Some thoughts for congregational, session, and other meetings on Zoom —after hosting our first-ever Zoom Presbytery meeting

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As more sessions and congregations consider electronic congregational meetings to elect officers and conduct other business while federal, state, and local ordinances or public health guidelines restrict the ability to meet in person in large groups, I've tried to gather here some of the things I've learned over the last few months of Zooming with groups of all sizes (including 700+ on Zoom for the General Assembly) and in hosting two electronic presbytery meetings with over 145 people registered to attend. Some important background and then technical tips.

Strictly speaking, electronic meetings are only proper when provided for in the bylaws. *That said, however,* few (if any!) of our churches, sessions, presbyteries, synods, or even the General Assembly anticipated a pandemic preventing in-person meetings when writing their bylaws. Consequently, **at all levels of the PC(USA), it is generally regarded as permissible to conduct business electronically in the PC(USA)—even in the absence of a formal rule in your church bylaws permitting it—due to the necessity that certain business must be accomplished even when large, in-person gatherings are either not permitted or unwise. *NOTE: If not already permitted by your bylaws, special rules for conducting meetings electronically should be adopted as the first item of business at the first electronic meeting.***

Out of an abundance of caution, several stated clerks and professional parliamentarians recommend that any actions taken be ratified at the first in-person meeting of the body after an electronic meeting that's held without a formal rule permitting such meetings. But, as one stated clerk of both a synod and a presbytery put it earlier this summer:

> I don't regard these Zoom meetings as provisional in the way that term is usually used. I think they are real meetings, with full force and effect, held under extraordinary and impossible to anticipate circumstances and faithful to the spirit of the bylaws that just didn't exactly name this circumstance. The ratification vote that will eventually come is an abundance of caution, in my view, but not what makes them legitimate.

An essential element of legitimacy of such meetings, however, is that any electronic meeting at the very least meet the minimum standards for meetings described in our constitution and for electronic meetings as described in the new 12th edition of *Robert's Rules of Order Newly Revised* (RONR). First, the Constitution of the PC(USA) says:

> *G-3.0105 Meetings*
>   Meetings of councils shall be opened and closed with prayer. Meetings shall be conducted in accordance with the most recent edition of *Robert's Rules of Order Newly Revised*, except when it is in contradiction to this Constitution. Councils may also make use of processes of discernment in their deliberations prior to a vote as agreed upon by the body.
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> **Note:** *Although a congregation is not a "council," the General Assembly has said that RONR or something similar should be specified in the bylaws and used for congregational meetings, and*

most of our churches have done so. If they have not, I strongly suggest that RONR be used in the absence of any other guidance—and that all congregational meetings be opened and closed with prayer no matter what!

As it says in the new 12th edition of *Robert's Rules of Order Newly Revised*, (which, by the way, is now the authority as described in G-3.0105) though this particular provision is unchanged from §9 in the now-obsolete 11th Edition):

> A group that holds such alternative meetings does not lose its character as a deliberative assembly . . . **so long as the meetings provide, at a minimum, conditions of opportunity for simultaneous aural communication among all participating members equivalent to those of meetings held in one room or area.** (RONR, 12th ed. 9:31, emphasis added)

"Simultaneous aural communication" means that everyone participating must be able to hear -- and be heard by -- all others participating. *Having one person on a computer reading or passing along questions or comments on behalf of others viewing remotely by Zoom, Facebook Live, YouTube, or other means of viewing the meeting does NOT provide an opportunity for simultaneous aural communication.* Provisions can also be made to provide for translations for the deaf if needed to meet this requirement.

- In our presbytery meeting, part of preserving the opportunity for simultaneous aural communications was setting the meeting permissions in Zoom to allow any participant to unmute themselves at any time even though we asked them to seek recognition before speaking. There are occasionally times when it is appropriate (to raise certain points of order, for example) to interrupt a speaker, and we made that possible.

The next step after setting conditions to meet that minimum standard of simultaneous aural communication is to adopt special rules for electronic meetings to be used until a regular meeting can be held to formally amend the bylaws to permit such meetings in the future.

- The *Special Rules of Order and Standing Rules for Electronic Meetings of the Presbytery of Tampa Bay* adopted at the Presbytery meeting in August offer a model that can be adapted for use by a congregation or session. Smaller congregations and sessions may be comfortable with everyone remaining unmuted and doing voice votes or raising their actual hands for all to see just as if they were in the same room—but they may still want to adopt rules like these for when a more formality is needed.

- For most people, once a Zoom meeting passes 25 total participants it pushes additional participants to another screen (I know that some computers will display up to 49 at a time, but the individual video images start to get pretty small on standard monitor screens when that happens!). With as many as 150 participants at some points during the presbytery meeting in August, that meant participants were spread across 3-6 different screens—and rules governing participation in a meeting spread across more than just one screen become more important.

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***So, you're hosting a meeting with more than 25 participants
and want to know how to make it work?***

With gratitude to those who went before us in hosting meetings of presbyteries, synods, and the 224th General Assembly this summer, here are some practical Zoom tips on features I changed or took advantage of in hosting the presbytery meeting and may be helpful to you.

The first thing I did for the presbytery meeting was to turn on Zoom's "nonverbal feedback" feature to add this panel to the bottom of the participants' list to use in raising a "Zoom hand" when seeking recognition to speak and voting "yes" or "no" on various items (we ignored the coffee break choice since everyone was on their own for that ☺). You can read all about the nonverbal feedback feature and how to enable it at https://support.zoom.us/hc/en-us/articles/115001286183-Nonverbal-feedback-during-meetings, but here's what it looks like:
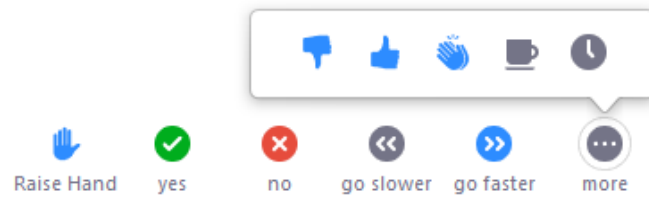
- Anyone clicking on the "Raise hand" button will jump to the top of the participants list in the order in which they raised their hands, and that makes it easier for the moderator to call on people.
- Anyone clicking on the green "check" (☑) button for "yes" or the red "x" (☒) button for "no" will show that symbol next to their name and the host and co-hosts will see a tally on their screen of the totals for each (more on that below).

In order to help preserve the integrity of the meeting and any voting, we required everyone to register ahead of time in Zoom for the meeting and individually approved their registrations after verifying their role in the meeting on our roll of commissioners for the meeting. The confirmation email included a unique-to-them Zoom link and connection info along with some other reminders about the meeting.
- Read about how to set up online registration in Zoom at https://support.zoom.us/hc/en-us/articles/211579443-Setting-up-registration-for-a-meeting

We also required everyone with *voice but not vote* in the meeting to change their display name in Zoom to start with "Z-" so they would go to the bottom of the participants list in Zoom (except when they clicked on "raise hand"). This keeps them grouped together on the list, and also lets everyone see if a non-voting attendee votes inadvertently when voting members are asked to vote.
- This could be useful in churches with regular attenders or participants who are not officially active members but who might otherwise be welcome to attend a congregational meeting and perhaps be given the privilege to speak when appropriate.

No matter how you choose to vote, in any larger meeting (more than 25 on screen), it's important that people participate as one person/one device/one vote and not two people sharing a computer or device for voting. In one congregational meeting I supported, a couple sitting together at home for the

meeting used a computer for sound and video and for one of the two people to vote, and the other member of the couple used a Fire Tablet to connect to the meeting for voting (but with the camera off and mic and sound muted to avoid feedback).

At the start of the presbytery meeting, I also made sure that the moderator and a couple of other people were made co-hosts in Zoom. This is a vitally important step for a several reasons. ***Most importantly, this step ensures that the meeting can continue if the host's internet connection goes down.*** If there is only one host, and that host's connection is interrupted, Zoom may end the meeting for all participants. For info on enabling and adding a co-host, visit https://support.zoom.us/hc/en-us/articles/206330935-Enabling-and-adding-a-co-host

- This also permitted the moderator and a couple of other people so see what I could see during the meeting, and one or two others could take care of some other chores. Among "other chores" handled by others:

    o **Take attendance.** To help someone else take attendance, I generated and downloaded a registration report in Zoom (details at https://support.zoom.us/hc/en-us/articles/216378603-Generating-Meeting-Reports-for-Registration-and-Polling). Once I had that, I was able to open the spreadsheet and sort it into alphabetized list of who had registered and asked two people to mark off names they saw on the participant list. For a congregational meeting, a printout of the church roll could be used. Of course, this requires people to change their display name to show their real name (see below)

    o **Rename people to at least show first and last name correctly as their display name in Zoom.** ***This is vital to making it easier for the moderator to call on people in the participant's list and for taking attendance.*** Despite repeated efforts before the meeting, not everybody changed their display names from "Chromebook_0116" or "dad's phone" to their real names—but most did. One co-host used the registration list, their knowledge of who's who, and whatever else worked to update the few who didn't or who tried but didn't finish (e.g. first name but no last name). For more on renaming, visit https://support.zoom.us/hc/en-us/articles/200941109-Attendee-controls-in-a-meeting and scroll down to "Rename" on that page.

    o **Reach out to people who raise their hands when someone else was talking.** One person would send a private chat message if someone raised their hand at an odd time when no one was expected to raise their hand to find out what was up so they could tell the moderator.

I also turned off public and private chat for everyone but the host and co-hosts. This let participants send notes only to me as host—but I and the other co-hosts could use it to communicate with each other or with any individual. It also prevented anyone other than the host from using Zoom's chat feature to pass a note to the entire meeting without being recognized by the moderator to speak *OR to inadvertently send a text to the whole meeting when intending to pass a private note to one other person!* See https://support.zoom.us/hc/en-us/articles/115004809306-Controlling-and-disabling-in-meeting-chat for more on how to change the chat settings.

During the meeting, the moderator of the presbytery kept the participant panel open on his Zoom screen, which meant the moderator could:

- see immediately if anyone raised their Zoom hands so he could call on them since anyone hitting the "Raise hand" button in Zoom will jump to the top of the list in the order in which they raised their hands.

- see at a glance the tally of yes or no votes. The example here only shows one vote, but you get the idea:

Important: If you attempt a large meeting as a hybrid with some participating remotely and some in the room with the moderator (which I do NOT recommend without a lot more preparation):

- Someone other than the moderator has to be designated to also pay attention to the participants list in Zoom in order to point out to the moderator when someone might be missed on Zoom if the moderator is distracted by people in the room.
- Someone must also be responsible for ensuring that votes in Zoom and votes in the room are combined BEFORE the moderator announces the results of a vote.

We did not use Zoom's polling feature for any votes at the presbytery meeting, but it can be used for secret ballots by setting up a poll ahead of time and choosing to make it an anonymous poll question. You can read about how to do that at https://support.zoom.us/hc/en-us/articles/213756303-Polling-for-meetings.

By the way, we will be using the polling feature at future online presbytery meetings to help us take attendance. When combined with registering in advance via Zoom, the polling feature records who answers a poll based on their registration and use of their unique Zoom link (unless changed to anonymous polling) and can generate a poll report during the meeting to confirm attendance. The content of the question doesn't matter to the report of attendance, only that they participate in it (and again, with one person/one device/one vote).

Since the presbytery meeting had over 150 people register, I had to purchase a "large meeting add-on" license to permit more than 100 people to participate. Zoom's default limit is 100, but you can purchase options for up to 500 or up to 1000. Directions on how to purchase that are at this link: https://support.zoom.us/hc/en-us/articles/201362823-Hosting-Large-Meetings.

- **Zoom has recently changed billing for the "large meeting add-on" on month-to-month accounts** to now permit it to be purchased for a month (or one-time use) for $50 without automatically being renewed unless canceled. *NOTE: IF YOU HAVE AN ANNUAL ZOOM PLAN, that may be different for you; be sure to check carefully before purchasing and contact Zoom with any questions.*

- **IMPORTANT**: purchasing the license makes it *available* for use, but it won't be usable unless the license is assigned to a user on the Zoom account who will serve as the host for the electronic meeting. Be sure to follow the directions at the link above on "Assigning large meeting licenses to users" to make sure it's properly assigned to the right meeting host for use.

Finally, take another look at the documents we sent out ahead of the presbytery meeting with our special rules for electronic meetings and additional helps for using Zoom (they're all available at https://presbyteryoftampabay.com/orientation)**.** Any church in the Presbytery of Tampa Bay is free to tailor them as needed to fit your setting (send me a note if you'd like to get them in an editable format). They're not perfect, but they're a good start in setting the ground rules for a large meeting on Zoom.

Blessings,

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