



ACCOUNTABLE NOW

A GUIDE TO CREATING ACCOUNTABLE VIRTUAL ANNUAL MEETINGS

Transforming to Virtual Meetings

For membership organisations, or organisations that build partnerships across the civil society sector, annual meetings or Annual General Meetings (AGMs) are a core event for the calendar. For Accountable Now, our AGM gives us the opportunity to be accountable and transparent and practice an important aspect of dynamic accountability: stakeholder engagement. By bringing awareness to important organisational updates, transparently discussing systems, structures and policies, AGMs serve to improve and strengthen the relationships between an organisation and build trust between stakeholders.

With COVID-19 causing disruption all over the world, organisations have taken their activities online, carrying out events, meetings and general work virtually. In the past year, many organisations have also organised their in-person annual meetings online, and Accountable Now was no exception. In carrying out a virtual AGM, we saw many advantages: we were able to host more members, reduce our carbon footprint and retain the networking aspect - just to name a few.

For many, virtual events will be here to stay. We have put together this case study with the aim to provide information and good practices on how to create effective, transparent and accountable digital annual meetings. With relevant advice and practical examples from Accountable Now's members and partners, we hope that this case study will be useful for other organisations who are looking to carry out their AGMs or annual meetings virtually in an accountable, accessible and inclusive way.

Part 1: Creating accountable Annual General Meetings

Part 2: Building relationships through digital networking

Part 3: Inclusion & accessibility

Creating Accountable Annual General Meetings



Let's break down what a virtual AGM is. The idea is simple. It's just like a face-to-face meeting: we're still carrying out practical actions like voting on pertinent matters, adoption of financial and annual reports, confirming new trustees, appointing auditors, and providing members with a space to connect. We just do this through a video-conferencing application.

Keep in mind these guiding principles to ensure a successful virtual AGM:

- People are the centre of any event, virtual or not. Ensure your virtual AGM is designed with purpose and benefits not only your organisation but the people you invite too.
- Virtual events give organisations the opportunity to invite more than just their 'usual suspects'. Use your virtual AGM as an opportunity to introduce new people to your organisation, to learn from new participants, and new perspectives.
- Just because it is virtual does not mean that the organisation of the event becomes easier. Just as much time and resources are needed to craft a successful virtual event.
- AGMs are a chance to reflect. Move beyond a 'tick-box' approach and create meaningful sessions that give added-value to participants.

Virtual Annual General Meeting Good Practices

- For some authorities/countries, digital AGMs may not be permissible. Double-check with your national CSO registration body to see if governing documents allow for virtual AGMs or if they need to be amended to fit this new context.
- A virtual AGM should only take place if the appropriate quorum can be met.
- Depending on your organisation's memorandum or articles of association, you may have to share the report and other important documents a certain amount of time ahead of the AGM. We suggest setting up a shared and secure drive to ensure that all information/important documents are centralised and easy to access for trustees and members. Alternatively, an email to share all documents with related parties would suffice.
- For voting and confirmation, many virtual meeting platforms have polling features. Other more secure voting platforms can also be used in online settings.
- Always ensure participants have enough time to motion new amendments.

Building Relationships Through Digital Networking

In-person AGM's provide a perfect opportunity for your organisation to meet and interact with staff, Board members, members and key stakeholders. Because your AGM takes place virtually does not mean that you have to sacrifice the chance to catch-up, interact and have those important informal conversations that help build relationships and maintain connection.

Digital Networking Good Practices

- It is important to acknowledge that virtual networking sessions will not be able to fully replace in-person networking. Plan ahead and curate an intentional session that provides insight and purpose for participants.
- If you are managing a virtual event with many participants, explore various event management and networking tools available.
- Help participants feel comfortable and at ease, and break down the digital barrier. Find the fun in networking through icebreaker activities and help people connect through shared commonalities. We have found that a guiding question or a general topic works well to spark conversations.

Inclusion & Accessibility

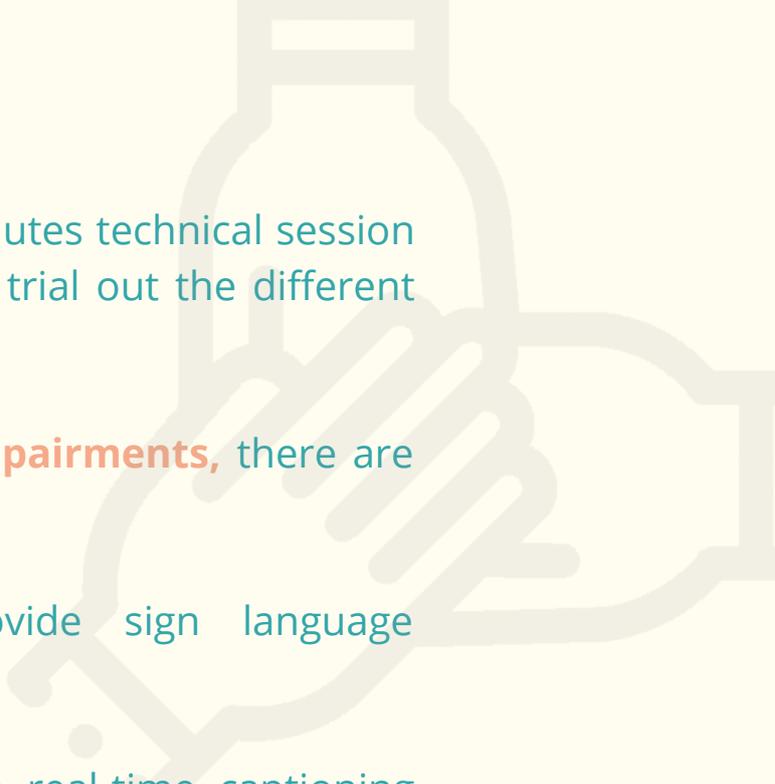
A faint, light-colored illustration in the background shows a hand holding a bottle, with another hand reaching towards it from the right. The lines are simple and stylized.

Inclusivity within accountability is about ensuring that people are at the centre of decision making. Inclusion at virtual AGMs therefore is crucial as it has a ripple effect in informing the direction, programmes and practices within an organisation. Erasing the barrier of participation at these types of meetings is important to include all voices into organisational processes, enabling for a wider range of perspectives and inputs. See below for some good practices, and tips on how to make your AGM more inclusive and diverse!

Inclusion & Accessibility Good Practices

- Review your invitation list and consider your stakeholders and members. Have you missed out on a key stakeholder group? Whose voice should be heard at the AGM?
- Engage your participants before the AGM. Since not all needs are apparent, consider asking your participants if they have any special requirements in the registration survey. For example, ask your participants:
 - if they have speaking difficulties
 - visual or hearing impairments and what are their specific needs for access
 - if they would need translation
 - if they have low internet connectivity
 - if they are not very acquainted with some computer applications.

This way, you don't have to plan for scenarios that may not arise; you'll also be able to understand the needs of your participants and adjust accordingly.

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- **Host technical sessions** - a 30 minutes technical session could be useful for participants to trial out the different applications that you are using.
 - **For participants with hearing impairments**, there are available options to:
 - Hire a professional to provide sign language interpretation.
 - Hire a professional to provide real-time captioning through vendors such as CaptionAccess, and Streamtext, especially for events where speakers will be interacting with attendees and answering questions in real-time.
 - **For participants with visual impairments**, there are options to:
 - Ensure virtual invitations and presentations are simple, well and clearly laid out, and in colours that are easy to read
 - Use digital platforms that can enhance accessibility, e.g. [Pheedloop](#) or connect visually impaired participants with sighted volunteers, e.g. [Be My Eyes](#).
 - **Good quality sound is crucial** for those with hearing impairments and for those providing interpretation. Ensure hosts have clear audio and are in a quiet room. Ask people to say their name before they speak so captioners and participants know who is talking.



Language use is very important, and this goes beyond the linguistic barriers:

- Real-time interpretation applications and translators are available e.g. [Kudo](#), [Translators Without Borders](#). To manage expectations, do make it clear which languages will be interpreted ahead of the meeting
- Avoid ableist and negative language in order to be more inclusive in the way we speak. [HBR has a great guide on this.](#)
- Make sure the language you use is inclusive of all gender orientations, ask for pronouns and preferred names ahead of meeting. Request all participants put these in their display name.



If participants have low internet connection, or lack access to internet:

- Record meetings and add subtitles using transcript technology, such as [Otter.ai](#).
- At the beginning of each session of the meeting, make sure to run through the basics of how to use the technology. Even if all participants know how to use Zoom, updates and patches may suddenly change the display and user interface.
- Provide options for connecting via phone and encourage participants who may have shaky internet connection to connect to the call with a phone line. Most online platforms, including Zoom, provide call-numbers that are toll-free.
- If possible, broadcast your AGM on a YouTube/Facebook stream and record your event for participants to catch up with later.

Good practices from the sector



INTEGRITY ACTION

Integrity Action ensure all staff are prepared

Preparation is key, and it is important for all staff to be aware of the digital tools you are using to host your event. That's why Integrity Action staff are asked to review Zoom guidelines to ensure they know and understand all functionalities and features.



InterAction

A United Voice For Global Change

InterAction's Tips for Digital Networking

For their Forum 2.1, InterAction hosted Virtual Coffee Breaks with a guiding question or topic that sparked conversations between participants. They hosted One-on-One Speed Networking, which enabled participants to meet one another through five-minute rotations. While both formats were very successful, InterAction reflected that many participants indicated that they would have preferred a little more time to connect.



**Accountable
Now**

GLOBAL STANDARDS LOCAL TRUST

Accountable Now works with event management services

To ensure that the management of digital events goes smoothly, Accountable Now works with event management services who facilitate the set-up and management of virtual meetings. Breakout rooms, presentations and hosting can then smoothly be managed whilst Accountable Now focuses on the content of the meeting.



CIVICUS Digital Networking For Participants Who Speak Different Languages

CIVICUS has participants from all over the world at their AGM, and in their digital networking session, sorts participants by language. Active participation in events facilitates networking, and so they worked a lot with ice breakers, formats and conversation starters to break down the digital barrier and put a human face to the squares on the computer.



350.org Supports Participants To Join Their AGM

350 acknowledges that internet connections vary in quality, safety and cost around the world. Therefore through a Participation Equity Fund, they have been able to provide monetary support to some individuals or groups of participants. The Fund is managed by and assigned to 350.org's national teams.



Social Value International engage with their partners to deliver multi-lingual events

SVI built their event in partnership with their global network, ensuring they would be able to offer sessions in different languages.



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