

**Examining the Many Aspects of Virtual Meetings:
15 Do's and 5 Don'ts of Virtual Meetings**

Do:

1. Do provide meeting notices within the required timeframes under the Davis-Stirling Act and the Corporations Code.
2. Do provide owners with all information needed to be able to attend an open session Board meeting or membership meeting electronically, on the meeting notice.
3. Do provide an option for owners to attend meetings by telephone instead of computer if they so prefer or don't have internet access.
4. Do choose a virtual meeting platform that will work for the association; while Zoom has been a popular meeting tool for all kinds of meetings, Cisco Webex, Google Meet, GoToMeeting, Join.Me, Skype, and other options exist.
5. Do purchase a premium version of the selected meeting platform that gives you more meeting options; consider trying the free version before buying to see if the platform is the right fit for the association.
6. Do run a test meeting before you invite everyone else, and take the time to understand the following functions:
 - a. How the presenter's role works
 - b. How to turn the camera and sound on and off
 - c. How to mute other participants
 - d. How to use the chat functionality
 - e. How to begin and end the meeting
 - f. How to share your screen
7. Do implement a system to ensure that only Board members, owners, and other authorized persons can access and attend virtual meetings:
 - a. Use security codes
 - b. Enable the waiting room (if there is one)
 - c. Call out unidentified participants
8. Do have the virtual meeting platform open for access 15 to 20 minutes before the meeting start time, to allow owners time to log in and get familiar with the platform.

9. Do close the rest of your tabs, or open what you're sharing in another window, if you are showing or sharing your screen; doing so prevents you from creating a liability or broadcasting confidential information by mistake.
10. Do have a roll call at the beginning of the meeting to record who is in attendance.
11. Do mute everyone except the Board members, yourself, and any others who may need to speak during the meeting (such as association legal counsel), and only unmute owners individually during open forum.
12. Do have the meeting chair state at the beginning of the meeting that recording of the meeting is not allowed (unless the Board allows recording of meeting, which is generally not recommended).
13. Do hold open forum at the beginning of the meeting, so that owners who don't want to be present for the entire meeting can log off.
14. Do stay on topic and keep the meeting moving.
15. Do ensure that a camera is set in a manner that allows owners to observe the inspector of elections count and tabulate ballots for Board elections and other votes in real time.

Don't:

1. Don't use your personal meeting ID to host public events (this is basically a continuous meeting, and anyone can interrupt your personal virtual space at any time); always choose a one-time meeting ID or automatically generate an ID, and require a meeting password.
2. Don't forget to provide necessary documents to the Board and others in advance of the meeting; screen sharing may be a good backup for information that is not confidential, private, or privileged.
3. Don't forget to set clear expectations with owners about the proper procedures for asking questions or sharing their opinions; whether meetings are held online or in person, there are still certain guidelines and etiquette that should be followed.
4. Don't forget to regularly check in with the association's legal counsel to keep abreast of any statutory changes or legal impacts relating to virtual meetings.
5. Don't assume virtual meetings will only be useful during the COVID-19 pandemic; associations may find that the option of virtual attendance in the future may increase communication and member participation, and you should plan on keeping the technology after in person meetings commence again.