Your guide to holding an online AGM

Thinking of having your club Annual General Meeting (AGM) online? Our team has compiled a guide with some tips to help clubs host a successful online AGM.

The legal bit

Read more about the legal and constitutional issues around holding your club AGM online during COVID from Harper McLeod on the sportscotland clubs hub.

Choosing a platform

It's important to find a platform that works for you, and that you and your team are comfortable with. For the Mountaineering Scotland AGM we chose to use Zoom as we already had an account and were familiar with the platform, although we still had to research which add-ons to use to allow all the functionality we needed. Other platforms you may wish to investigate include:

- GoToWebinar
- MS Teams
- Live Webinar
- Facebook rooms

Some platforms provide free basic accounts, but it's worth researching what features are available and whether a free account will allow access to all the functionality you need.

Webinar or meeting?

A common question is whether you should host your AGM in a meeting format versus a traditional webinar format. The two main differences between the two formats are polling and attendee visibility and participation.

In a webinar format the host has the option to mute all participants or allow a participant to speak, and usually only the presenter and/or speakers are visible. Most webinar platforms have built in polling

functions that you can use to complete your voting, and questions can be submitted via a Q&A or chat function.

If you want more interaction, or all attendees to be visible, ask questions and share screens, then a less formal 'meeting' style will be more appropriate. Polling functionality is not available on most platforms and participants must control the mute/unmute function for themselves to ask questions and join a discussion.

Although having active participation is a benefit, it is worth noting that not all attendees will remember to mute themselves or know how to use the function, therefore some guidance on this may be necessary at the start of the meeting. If you have a large AGM, this might cause delays, background noise, and distractions, however the meeting organiser should still have the ability to mute participants. For smaller meetings this may not be such an important issue and will allow a more engagement.

View a comparison of meeting and webinar benefits for [Gotomeeting](#) and [Zoom](#).

Useful roles

The following is a guide to some useful roles to support your online AGM, but don't feel you need all of them if not applicable.

- **Registration and reminders:** Some platforms have their own registration forms, track attendees and send reminder and post-event emails. Alternatively, you could use a simple event booking system like [EventBrite](#) or email details of the meeting directly to members. It's worth sending a reminder the day before so it's easy for them to find the link to join the meeting and any additional information that may be useful for them.
- **Presenter:** Limiting the number of speakers/presenters helps to keep things simple, so it is best to stick to one or two main presenters to introduce and run the meeting.
- **Slide advancer:** If you're sharing one or more presentations, it is worth considering having one person to advance the slides rather than just the presenter, so there is less for them to think about.
- **Voting/poll manager:** The person in this role is responsible for setting up and launching polls (if using) and sharing the results when the poll has closed.
- **Chat and motion manager:** The person in this role will monitor the chat function and alert the presenter to any relevant questions, motions or other issues at the relevant time, or respond to ad hoc questions. If you are using chat to record attendees or polls, the person in this role should also record the results.
- **Technical support:** Having a separate volunteer for tech support means the presenter/speaker can focus on the meeting itself. Their role is to facilitate the smooth running of the IT and answer any

questions from attendees on technical matters via chat/questions function and email/phone (if this is an option).

Additional functionality

The following are some of the most common functions required for an AGM.

Tracking attendance

If the platform you are using does not allow for attendance tracking, you might consider asking all attendees to record their full name in the chat function and then either save the chat history or have a volunteer to assist with going through the chat and logging attendees during the meeting.

Tip: Saving the chat history should be set up before the webinar through the Zoom account settings.

Dealing with questions

A question or Q&A "channel" is a great way to respond to questions and track them throughout the meeting. You can respond to attendees directly by message, or if you believe the question is helpful for everyone in the meeting, you can have the speaker respond to the question during their presentation. Alternatively, if holding a meeting rather than a webinar, you can ask people to raise their (virtual or actual) hand and wait to ask their question verbally. Always remember to ask them to mute themselves again afterwards.

Voting

There are several approaches to voting:

- Ask members to vote in advance either using voting papers (mail/email) or using a third party voting or survey platform such as Election buddy, SimpleSurvey, SurveyMonkey or JotForm.
- Vote on the day using the polling or chat function of your chosen platform
- A combination of the above!

Using a polling function

The polling function of webinar platforms allows users to create a question with multiple answers for attendees to choose from. Once a poll is launched, attendees can vote on one answer. The organizer is able to see the percentage of votes per answer and the percentage of attendees who have completed the poll. This helps to see participation and once the poll closes, webinar organisers have the option to share the results of the poll (individual responses remain confidential).

By inserting the motion you want to pass in the question area of a poll and setting the appropriate answers, you can use the polling function for passing motions.

There are a few things to remember:

- To start collecting responses for a poll, you need to click the button to share the poll. Once you have shared the poll, you cannot normally launch it again (This includes during practice mode).
- The total character count on poll questions and answers is low for many platforms. Prepare exact questions prior to your AGM and add them ahead of time to avoid last minute troubles. You don't want to be editing "on the fly" as speakers and participants are waiting.

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Using chat for votes and motions

The chat function could also be used to record motions and polls. Using the chat function for motions as opposed to having members speak minimizes the chances of audio challenges, members speaking over each other, and ensures a record of voting. The presenter or speaker can introduce a motion or poll verbally and/or onscreen to which members type Yes/ No for votes and "first" or "second" for motions in the chat box to indicate their support. This is also useful for voting if some members are unable to access the polling function (for example they are accessing Zoom in a browser, not the app) but is probably not the best option for voting if you have quite a number of members.

Top tips:

- Practise, practise, practise – it really is worth having at least one dry run through your AGM to ensure everything works the way you think it should, and so that everyone involved is comfortable with the IT and running order.
- Provide attendees with important information in advance, for example how the AGM will run, what the differences will be to an in-person AGM, how to vote, how to join the meeting and any computer requirements (eg software downloads – definitely best to do in advance). An example of the information sent in advance to attendees of the Mountaineering Scotland AGM is available here (link).
- Log in and check everything is working at least 45-60 mins before the start of the meeting. This allows you to check audio and video for the presenters and screen sharing (if using).
- Give an overview of the functions that attendees will use to vote, chat, mute/unmute, raising hands etc at the start of the meeting.

- If you are recording the AGM, make members aware of this and why you are doing it (eg for minutes or to share online).
- If inviting questions from members, think about when you will answer these – ad hoc, after specific agenda items or at the end of the meeting? It might also be useful to limit the time spent answering questions to keep to your time schedule.
- Keep your AGM as concise as possible and include a break if you think it will take longer than 60-90 minutes.
- If using slides, keep them clean and simple with larger text than you would normally use if presenting on a big screen – small text will be difficult to read if people are using tablet or mobile devices.
- Consider asking participants to complete a short post-AGM survey to find out what participants thought of the platform, ease of use, voting etc.

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