

Let's Meet; Virtually, That Is

ASSOCIATIONS NOW - VOLUNTEER LEADERSHIP ISSUE, January 2010

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The American Dietetic Association's House of Delegates (HOD) had always met face to face twice each year. Beginning in 2003, there was talk of meeting virtually, in an online-only space. Nothing ultimately came of these discussions, however, as people questioned if it was really in the best interest of the participants. But in late summer 2008, there was more reason to consider doing so: Like many other associations, the ADA Board of Directors and our Finance & Audit Committee were concerned about the organization's financial status in the face of changing market conditions. As a result, several ADA organizational units decided to reduce spending by not meeting in person during the remaining program year.

In late October 2008, the HOD Leadership Team (HLT) followed suit, agreeing that the spring 2009 HOD meeting could be conducted virtually. This was a huge undertaking for us, from planning and technology to training and execution, and the decision was not taken lightly. Here's a closer look at our process and the lessons we learned from conducting our first virtual HOD meeting.

Breaking the News

The HOD, which governs the profession of dietetics and sets policy on major issues, is made up of 100 appointed and elected individuals, including six members who comprise the HLT. Once the HLT agreed that the spring meeting could be held virtually, HOD Speaker Marsha Schofield explained the plan to the entire HOD team. As expected, the reaction was mixed. One group of HOD members was in support of a virtual meeting as a means to be financially responsible as well an opportunity to minimize time away from jobs and families and to embrace technology. However, another group of delegates was opposed to such a plan, citing concerns that discussions would not be as rich without face-to-face interactions and that networking opportunities would be lost.

A segment of the latter group went to the leadership team with a document signed by 20 other delegates asking that the virtual meeting be reconsidered. The leadership team listened but ultimately decided to move forward, knowing that we had more than six months to put together what we hoped would be a worthwhile virtual meeting. Soon after, the board approved the restructuring of the HOD meeting, along with two other meetings, to reduce expenses. HOD members then received a letter from Speaker Schofield in November 2008 informing them of the final decision, along with the rationale and plans for proceeding.

This time, the reaction was more positive: Delegates not only showed a desire to support the organization's financial plan but also a willingness to try conducting business in a virtual world. Now it was up to us to deliver a program that lived up to the participants' expectations.

Choosing the Right Virtual Meeting Format

Some delegates were already skeptical about participating in a virtual meeting, so we knew we needed to use a format in which they would feel as comfortable as possible. We also went into this looking at it as an experiment that we might not get 100 percent right the first time. This took some pressure off, but we still wanted to have a successful meeting. One of the first steps we took was to survey all delegates to get feedback on what technology tools they were comfortable with and what technologies they were aware of and used, such as MySpace and Facebook. We also asked them for suggestions on how they thought we could hold this meeting most effectively, what their expectations and personal technology barriers were, and the best days and times for them to participate in this virtual meeting. We discovered that members want to keep their professional and personal lives separate and that they wanted the technology to be as simple as possible. We were right on point with them about the simple part. From our standpoint, we didn't want to reinvent the wheel or spend a lot of money. (And, on the topic of money, it's important to note that we had to terminate the contract with the hotel we had originally booked to host the meeting.)

Besides technology, another concern of ours was how to design and organize this virtual meeting so that it did what our face-to-face meetings had done in the past: move more than 100 consensus-driven delegates forward on various topics. In December 2008, HLT identified two mega-issues for the two virtual dialogue sessions: prevention of childhood obesity and Dietetic Practice Group representation in the HOD. DPGs are

professional-interest groups of ADA members who work in a specific area of dietetics practice. Both topics were significant to members and would provide a good foundation to build our first totally virtual meeting.

In January 2009, HLT started to develop design plans for the two virtual dialogue topics. Significant attention was given to structuring each section of the dialogue, which included identifying key questions for the group to consider, the time available for the discussion, and the key outcomes to move the discussion to the next level. This well-thought-out group process prepared the HLT to make logical changes, when needed, in real time. The HLT members also agreed that they would convene in Chicago at ADA Headquarters to facilitate the virtual meeting. Dates for the dialogue sessions were set immediately before the ADA Board of Directors' meeting (which HLT members attend) to minimize additional expenses.

In addition, we selected the technology we would utilize. We decided to use three different technologies: the chat feature that already existed in our HOD Community of Interest online community, GoToWebinar, and conference calls. Once we chose the technology, we knew that it was necessary to have technology training sessions for both our delegates and those who would be serving as our virtual table facilitators. In the months that followed, we told the rest of our membership about our plans and finalized our schedule and agenda for the meeting and the advance trainings. We also put together three tip sheets for delegates.

In March 2009, training got started with a conference call with the HOD Mentoring Program's mentors and mentees. The purpose of the call was to provide new delegates (mentees) with an opportunity to discuss their concerns and questions related to participating in a virtual meeting. A series of tips was provided with the intent to increase new delegates' confidence in participating in a virtual meeting. The next month, 10 delegate technology training sessions were conducted (each session included 10 delegates and one or two staff). All 98 delegates completed this required training. Delegates who experienced more technology issues or had greater learning needs received additional one-on-one assistance. In late April, 20 delegates were trained by members of the HLT to serve as table facilitators for the virtual dialogue sessions.

Conducting the Meeting Virtually

For a bit of a warm-up, we tested the virtual waters a few times before the spring HOD meeting. On April 22, the first virtual Association Update was conducted via webinar, which included brief reports from the ADA President, ADA Treasurer, and HOD Speaker. The second Association Update was conducted on April 24 and included briefings from the CEO, ADA Foundation chair, and a report from the Professional Issues Delegates/Dietetic Practice Group Family Structure Resources Workgroup. These sessions were attended by 50 to 60 members of HOD and gave them a bit of a preview of what to expect.

On May 1, HLT and related ADA staff convened to conduct two mock dialogue sessions at ADA headquarters in preparation for the virtual dialogues taking place the following two days.

Sooner than we knew, it was May 2. For about four hours each day, HOD convened virtually and conducted two dialogue sessions, utilizing a combination of large-group webinars and small-group chat rooms (virtual tables of 10) with 98 delegates participating. This was a historic first for the association.

To kick off the meeting, HOD Speaker Schofield made her remarks: "All in all, we've had our frustrations and our laughs, and we are now at a point where we're able to do what was considered to be impossible. Thank you for keeping a sense of humor and for your willingness to explore our version of the Magic Kingdom. For all of us who have experienced Walt Disney's dreams come true, we know that they are best enjoyed in the company of family and friends. I can definitely say that for me much of the joy of this adventure has come from sharing it together with you. So, congratulations, we made it to this point. So let's see what more we can do."

Handling What Gets Thrown Your Way

Whether a meeting is face to face or virtual, it's rare to not run into any problems. Lucky for us, no difficulty was too major. The dialogue session on the first day had some minor problems related to receiving feedback from the virtual tables, which required more time than originally allotted. However, the HLT and staff made quick decisions on how to delay the reconvening of the large group and how to consolidate the data from the virtual tables. In addition, a polling exercise had to be redesigned due to an unforeseen issue with the size of data being presented. Again, a

quick decision was made. In the end, the dialogue session exceeded the timeframe by 30 minutes, but the glitch did not diminish the outcomes of the virtual discussions.

The following day, the dialogue session was conducted without incident. In addition, delegates were able to witness the transfer of gavels from the speaker to speaker-elect and the president to president-elect via online streaming video. This was another first for ADA, as our transfer of leadership had always been witnessed by HOD during a face-to-face meeting.

Evaluating and Moving Forward Virtually

After the meeting, attendees were asked to evaluate it and to also include feedback on the delegate training and table-facilitator training sessions. Fifty-four of the 60 delegates who responded consistently rated each of the virtual sessions with either a four (agree that objective was met) or a five (strongly agree that objective was met).

Overall, the HOD meeting evaluation results were positive, and we consider the virtual meeting format a success. A variety of challenges and potential solutions have been discussed by the HLT and will be considered for future application. We have launched a new website, and we hope this will help alleviate some problems. A technology and communications session was conducted during the fall 2009 HOD face-to-face meeting in Denver to further prepare for a virtual meeting in spring 2010. Delegates were notified in early October of the decision to continue with a virtual meeting format for spring 2010. In addition, the decision was presented during the opening session of the (face-to-face) fall 2009 HOD Meeting.

To prepare for the spring 2010 meeting's virtual format, the fall meeting featured a session on technology and communication designed to focus on developing social-networking skills and to create opportunities for delegates who would be assigned to virtual tables together for the spring 2010 meeting. This session was well received and should be instrumental to ensuring a successful meeting in May 2010. Members were able to develop relationships face to face first. Some even took photos of each other on their cell phones so they could see each other when they are meeting virtually next spring.

ADA has found that conducting business virtually is not only doable but desirable for some members of the House of Delegates. Some of our strongest naysayers in the beginning came to us afterward and said how much they enjoyed the virtual environment. Even better: We managed to save the organization \$75,000. Our delegates' and staff's sense of adventure proved successful, and we know our future virtual meetings will only get better.

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Sidebar: Lessons Learned

If you're interested in holding a virtual meeting of your own, here are a few things to consider before diving in, according to Harold J. Holler of the American Dietetic Association:

Allow for plenty of time and preparation. "A good six to eight months is best," says Holler. "I can't imagine getting it all done in anything less. And make sure you have enough time for training."

Make sure you have IT support. "Things happen. You want to make sure you have the right people to find solutions to the problems and to keep your members from getting frustrated."

Be realistic. "Not all things are going to work out as planned. You may have to abandon and go with a different system. Be open to that."

Keep people engaged. "We had a creative staff who was willing to step it up. If they weren't engaged and excited, it would have never worked out like it did."

Know your participants. "If your members aren't tech savvy, don't use a tool that requires them to be so. Keep it simple; it will pay off in the end."

—As told to Samantha Whitehorne, managing editor, Associations Now. Email: swhitehorne@asaecenter.org