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Guide to the New Norm for Successful Civic Meetings

Even as restrictions on in-person gatherings are eased with councils and boards start returning to meeting rooms, ongoing needs of maintaining physical distancing, accommodating vulnerable participants and preparing for future emergencies will continue to make hybrid meetings essential for modern democracy. To ensure continuity, efficiency, and effectiveness, the new norm must seamlessly integrate both virtual and physical meeting environments into a single, unified experience. This paper explores the key requirements for future civic meetings and approaches for successfully managing them.

The COVID-19 pandemic has caused rapid change in almost every facet of our lives, and has accelerated the acceptance of online or electronic alternatives for cornerstones of society that had continued to be dominated by in-person interaction. Doctor visits have given way to telemedicine; schools have shifted to remote learning; and worship has moved in greater numbers from church buildings to online streams. Day-to-day operations for most companies and organizations ground to a halt, subsequently replaced by remote working processes where possible.

For municipal governments and other public sector organizations, one of the key functions most directly impacted by physical distancing restrictions has been their council and committee meetings. Such sessions are crucial in advanced democracies, leading meeting administrators and IT staff to quickly adopt web-based video conferencing solutions such as Zoom and Microsoft Teams.

In this necessary haste, however, the execution of these meetings on virtual platforms often fell out of sync with the organizations' established procedures and objectives. Continuity was lost as members split their focus between the meetings themselves and the technology learning curve. Public sector organizations that were on the cusp of modernizing their meetings – originally motivated by efficiency, resources savings and transparency – have been forced to accelerate their transition, while groups still rooted in paper-based processes scrambled to catch up simply to keep their governance functioning. Public sector organizations that had already embraced electronic meeting management and remote participation (where permitted) had a significant head start on their paper-burdened counterparts, but nobody was 100% prepared for the sudden, wholesale move to virtual meetings. Gaps were exposed in even the best-laid contingency plans.

The End of the Old Norm

While the COVID-19 crisis will eventually pass, its impact on traditional civic meeting practices will be ongoing. Follow-on waves of the pandemic may continue for many months, forcing additional periods of physical distancing restrictions. But even beyond that, the shift to remote civic meetings will not be entirely reversed.

Council and board members may return to meeting rooms in whole or in part, but their eyes have been opened to two striking realities. First, that their traditional dependence on in-room meeting processes is inherently vulnerable to emergency situations. But just as significantly, it has now been proven that "hybrid" meeting approaches spanning virtual and physical environments can successfully work. For example, near the end of May, Canadian Prime Minister Justin Trudeau told reporters that the hybrid model being used by Canadian Parliament – with some members physically-distanced within the House of Commons, and other representatives participating

remotely via video – was enabling it to keep working[1]. Such approaches are bound to become even more effective as governments have time to refine them and acquire the advanced toolsets needed to efficiently manage them.

Organizations can no longer rely on all their members being able to meet in person, as COVID-19 has changed people's expectations and comfort levels. Even when the COVID-19 is behind us, people's awareness of health fragility has been heightened. Councilors with mild symptoms of a common cold may still be discouraged or precluded from attending in person, while members in vulnerable demographics may also prefer remote participation. At minimum, a hybrid approach to meetings will be needed to accommodate these members. Similarly, with respect to citizen engagement, the days of elderly constituents coming to a council meeting and using a shared microphone to present their views may be over – but they still must be able to participate, so must be accommodated by other means.

The pandemic has also expedited another ongoing trend within the public sector – the move from paper to electronic information formats. In our white paper *Digital Transformation: The Death of Paper in the Digital Age*, we talked about the changes across multiple information publishing eras, from Pre-paper (stone tablets and chisels), to the Paper Age, and now the Digital Age in which content is created, stored, delivered and consumed entirely electronically.

Organizations that were still in transition between paper and an all-digital world have new motivations to move away from physical media. (Of course, there were plenty of strong reasons to move from paper to electronic already). Just as contactless payment has become preferable to cash because of the risk of virus transmission on the physical surfaces, the passing around of paper-based documents for review, approval signatures and consumption raises health concerns.

At the same time, paper and pen seem woefully archaic and inflexible in the context of virtual and hybrid meetings. Distributing paper agendas to support meetings that are conducted electronically simply does not make sense. Public sector organizations will already require electronic tools to conduct the proceedings effectively – actively managing elements such as debate and voting – so handling meeting artefacts within the same platform will maximize efficiency and flexibility.

Even distributing documents in PDF format – which often is essentially used as electronic paper – may not be optimal in hybrid meeting and working models. Changes to the agenda order, late additions and deletions can still be cumbersome with PDFs, and ensuring each participant is working only from the latest version of a PDF can be close to impossible. Ideally, documents

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1   "Trudeau defends suspending regular House sittings, downplays chance of snap election", CTV News, May 27, 2020, https://www.ctvnews.ca/politics/trudeau-defends-suspending-regular-house-sittings-downplays-chance-of-snap-election-1.4957370

such as agendas and minutes must be handled dynamically and holistically in the same platform that manages the meeting itself.

The New Norm: Hybrid

Whether for individual accommodations or as a contingency for future emergencies, hybrid meetings must underpin the new norm. Legislative restrictions on remote meeting participation in certain jurisdictions are also likely to be adapted to accommodate these new needs on an ongoing basis even after emergency orders have expired.

Organizations' default approaches to meeting formats will essentially break down into three camps:

- Physical, in-person meetings whenever possible, but immediately ready to switch to remote meetings if forced again by another emergency.

- Split participation to enable distancing within the physical environment, with part of the membership attending in meeting rooms and the remainder participating remotely. Members may be divided into groups that alternate or rotate between in-person and virtual attendance.

- Ad hoc, with in-person attendance the primary format but individual members choosing to participate remotely based on their preferences or personal circumstances (for example, vulnerability, self-isolation because of symptoms, or localized emergencies in his or her particular community).

Depending on the nature of a particular meeting, it might be held entirely in a virtual environment powered by software such as Microsoft Teams or Zoom, or entirely in meeting rooms with their own in-room meeting and AV technologies. Far more likely, however, is that most meetings will fall somewhere in between – one session may be split 50-50, another session may have 19 people in a room and one on Teams; the next meeting may be the opposite.

To maintain continuity, organizations must be prepared to accommodate anything on the spectrum in between. The ability to efficiently and effectively conduct hybrid meetings that seamlessly span both in-person and remote participation needs to become a core capability of their technology, processes, and planning, so they don't need to ramp back up again each time the need inevitably arises.

While the hybrid meetings themselves entail the most complexity because of their real-time nature, pre-meeting preparation has changed as well. Many physical work environments such as office buildings and municipal departments were not designed to respect physical distancing, and in fact the trend in recent years towards collaborative, shared spaces further exacerbates

the issues. Many organizations are now splitting their teams between the office and working from home – sometimes based on role, sometimes in rotating shifts – to enable appropriate staff spacing. Collaborative functions such as agenda creation, submission and approvals must thus also adopt hybrid working models that enable the documents to flow frictionlessly between in-office and remote staff.

Bridging Virtual and Physical Meeting Rooms

Conducting efficient and effective hybrid meetings is not as simple as just having all remote participants jump on a Zoom or Microsoft Teams call. The meetings will span both virtual and physical meeting rooms, and integrating the two environments requires more than just putting a webcam and large video conferencing display in the physical room. It is critical that participants in both realms be treated and managed equally. For example, remote participants cannot be treated as second class by their in-room counterparts simply because they are communicating on a screen instead of face to face.

For the virtual and physical domains to smoothly function together as a single meeting, a system is required to seamlessly manage both environments and their respective participants in real time. That solution should be able to actively manage everything from debate and voting to quorum and member presence. Request-to-speak queues should treat remote and in-room participants equally, while centralized microphone control should be available to limit council members talking over each other. Comprehensive electronic voting encompassing both remote and in-room voting devices is far more efficient and less error-prone than counting shows of hands seen in video conferencing windows. And if a remote member unexpectedly drops out, possibly because of network connectivity problems, ideally the system would account for his or her change of presence.

Of course, all of this must be made easy for the meeting administrator to manage. Rather than adding a new layer of complexity, the system bridging the two environments of a hybrid meeting must simplify their job, transparently becoming part of the fabric of the meeting.

Fortunately, the core technology needed to achieve these goals already exists. Top-tier electronic meeting management software is already known for creating significant efficiencies before, during and after municipal meetings and providing dynamic access to up-to-date information such as agendas. With a few enhancements, this same technology can extend these benefits further to holistically integrate virtual and physical meeting environments as one.

The core components of effective hybrid meetings can thus be summarized as the virtual environment, the physical environment, and the bridge that brings them together:

- *The Virtual:* the video conferencing system. This is the baseline for participants to communicate with each other. It will most commonly be browser- and app-based,

Virtual Meeting Environment — eSCRIBE Electronic Meeting Management — Physical Meeting Environment

mainstream conferencing software such as Zoom, Microsoft Teams, WebEx and GoToMeeting. Which of these platforms you choose will likely depend on your budget, security requirements, expected number of participants, and factors unrelated to the civic meetings such as integration with your organization's other tools. Your municipality may have already standardized on one of these platforms for internal video communications, so it may be natural – and easier for your IT team – to use the same tool for your public meetings.

- *The Physical:* the in-person meeting room. Rooms may need to be redesigned or moved to larger spaces to accommodate physical distancing requirements, or may be used in their existing form with fewer in-person participants. These environments have their own in-room audio-visual (AV) technology components, whether independent microphones, speakers, cameras, and (for some of those already using electronic voting) voting terminals, or comprehensive discussion conferencing systems – combining advanced audio capabilities with electronic voting, camera tracking and more – such as those offered by Televic.

- *The Bridge:* the meeting management system (MMS). This platform is the glue that holds it all together, and in addition to addressing the above needs for blending the virtual and physical spaces into a unified experience, also enables the efficient hybrid workflows now needed for pre-meeting preparations (agenda creation, etc.) described earlier. The MMS not only integrates with the technologies powering the virtual and physical environments – as well as handling artefacts like agendas and minutes – but just as importantly manages procedures, members, and the session itself.

Even better, a robust meeting management system will offer tools to help move citizen participation online. Given the physical participation concerns outlined earlier in this paper, municipal organizations need digital channels that enable remote citizen engagement before, during and after the meeting. Last but not least, webcasting – already an important component in many organizations' transparency toolbox – becomes even more important in a physically-distanced world. Webcasts must expand beyond covering activities only within meeting rooms, to also incorporate video conferencing feeds from remote participants.

It is also important to choose the right technology vendor for each of these components. No vendor could have truly anticipated an event with the global scope and magnitude of the COVID-19 pandemic. The solution providers best equipped to help public sector organizations adapt their operations while maintaining efficiency and continuity are those that are not only forward-looking, but also nimble and customer focused.

Helping You Face the New Norm

At eSCRIBE, we have long been preparing for a future in which hybrid meetings would be a routine part of modern democracy. However, like everyone else, we did not foresee the speed and suddenness with which this change would be essentially forced upon our customers. We quickly adapted our roadmap to release new options like our Public Comments module to provide new paths for citizen engagement online, and we are accelerating development of enhanced functionality to further optimize remote and hybrid meetings. Upcoming integration between the eSCRIBE platform and web conferencing solutions including Zoom and Microsoft Teams will add microphone and camera control by meeting administrators or chairs, as well as presence management, while integration with hardware solutions from our partner Televic will provide similar toolsets for managing in-room attendees.

While the COVID-19 crisis will eventually be behind us, whether as the default practice or an emergency contingency, the need for hybrid civic meetings is here to stay. The good news is that they are not hard to achieve, and eSCRIBE is ready to help you navigate the new normal.

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