tend to take much longer even with good meeting management by Chair of the Board. Some who dominate the meeting, then escape and leave while business still needs to be done; it is just very easy to abandon the virtual meeting. Virtual meetings saved us during the pandemic, but I am a strong believer that in person meetings are best.</p>
<p>Moving to virtual didn't seem to change anything. Virtual has worked very well for us.</p>
<p>My board likes to have side conversations, but they cannot with virtual meetings. This keeps them more focused and helps the meetings move along faster. The downside is that some of them are paying less attention than they would in-person.</p>
<p>Not having to pay for and the time involved in travelling to an in-person meetings is a positive. But the Board is not as cohesive because they can't get together over a meal outside of the meetings to bond. Our combo of online meetings and in-person meetings every other month is a good way to do it, in my opinion. We can have some participate online even if most are in a room so no one needs to miss a meeting.</p>
<p>On occasion the need for face-to-face in-person meetings are needed for discussion on controversial or complex issues. Occasionally it is beneficial to be able to see body language and have a clearer focus on facial expressions for nuances.</p>
<p>Other experts have been able to easily and effortlessly join in the conversation to assist in making informed decisions for the organization</p>
<p>Our attendance is much greater, which is good for board/association knowledge. The dialogue is not as vigorous, but on the other hand the disruptive side bar conversations have stopped which is great.</p>



<p>Our board meetings always have activity reports from our managers and other departments. In-person meetings we would go through them during the meeting with little to no discussion or comment. Meetings typically lasted 3-4 hours. Virtual meetings we sent the reports a few days before the meeting to the board members. During the meeting we ask if there are any comments on the reports; if none we make a motion to accept. Most discussions during the meeting are financial and new business related. Much more in-depth and lively and relevant to new topics. Meetings have lasted about an hour.</p>
<p>Our board meets monthly at 8:15. We have members who reside and work at various locations in our two-county service area. Considering morning commutes, getting kids to school, etc. I hope these meetings remain virtual. It just easier for everyone to participate and use their time more efficiently.</p>
<p>Our Board met recently to discuss how we should meet next year (virtual vs. in person). We quickly came to consensus that we should have two virtual meetings, two in person meetings and one in person retreat. This was a great balance between efficiency, but also they like getting together primarily because they can get to know each other better as individuals. For example, in a virtual environment, you can't have 1-1 or small informal conversations with a few people while your drinking coffee or having lunch like you can in person.</p>
<p>Our in person board meetings were dinner meetings. There is something nice about sharing a meal together that cannot be duplicated in virtual meetings.</p>
<p>Please note that I am responding for one of CalCPA's 14 local chapter boards (in sort of an Executive Director role for that local chapter), not for the overall CalCPA's Board that governs the whole statewide association. The biggest advantage of going to a virtual format was that attendance increased. In addition, costs decreased (travel time, gas, snacks) which is a nice fact, too.</p>
<p>Prior to virtual we had the ability to call in and the technology was poor and reception bad getting 60-70% of the content and feeling completely left out of the meeting. The ability for us all to be in the same place for a meeting has increased and we've saved money in travel expenses. The loss in one on one and side conversations is pretty much gone though sometimes we have a quick exchange on line or with a call to fellow board members after the quarterly meeting. We have added a monthly call in to checkin without any decisions/votes being made- this just started two months ago.</p>
<p>Side bar conversations have disappeared resulting in improved attention and listening to the issue at hand. Attendance has increased partly due to the elimination of travel time and because meetings are more focused and shorter.</p>
<p>The biggest difference I have noted is that in our virtual meetings, there are no "side-bar" chats going on between people, which were distracting and also indicative that they were not paying attention to the current speaker. Our overall attendance at meetings has improved. I am also happy to not have the extra work of setting up and cleaning up the meeting space.</p>

<p>The Board Members are much more engaged in-person rather than virtual. Attendance is usually always 100% in-person, but for virtual it seems to be less. People are a lot less enthusiastic during virtual board meetings. I can tell they are doing other stuff during the meetings.</p>
<p>The interaction and discussion within a virtual meeting is less than in person. As attorneys, these board members read each other's body language and in a virtual setting, this ability is diminished.</p>
<p>To the extent that virtual attendance improved, the governance is improved. However, when a virtual meeting is over -- that's it. The in-person meetings, once adjourned, left room for lingering issues, burning questions, and general debriefing. There were always folks who stayed on a bit. Plus, relationship building -- post meeting small talk. That post-meeting informal meeting could leave me exhausted (I just want to go home!) but it was also a precious time to learn more, grapple with the different personalities, brainstorm, etc. As the new CEO -- that was important time to share my philosophy, values and leadership style, and lay the groundwork for a culture-shift.</p>
<p>Trade-off with advantages and disadvantages to both. Future should be mix</p>
<p>Virtual board meetings are faster and we can hammer through the agenda. On the downside, there is less cohesion of the board, people are less engaged and less likely to actually do anything after the meeting. There was more accountability with in-person meetings and people left with a better attitude after a fun happy hour.</p>
<p>Virtual board meetings are more efficient and relaxed.</p>
<p>Virtual board meetings have resulted in better overall participation as minor challenges (child care, etc.) do not prohibit participation by my board members as they would have for in-person meetings. I appreciate that I don't have to have paper documents printed so far in advance and can make changes to an electronic document or bring up and share a website or electronic document on the fly. I've also noticed greater participation by members of the association in a virtual environment that we had in person.</p>
<p>The main downside to the virtual environment is the lack of one-on-one interaction both between me and individual board members (before and after in person meetings) and between board members themselves. Since we had an election in the middle of COVID, I have some board members that have never met other board members in person.</p>
<p>Virtual board meetings in the time of COVID are great because we can meet safely and get rule changes approved, etc. We can't sit still and let proposed rule changes accumulate during the time of COVID, therefore, virtual meetings are an excellent way to achieve progress without endangering our decision-making body, "Council."</p>
<p>Virtual board meetings tend to allow chit chat more than in person ones, wasting quite a bit of time. Also, members drop off and leave meetings early quite often, making decision making problematic</p>
<p>Virtual has less prep. None of the logistics of getting people to a location. Catering. Etc. missed airplanes. Weather. You lose the casual conversations and bonding as well as generative conversations for strategic planning</p>

<p>Virtual meetings are a fraction of the time of face-to-face meetings so much less gets done in the virtual environment. Also, the opportunity for board members and staff to gather over meals is invaluable and missed very much. The lack of personal contact has an impact on overall effectiveness.</p>
<p>Virtual meetings are shorter and more focused, but I think the quality and depth of the conversations suffers. And it's unknown if people are really paying attention.</p>
<p>Virtual meetings tend to become a little bit more exhausting and after having other virtual meetings before Board meeting makes it worse. Now that all meetings are virtual, the amount of meetings we have a day has gone up.</p>
<p>Virtual vs. in person both have pros and cons. Virtual has allowed for improved attendance and time management as meetings now end on time. It has been cost effective too as the organization provided the noon meeting meals. However, in person meetings had more dialogue and directors contributed to discussions. Whereas, few speak up now in our virtual meetings. Additionally, virtual settings have created a less professional atmosphere as many are dressed very relaxed and their place of meeting can be distracting. Such as dogs barking, infants/toddlers requiring attention and others noticing one's personal and private space (bedroom/kitchen), lost internet connection, lighting and sound isn't also the greatest for some either.</p>
<p>Virtual Zoom meetings allow for the chat feature which is a benefit. Interactions can be harder when members leave their cameras off and it can be difficult to break in and join a conversation when you have to mute/un-mute.</p>
<p>We are a statewide organization. We will likely go back to in-person when it's safe, but make sure that our videoconference situation is better. We previously had just a call-in option.</p>
<p>We are seeing better attendance in virtual meetings. We're seeing board members we previously saw only once a year</p>
<p>We did 1 virtual meeting annually for many years so we were already set-up for it. What's missing in virtual only is the face-to-face communication which is easier in developing teams and cooperation.</p>
<p>We did not move from in-person to virtual board meetings. We have always maintained monthly or every-other-month board telephone meetings combined with 2 in-person meetings each year. We plan to resume in-person board meetings at the end of this year.</p>
<p>We had a mixture of virtual and in-person meetings pre-COVID (your question about this did not allow the "check all that apply" option. Our in-person board meetings typically were full day meetings, and this is what we have given up. The shorter meetings are effective, but sometimes we feel that we miss the extended time together both from a personal perspective (getting to know each other) and also to allow for more in-depth discussions.</p>
<p>We have board members from across the US and Europe. I find the virtual meeting format to be very productive and worthwhile for the majority of regular board meetings. They are an improvement over our former telephonic meetings. However, once we are able to return to F2F, we will again hold 1-2 F2F "retreat" type meetings again. The relationship building and dedicated time for strategic thinking is also important.</p>

<p>We have had more participation by board members with virtual meetings. Board Members may also join later in the meeting if they have a conflict that in person meetings doesn't allow.</p>
<p>We have seen more consistent and greater attendance in the virtual environment. Our average attendance has grown between 8 - 10%. It is important to have everyone have their camera on to ensure engagement.</p>
<p>We have struggled with the behavior of a small group of new board members who have never attended our in person meetings, particularly in terms of protocol, civility and focus. Onboarding new board members has been difficult because we have never met in person, and I find that they often place their personal agendas before the orgs. I have noticed that attention from even the most diligent board members tends to drift over time and often action items towards the end of the meeting are approved without significant debate. To improve focus, we have turned off the chat function and tried to rearrange our agendas. We take regularly scheduled breaks and have tried to encourage virtual team building with check-ins and social events. We have had extensive board governance training and have had to work hard to help board members understand how to apply their fiduciary duty in a digital environment, especially when it comes to issues such as social media postings. The upside is that service on our board is more accessible without the expense of travel. The downside is that we have lost the connection we developed through in-person meetings. Board members have less empathy for one another and are more likely to "act out" when they are not physically in the room with their colleagues.</p>
<p>We will likely transition to every other month virtual after the past year with alternating months in person. The online aspect meant we had almost 100% attendance at each meeting, and we were far more efficient.</p>
<p>When looking at it from a budgetary standpoint, the move from in-person to virtual is great, both for the organization and for the volunteer leadership. My board members are not reimbursed so attending in-person meetings is at their own expense, but the organization does cover F&amp;B, room rental ect. What I am noticing it an increase in meetings due to the convenience in Zoom, inefficiencies, poor communication, lack of participation, the list goes on. I work for an Association Management firm (AMC) and am the Executive Director for 3 organizations. I am noticing this with many clients.</p>
<p>You lose out on some of the side dialogue and conversation with other board members during breaks or off to the side to clarify certain agenda items or decisions. It's also hard to gauge other members' feelings or expressions when you cannot visualize them all together. Otherwise, we've communicated pretty effectively.</p>

### **Author's Bio**

Theresa Hurley is the Executive Director of the Contra Costa County Bar Association and a Certified Association Executive (CAE). She has spent 25+ years supporting nonprofits to carry out their missions more effectively working in both charitable and association nonprofits in the United States and New Zealand. Theresa has extensive experience in nonprofit leadership, strategic planning, and administering a Board of Directors. She has also served on the board of several organizations including Executives of California Lawyers Associations, Community Foundation for Eagle Peak and Creative Play Center. A self-proclaimed professional volunteer 'wrangler' with expertise in managing volunteers of all levels and professions, she is also successful at implementing and coordinating education, fundraising and social programs that support and inspire participants.