GOVERNING A COLLEGE USING VIRTUAL MEETINGS

REPORTED EXPERIENCE, DISCUSSION, AND ADVICE FOR EFFECTIVE VIRTUAL GOVERNING COLLEGE MEETINGS

November 2020

CONTENTS

FOREWORD

This is a timely and very welcome project, examining the experiences of colleges in Scotland and England in using virtual meetings for boards and governors.

The report demonstrates how inventive and pragmatic college governing bodies have been in adapting during the pandemic, whilst staying focussed on the essentials of their roles. It gives great assurance that colleges are still being led effectively, despite all the challenges of these times.

The report provides insight into the experiences of colleges, of chairs and of governing body members, and should be useful reading for governance professionals, college leaders and others interested in governance. We are delighted to be able to present this work to support continuous improvement.

Sharing of experiences, of approaches, of what works well and what doesn't work so well are all part of the process of getting things right. Doing that across Scotland and England adds to the richness of the learning, something we are keen to continue in the future. The partnership between our organisations and networks is an ever more impactful and productive one.

The recommendations included offer a great checklist for boards, given how likely it is that the current restrictions will be with us for some time to come. In fact, we expect many of the changes and adaptations made to last into the long term, because far from being all negative, the report shows that there are benefits in a degree of virtual meetings alongside face to face. This mirrors the experience in colleges that a blended offer of some online and some face to face teaching might prove to be the best combination for many students.

We would like to congratulate all of those involved in college governance for their tenacity and flexibility to make things work since the pandemic began. We know that you will continue to show that governance in colleges is in safe hands, providing the assurances and the accountability to funders and the community that our institutions are overwhelmingly well managed and moving forward.

David Hughes
Chief Executive
Association of Colleges
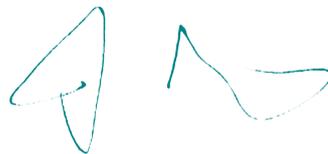
Jim Metcalfe
Chief Executive
CDN

EXECUTIVE SUMMARY

This report considers the governing of colleges during a time of lockdown arising from the Covid pandemic, and seeks to provide advice for future use of virtual governing meetings. The report utilises 311 responses to a questionnaire distributed to college governors, governance professionals and principals in July 2020 across England and Scotland. The report also draws upon the experience of wider examples of online meetings. The significant achievement of moving very quickly from face to face governing meetings to online meetings, to achieve the responsibilities of college governing bodies, is recognised.

The report acknowledges that online governing has been implemented as a necessity under the lockdown circumstances and it is appreciated that online governing meetings of, for example, 15 governors plus senior staff and a governance professional, do not necessarily easily convert from former face to face meetings. Recommendations are provided with the intention to maximise the success of online virtual college governing board meetings. Examples of recommendations include appreciating the potential of the selected technology, making sure all meeting participants can use the technology, and shaping the governing event to get the best from the virtual meeting arrangements.

INTRODUCTION

This report considers the governing of colleges during a time of lockdown arising from the Covid pandemic, and seeks to provide advice for future use of virtual meetings.

The report utilises 311 responses to a questionnaire distributed to college governors[1], governance professionals and principals in July 2020, looking at the period April – July 2020. The report also draws upon the shared experience of wider examples of online governing activities.

The contents of the report include the following sections:

• Governing colleges before Covid 19 ie prior to March 2020
• Lockdown from March 2020 (including questionnaire responses from colleges in England and Scotland)
• Themes, discussion and literature
• 'Best practice' for virtual meetings
• Action list – recommendations
• Concluding comments

This report was commissioned by College Development Network (CDN) and the Association of Colleges (AoC).

Grateful thanks are extended to the 311 respondents to the questionnaire.

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1   The term 'board members' will be used throughout the report.

1. GOVERNING COLLEGES BEFORE COVID 19

1.1 Purpose and nature of governing colleges

Colleges provide a variety of primarily vocationally-focused courses which can range from entry level to post-graduate status. Colleges are located within and connect with a variety of communities and often act as a hub for employment and employer engagement.

From the Association of Colleges website:

> **The general further education colleges in England provide high-quality technical and professional education and training for young people, adults and employers. They prepare students with valuable skills for the workplace, helping to develop their career opportunities and strengthen the local, regional and national economy.**

From the Colleges Scotland website:

> **Colleges have a critical role in supporting individuals and businesses in Scotland, enhancing citizenship, and providing leadership in the communities and regional economies in which we are situated. The college sector will be pivotal in: 1. Developing our people and partnerships 2. Supporting a successful economy 3. Helping communities thrive.**

Each college (Scotland) and further education corporation (England) has a governing body. The governing body is composed (typically 15 in total) of mainly external people with a passion for vocational learners and learning, workforce and economic development, and community coherence. Many college governing bodies meet in full approximately four times per year and, according to circumstances, maybe as frequently as once per month at times in the college year. In addition, college governing bodies usually establish committees to assist with their responsibilities. Thus, a board member may also participate in some of the following eg an Audit Committee, a Search Committee, a Curriculum and Quality Committee, a Finance and Resources Committee.

1.2 Board Members and colleges – interactions

Before Covid 19, board members would attend colleges regularly for formal meetings mentioned in 1.1 and also for more informal occasions such as student achievement celebrations, graduation ceremonies, 'learning walks', departmental visits, employer breakfast briefings, college strategic development events, board member/chair reviews, and so on. Some board members, especially office holders such as the chair of the governing body, may be attending college as often as once per week. Part of this board member engagement with the college was to help board members gain a sense of the working life of the college, and also for college students and staff to become familiar with board members.

1.3 Agenda formation and papers

The formal business of the college governing body is largely dictated by the responsibilities the governing body holds for the financial health of the college as an institution, and for the quality and range of the educational provision offered by the college. The governing body will want to ensure the college is complying with public funding regulations and operating within the relevant employment, health and safety, equality, and safeguarding legal and procedures frameworks. Crucially, the governing body should ensure compliance with its own governing documents and the relevant code it has signed up to. Also, the governors will need to plan for the future and set objectives for college management to work towards. The governing board agenda and papers supporting this nature of business can be lengthy and demanding for board members and college senior staff. The overall process of governing is guided, advised and shaped by a governance professional on behalf of the college governing board.

1.4 Meeting arrangements

Typically, a college governing board would meet in a board room at a table sufficient for all board members and relevant senior staff plus the governance professional.

The meeting agenda and papers are either posted to board members or are provided via an online governing support system to reduce paper and postage. Board members would sit around the board table, reading and referring to paper copies of reports or using an electronic device to access the agenda and papers. Many meeting rooms also utilise an electronic screen for presentations and governor papers. Typically, college board meetings would last between 2 – 3 hours. Committee meetings were more likely to be 1.5 hours – 2 hours in length.

1.5 Covid 19

The governing of colleges was proceeding as usual when the significant change in social and working conditions was imposed by national governments within the UK in late March 2020. Colleges were moving into a period which had not featured on most strategic risk registers, there were no well-established mitigating actions, but there was also a need for governing colleges to rise to the occasion – suspending governing arrangements because face to face governing board meetings were no longer possible.

2. LOCKDOWN FROM MARCH 2020

2.1 Studying the period March to July 2020

How college governing bodies responded to this new and very worrying situation for students, staff, board members and college stakeholders is the subject of this report.

The report draws upon a variety of sources of evidence to look at what happened next.

- A questionnaire was circulated to colleges in England and Scotland from 9 July 2020 following more than three months of lockdown conditions
- Many respondents provided personal comments to enrich their responses to the questionnaire
- Two governance professionals have provided a 'conversation' which tells the story of their response to the sudden changing from face to face governing board meetings to the necessity of online governing with virtual meetings.

In the light of the emerging picture of governing practice, the report will also consider how best to assist the continued effective working of college governing bodies under conditions of a socially and economically threatening Covid 19 pandemic.

2.2 Questionnaire and responses

The response to the questionnaire was as follows:

- 71 responses were received from colleges and regional boards in Scotland
- 240 responses were received from colleges in England

In total, 311 responses were received by 31 July 2020. The breakdown of respondents is shown in Table 1 & Table 2.

Table 1: Breakdown of questionnaire responses: Scotland

Category	Response
Chairs	6
Board Members (excluding Chairs)	43
Governance Professional	20
Principal/Chief Executive	2
TOTAL	71

Table 2: Breakdown of questionnaire responses: England

Category	Response
Chairs	37
Board Members (excluding Chairs)	153
Governance Professional	25
Principal/Chief Executive	25
TOTAL	240

2.3 Interpreting the questionnaire data

This section is further divided into four sections, to achieve a picture from each of the key players in the governing of colleges – board members (with a distinct section on chairs), governance professionals, and principals (reflecting the fact that the principal is the senior college leader and also usually a board member).

2.3.1. The Chair's perspective

i. Pre-Covid experience

The purpose of this section of the questionnaire was to explore the degree of confidence chairs considered they had pre-Covid lockdown conditions. This starting point is important as it gives an insight into the degree of change that chairs would have to make in coming to terms with onlining college governing practices. Of all the roles associated with college governing, the chair is obviously the most visible to fellow board members.

Table 3: Familiarity with online meeting software pre-Covid (England/Scotland)

	England (%)	Scotland (%)
Skype	54	83
Zoom	26	33
Microsoft Teams	34	33
Google Hangouts/ Google Meet	6	0
GoToMeeting	17	33
None	26	17

Table 4: Experience with use of virtual meeting software at work (England/Scotland)

	England %	Scotland %
Usually very good	34	3
Patchy, sometimes better than others	43	50
Usually frustrating	3	0
Disappointing	3	0
Never used	17	17

Table 5: Experience with use of virtual meeting software for social purposes (England/Scotland)

	England %	Scotland %
Usually very good	40	50
Patchy, sometimes better than others	31	33
Usually frustrating	0	0
Disappointing	6	0
Never used	23	17

In summary, this pattern from chairs as respondents shows a wide range of prior-Covid virtual meeting experience. It is worth noting that the virtual meeting system with which most respondents were familiar was Skype. Whilst this general familiarity was obviously useful, it will be seen later in this report that Skype was not the system adopted by most colleges for virtual meetings. It is noteworthy that 26% of respondents declared they had no prior experience of virtual meeting systems.

ii. Perception of the online meeting experience of other players in governing colleges

These questions were intended to explore the impression of the preparedness of the governance professional and principal, as seen from the chair's perspective, for online meetings.

Table 6: Perception by chairs of college governing bodies of online meeting confidence in principals and governance professionals [England/Scotland]

	England %		Scotland %	
	GPs	Principal	GPs	Principal
Already confident using online methods	25	61	33	83
Gained increasing confidence	72	39	67	17
Marginalised, resulting from the online methods	0	0	0	0
Other (please specify)	278	0	0	0

The picture from respondents presented in Table 6 clearly shows the perception by chairs in the apparent confidence in online methods by principals, with much less perceived confidence shown by governance professionals. On this basis, many governance professionals had a much bigger task to address, in order to convert face to face governing meetings to online meetings. The data on increasing confidence (by July 2020) suggests that perhaps some governance professionals were still coming to terms with the new way of working.

iii. During lockdown

This section reports the experiences of virtual meetings by chairs during lockdown (April to July 2020).

Table 7: Virtual meetings during lockdown

	England %	Scotland %
Virtual meeting system for board meetings only	14	0
Virtual meeting system for board and committee meetings	97	100
Virtual meeting system for chair/principal/governance professional	80	83
Virtual meeting system for chairs' briefing	43	50
Virtual meeting system for 'external' presenters to virtual meeting e.g. auditors, technical advisers, consultants	49	50
Virtual meeting of chairs' committee	40	50
Not at all	0	0
Other	14	17

NB: More than one option could be chosen so responses come to more than 100%

Table 8: Systems used for governing meetings

	England %	Scotland %
Skype	3	50
Zoom	46	50
Microsoft Teams	86	83
Google Hangouts/ Google Meet	6	0
GoToMeeting	0	33
Starleaf	0	0
Adobe Connect	0	0
Big Blue Button	3	0
Not at all	0	0
Other	3	33

N.B. more than one option could be chosen so responses come to more than 100%;

Table 9: Perception of the effectiveness of virtual meetings

	England %	Scotland %
Effective	74	83
Partially effective	26	17
Ineffective	0	0

Table 10: Number of virtual governing meetings attended

No of meetings	England %	Scotland %
1	3	0
2	0	0
3	6	0
4	12	33
5	12	0
6	9	17
7	3	0
8	12	17
9	3	0
10	3	0
11 or more	36	33

In summary, respondents report that virtual meetings had been used for governing board and other meetings – both formal and informal. Microsoft Teams is reported to be the most common software used; a detail repeated in responses by board members, governance professionals and principals. Most respondents believed the online meetings were effective, although it is important to note that a significant proportion of respondents believe the virtual meetings to be only 'partially effective'. Some of the reasons given for 'partial effectiveness' included 'the need for two screens so that online papers could be viewed alongside the meeting attendees' and 'couldn't see all the participants'.

iv. Reflecting on the experience

These questions were intended to look back over the period of governing the college since lockdown ie April to July 2020, to consider the overall experience.

Table 11: Reflections on confidence using online governing

	England %	Scotland %
No difference	13	0
Yes, because, the experience was good from the start and it has maintained that standard	41	0
Yes, because everyone is gaining confidence in the meeting system	72	67
Participants are gaining experience of online meetings for meetings and socially	19	33
The governance professional is providing more guidance on online meeting protocol	13	0
Increased confidence at hosting an online meeting	25	33
I now prepare for the online meetings in a different way	13	17
The meetings achieve a higher attendance rate	31	17
IT support is available during the meetings	0	0

NB: More than one choice was possible

Table 12: Reflections on the governing meeting agenda

	England %	Scotland %
The agenda is the same, just handled online	75	33
The agenda has focused on the essential items only (including Covid-19)	25	67
The agenda is dominated by Covid-19 only	0	0

Table 13: The overall viewpoint on the use of virtual governing meetings

	England %	Scotland %
The use of virtual meetings has been a constructive and positive development to support governing	97	83
The use of virtual meetings has been a distraction and may have muddled the governing priorities	3	0
No opinion	0	17

v. Looking to the future i.e. from July 2020 onwards

Table 14: Identifying the enjoyments from online governing

	England %	Scotland %
Better governor /board member attendance	65	50
More convenient to join the meeting from home	77	100
Better focus to meetings	58	67
Shorter meetings	29	17
A sense of equality within the online meeting system	13	17
More relaxed away from the formalities of the boardroom	13	17
Other (please specify)	23	0

NB: More than one option choice was possible

Table 15: The perceived limitations of online governing

	England %	Scotland %
None, I'd like to return to all the previous ways of working	9	0
None, but I support online methods in principle	27	17
I'd like to have all formal meetings online	9	17
I'd like committees to be online, with board meetings returning to face-to-face	33	33
I'd like strategic development events to be online in future	9	0
Other (please specify)	52	33

SELECTED COMMENTS FROM CHAIRS

I find the biggest problem is chairing a meeting with over 20 attendees. You need two screens and managing the agenda, taking note of what is being said relevant to the papers and managing people who wish to contribute is very challenging. In addition, I find that the personal interaction is missing from online meetings. [Q38/1/1]

I think difficult discussions are much harder to handle online than face-to-face and what we've been doing is emergency remote governing. [Q38/12/10part]

An effective and robust board needs its members to have confidence in each other and this can only be done in person – albeit with virtual playing a part. An ineffective board …. Is unlikely to be made better by being virtual and is likely to confuse managing process with ensuring effective outcomes. [Q38/12/5part]

Online meetings are a great tool, but there is still something missing when you are not in the same room as your fellow attendees. Physical meetings are still important. [Q38/12/7]

2.3.2. The Board Members' perspective

i. Pre-Covid Experience

The majority of the respondents to the questionnaire were board members who were neither chairs nor principals. This section shows the starting point for respondents in relation to experience with online virtual meetings.

Table 16: Familiarity with online meeting software pre-Covid (England/Scotland)

	England %	Scotland %
None	25	10
Skype	58	85
Zoom	27	25
Microsoft Teams	33	43
Google Hangouts/ Google Meet	8	8
GoToMeeting	12	10
Starleaf	1	3
Adobe Connect	4	5
Big Blue Button	2	0
Other	15	20

Table 17: Experience with use of virtual meeting software at work (England/Scotland)

	England %	Scotland %
Usually very good	23	43
Patchy, sometimes better than others	49	30
Usually frustrating	4	13
Disappointing	1	0
Never used	23	15

Table 18: Experience with the use of virtual meeting software for social purposes

	England %	Scotland %
Usually very good	23	38
Patchy, sometimes better than others	39	35
Usually frustrating	7	3
Disappointing	1	0
Never used	30	25

It can be appreciated from the responses presented that there was a range of previous experience with online meetings with significant percentages of board members from England and Scotland respectively who declared that they had had no previous experience of virtual meeting software. Where there was experience, the majority declared experience with Skype.

ii. Perception of online meeting experience of other players in governing colleges

Having declared their own baseline, board members were asked to share their perception of the online meeting experience of the principal and the governance professional – both key players in the governing processes for colleges. The overall perception was of the greater confidence in online meetings by the principal, and less so by the governance professional prior to lockdown conditions.

Table 19: Perception by board members of online meeting confidence in principals and governance professionals [England/Scotland]

	England %		Scotland %	
	GP	Principal	GP	Principal
Already confident using online methods	42	61	38	60
Gained increasing confidence	51	35	54	38
Marginalised, resulting from the online methods	3	1	3	3
Other (please specify)	4	3	5	0

iii. During Lockdown

The following responses show that face to face formal governing meetings changed into virtual formal meetings during lockdown – for both board and committee meetings. Examples were also provided of other ways in which virtual meetings replaced traditional face to face arrangements. The majority of respondents reported the use of Microsoft Teams. Perceptions of governing effectiveness from both English and Scottish respondents was approximately 75%. On the one hand, this score indicates considerable room for improvement, but given the starting position at the beginning of lockdown and the additional pressures of governing a college at the time of a pandemic, reaching 75% effectiveness using virtual meetings in three months could be considered a significant success.

Table 20: Virtual meetings during lockdown

	England %	Scotland %
Virtual meeting system for board meetings only	16	20
Virtual meeting system for board and committee meetings	93	100
Virtual meeting system for chair/principal/governance professional	34	38
Virtual meeting system for chair's briefing	16	50
Virtual meeting system for 'external' presenters to virtual meeting e.g. auditors, technical advisers, consultants	29	40
Virtual meeting of chairs' committee	23	35
Not at all	0	0
Other (please specify)	9	13

Table 21: Perception of effectiveness of meetings

	England %	Scotland %
Effective	78	75
Partially effective	22	23
Ineffective	1	3

For respondents from Scotland, reasons for 'partially effective' or 'ineffective' were given as

- technical issues (89%),
- could only hear the voices (44%),
- needed two screens (to see the online papers) (44%),
- couldn't get access to the meeting (44%)
- couldn't see all the participants (33%),
- didn't know how to use the system (22%),
- people were talking over one another (11%)
- could only see people, no sound (11%).

For respondents from England, reasons for 'partially effective' or 'ineffective' reasons for partial effectiveness were given as

- needed two screens, so I could see my online papers as well (62%)
- couldn't see all the participants (59%)
- technical issues, such as frozen screen, broadband variability (55%)
- people were talking over one another (31%)
- could only hear the voices, no pictures (14%)
- couldn't get access to the meeting (14%)
- novelty of using the system overwhelmed the meeting (10%)

Table 22: Number of meetings attended

Number of Meetings	England %	Scotland %
1	5	0
2	12	5
3	13	26
4	14	23
5	16	15
6	12	3
7	4	8
8	6	10
9	1	0
10	1	0
11 or more	14	10
none	1	0

In summary, whilst there has been considerable progress in the use of online governing practices and the system has enabled college governance to keep going, there's also room for improvement in the use of virtual meetings. The reasons for 'partial effectiveness' or 'ineffective' and the magnitude of response from board members shows that improvement in the virtual meeting experience is required, accepting that virtual meetings cannot match the nature of face to face meetings.

This report will provide guidance on how to improve virtual governing meetings in sections 4 & 5.

iv. Reflecting on the experience

The following tables illustrate a range of reflections by board members on their online governing experience to July 2020. Board members reported gaining confidence over a relatively short period of time as familiarity developed with the selected virtual meeting system. It is probable that many board members were gaining confidence with online meeting practices generally during this time. It is significant that attendance rates at governing meetings in both England and Scotland are believed to have improved, thus suggesting convenience for board members overcame reluctance to attend virtual meetings despite a preference for face to face arrangements.

Table 23: Reflections on confidence using online governing

	England %	Scotland %
No improvement	9	10
Yes, because the experience was good from the start and it has maintained that standard	30	23
Yes, because everyone is gaining confidence in the meeting system	71	77
Participants are gaining experience of online meetings for meetings and socially	36	46
The governance professional is providing more guidance on online meeting protocol	14	10
Increased confidence at hosting an online meeting	12	21
I now prepare for the online meetings in a different way	27	31
The meetings achieve a higher attendance rate	24	13
IT support is available during the meetings	7	5

Table 24: Reflections on the governing meeting agenda

	England %	Scotland %
The agenda is the same, just handled online	82	75
The agenda has focused on the essential items only (including Covid-19)	18	25
The agenda is dominated by Covid-19 only	0	0

Table 25: The overall viewpoint on the usefulness of virtual governing meetings

	England %	Scotland %
The use of virtual meetings has been a constructive and positive development to support governing	88	87
The use of virtual meetings has been a distraction and may have muddled the governing priorities	1	8
No opinion	11	5

In summary, there is a close alignment between board members from colleges in England with board members from colleges in Scotland about the use of virtual meetings 'as a constructive and positive development to support governing'. Thankfully for colleges, responses suggest this new virtual meeting methodology is believed to have supported colleges at a time of pandemic rather than creating any further difficulties eg by paralysing governing decision making.

v. Looking to the future

Looking to the future should include consideration of the aspects of online governing that have been enjoyed, and also those aspects which caused concern. The reported enjoyments of convenience, better focus to meetings and improved governance attendance are obviously worthy benefits, but these have to be balanced against the caution expressed by respondents about what is missing in the use of online college governing notably personal contact with students and staff, possible reduction in the quality of debate and discussion, and the necessity to ensure all participants in the meeting are able to take part with confidence.

Table 26: Identifying the enjoyments from online governing

	England %	Scotland %
Better governor/board member attendance	29	31
More convenient to join the meeting from home	82	77
Better focus to meetings	28	41
Shorter meetings	29	31
A sense of equality within the online meeting system	9	18
More relaxed away from the formalities of the boardroom	17	21
Other (please specify)	14	10

⟩ EXAMPLES OF GOVERNOR COMMENTS

As volunteers, most of us gain a great deal of pleasure from personal contact with students and staff in the college setting. This would be denied to us if all meetings were remote. But technology has proved invaluable during lockdown [Q38/14/6]

Whilst online meetings may be necessary in some circumstances, they will never allow the full interaction of a face to face meeting. Online meetings usually produce a fragmented discussion due to the inability of all participants to interact at the same time for various reasons such as connection problems etc. [Q38/14/2]

If you want to win an argument, contrary to the recommendation, it is very difficult to muster support at an online meeting. [Q38/14/4]

In my view 'virtual' meetings have been very effective in enabling governance to continue, but there will always be a place for 'actual' meetings where team building and bonding are important. [Q38/42/13]

All attendees have a better opportunity to contribute. Able to hear participants more clearly during their delivery. I feel that I am contributing more at virtual meeting. Board meetings are a must for face to face. This has been a learning curve especially as I am visually impaired. Those who prepare the meetings for us participants deserve great credit. Not easy getting everyone linked in. [Q38/42/16]

We needed to recognise that some people were incredibly comfortable with the technology and others not – it made an appreciable difference. [Q38/42/23]

It is noticeable that there are fewer governors joining in discussions because being on-line allows them to be more passive, more anonymous than when in a room surrounded by everyone else. [Q38/42/37]

In summary, board members have responded to the necessity to govern colleges using virtual meetings. The period from April to July 2020 was clearly one of trying to make the new meeting arrangements work. The consensus is that virtual governing meetings have worked and indeed have afforded a number of benefits, such as increased board member attendance. However, there have been difficulties experienced by some board members which will need to be addressed.

The comments supplied by board members remind that virtual meetings are, of course, of a different nature to face to face meetings, especially for large groups such as full governing board meetings. The concerns about the impact of online governing meetings need to be recognised and considered by board members, the governance professional and college senior staff. Advice on ways to improve virtual governing meetings is provided in Sections 4 & 5 of this report.

2.3.3. The Governance Professionals' perspective

i. Pre-Covid experience

Alongside the views of board members (including chairs of governing boards) is the perspective from the governance professional – the post-holder with responsibility to facilitate the processes of governing, including both formal and informal meetings. Section 3 refers to the accounts from two college governance professionals (one from England, one from Scotland) which elaborate on the lived experience of the postholders during this time of sudden change in working practice in 2020.

Table 27: Familiarity with online meeting systems

	England (%)	Scotland (%)
Skype	28	20
Zoom	55	60
Microsoft Teams	20	10
Google Hangouts/Google Meet	25	35
GoToMeeting	14	0
None	6	25

Table 28: Experience of using virtual meeting systems for work purposes

	England %	Scotland %
Usually very good	22	30
Patchy, sometimes better than others	38	45
Usually frustrating	8	10
Disappointing	1	0
Never used	32	15

Table 29: Experience of using virtual meeting systems for social purposes

	England %	Scotland %
Usually very good	33	25
Patchy, sometimes better than others	25	35
Usually frustrating	3	5
Disappointing	0	0
Never used	39	35

In summary, responses from governance professionals makes clear that whilst many had prior expertise and experience with online meeting technology, a third had no experience of using online meeting arrangements for work – which is to be assumed to be college governance. Where there was experience, the most familiar system was Skype.

There are three matters to highlight here:

- A significant number of governance professionals were not familiar with online meeting systems from personal experience
- In any case, there is a distinction between being familiar with online meetings systems and using such systems for formal meetings
- Finally, it would seem that for those who were familiar with an online system, it was Skype which (as this report explains) was not the system of choice for many colleges as Microsoft Teams was more popular (presumably for its wider functionality).

ii. Perceptions of the online meeting experience of other players in governing colleges

The following table shows that governance professionals considered that relatively low percentages of board members were already confident with online meeting practices prior to Covid 19 lockdown (10% Scotland; 21% England). When this is coupled with the prior experience of the governance professionals, it shows the potential for marginalisation of both board members and governance professionals. Added to this should be the perception of the experience of principals which, although higher, was not fully expert or ready for online governing. The nature of the problem for governing colleges of converting from face to face meetings to online meetings is shown clearly by this picture.

Table 30: Perceptions of online experience of college governing players by governance professionals

	England %		Scotland %	
	Govs	Principal	Govs	Principal
Already confident using online methods	39	49	10	67
Gained increasing confidence	59	49	67	33
Marginalised, resulting from the online methods	0	1	5	0
Other (please specify)	2	2	19	0

iii. During lockdown

Table 31: Use of virtual meeting systems since lockdown

	England %	Scotland %
Virtual meeting system for board meetings only	7	5
Virtual meeting system for board and committee meetings	98	95
Virtual meeting system for chair/principal/governance professional	70	80
Virtual meeting system for chair's briefing	37	50
Virtual meeting system for 'external' presenters to virtual meeting e.g. auditors, technical advisers, consultants	64	60
Virtual meeting of chairs' committee	28	50
Not at all	1	0
Other (please specify)	8	5

Table 32: Perceptions of the effectiveness of governing meetings

	England %	Scotland %
Effective	86	60
Partially effective	13	40
Ineffective	1	0

'Partially effective' was selected by governance professionals from Scotland for the following reasons

- Needed two screens for sight of online papers as well (75%)
- Technical issues eg frozen screen, broadband variability (62%)
- Couldn't see all the participants (37%)
- People were talking over one another (25%)
- Didn't know how to use the system (25%)
- Couldn't get access to the system (25%)

'Partially effective' or 'ineffective' was selected by governance professionals from England for the following reasons:

- Couldn't see all the participants (73%)
- Technical issues eg frozen screen, broadband variability (55%)
- Needed two screens, so I could see my online papers as well (55%)
- People were talking over one another (36%)
- Novelty of using the system overwhelmed the meeting (9%)
- Could only see people, no sound (9%)

Table 33: Number of virtual meetings

Number of meetings	England %	Scotland %
1	2	11
2	4	5
3	7	21
4	5	0
5	8	11
6	6	11
7	4	11
8	12	0
9	2	0
10	7	5
11 or more	40	26
none	2	0

Table 34: Frequency of formal governing meetings

	England %	Scotland %
No change	36	42
slightly increased	45	42
significantly increased	14	11
slightly decreased	4	5
significantly decreased	1	0

In summary, this set of responses relating to 'during lockdown' show the considerable extent to which virtual meetings were introduced and used for governing processes during the three-month period April to July 2020 (approximately 12 working weeks). Many governance professionals reported involvement in 11 or more meetings – that could be one per week. This would be a higher frequency of meetings for many governance professionals, largely attributable to Covid response and Covid planning.

iv. Reflecting on the experience

Looking back over the period under review ie April to July 2020, governance professionals believed that the experience of virtual meetings was improving with increased familiarity with the system, and with increased familiarity with other similar systems. A higher attendance rate of governor participating in online meetings was recognised together with increased confidence of hosting (chairing) an online meeting. This picture is encouraging but doesn't necessarily add up to effective governing. The difference in impression of online governing being a 'constructive and positive development' [79% (Scotland) versus 95% (England)] further reminds of caution in keeping impressions about the success of online meetings (more process focused) distinct from effective governing (more deliberative and challenging).

Table 35: Reflections on confidence using online governing

	England %	Scotland %
No improvement	2	0
Yes, because the experience was good from the start and it has maintained that standard	39	11
Yes, because everyone is gaining confidence in the meeting system	73	83
Participants are gaining experience of online meetings for meetings and socially	47	33
The governance professional is providing more guidance on online meeting protocol	11	6
Increased confidence at hosting an online meeting	33	22
I now prepare for the online meetings in a different way	22	17
The meetings achieve a higher attendance rate	45	33
IT support is available during the meetings	6	0

Table 36: Reflections on the governing meeting agenda

	England %	Scotland %
The agenda is the same, just handled online	76	42
The agenda has focused on the essential items only (including Covid-19)	23	53
The agenda is dominated by Covid-19 only	1	5

Table 37: The overall viewpoint

	England %	Scotland %
The use of virtual meetings has been a constructive and positive development to support governing	95	79
The use of virtual meetings has been a distraction and may have muddled the governing priorities	1	0
No opinion	4	21

v. Looking to the future

Table 38: Identifying the enjoyment of online governing

	England %	Scotland %
Better governor /board member attendance	63	58
More convenient to join the meeting from home	77	74
Better focus to meetings	48	26
Shorter meetings	22	26
A sense of equality within the online meeting system	16	0
More relaxed away from the formalities of the boardroom	10	16
Other (please specify)	14	11

> SELECTED COMMENTS FROM GOVERNANCE PROFESSIONALS

I think attendance has improved because many people are working from home, and also, because without the need to travel meetings are, overall, less time-consuming. [Q38/34/18]

Because virtual governance has been driven by circumstance, I do think that training on platforms' functionality has not been undertaken at the same pace and feel somewhat behind in being able to support members effectively. [Q38/34/28]

We have adapted brilliantly and I would favour continuing with virtual arrangements to support increased attendance and contributions. [Q38/34/1]

Short-term use of virtual meetings is fine but I would worry about the long-term impact of this on the effectiveness of governance/governor engagement with the college. [Q38/34/8].

vi. Summary

The sum of the governance professionals' responses seems to reflect justifiable caution. College governing has adapted from face to face to online meetings out of necessity, rather than a belief that 'online' is better than or is an equivalent alternative to 'face to face'. Many governance professionals started from a personally low expertise base on online meetings to implement the required changes for online governing at a time of tension and uncertainty. It appears from the data provided that the implementation was successful to a greater or lesser degree. What is less certain is the extent to which governing has been effective using the new virtual meeting system. This will be a matter for each to college governing board to identify in its next governance review.

2.3.4. The Principals' perspective

This section looks at the responses to the questionnaire from the senior leader of colleges – the principal[2]. The principal is both accountable to the governing board and is also usually a member of the governing body as well. The principal and senior staff of the college are responsible for providing information to the governing body to enable decision making.

i. Pre-Covid Experience

Table 39: Familiarity with online meeting systems pre-Covid

	England (%)	Scotland (%)
Skype	73	100
Zoom	41	0
Microsoft Teams	55	100
Google Hangouts/ Google Meet	18	50
GoToMeeting	32	50
None	5	0

Table 40: Use of virtual meeting systems for work

	England %	Scotland %
Usually very good	18	50
Patchy, sometimes better than others	59	50
Usually frustrating	18	0
Disappointing	0	0
Never used	5	0

Table 41: Use of virtual meeting systems for social purposes

	England %	Scotland %
Usually very good	27	0
Patchy, sometimes better than others	36	50
Usually frustrating	9	0
Disappointing	0	0
Never used	27	50

Of the four categories of chairs, board members, governance professionals, and principals, principals would appear to be the most familiar with online meeting systems prior to lockdown. However, this is only a relative advantage. The responses indicate that there was a considerable degree of learning to use new systems required by the move to online working methods.

ii. Perception of online meeting experience of other players in governing colleges

Table 42: Perception of online readiness by board members and the governance professional

	England %		Scotland %	
	Board Members	GP	Board Members	GP
Already confident using online methods	14	23	0	50
Gained increasing confidence	82	73	100	50
Marginalised, resulting from the online methods	5	5	0	0
Other (please specify)	0	0	0	0

This pattern of response suggests that principals believed that most board members and the governance professional were not already expert or confident in the use of online meeting methods.

2   There were 25 principal respondents from England and 2 from Scotland.

iii. During lockdown

Table 43: Use of virtual meeting systems

	England %	Scotland %
Virtual meeting system for board meetings only	14	50
Virtual meeting system for board and committee meetings	95	100
Virtual meeting system for chair/principal/governance professional	77	50
Virtual meeting system for chair's briefing	41	0
Virtual meeting system for 'external' presenters to virtual meeting e.g. auditors, technical advisers, consultants	68	50
Virtual meeting of chairs' committee	41	0
Not at all	0	0
Other (please specify)	5	0

Table 44: Effectiveness of online governing meetings

	England %	Scotland %
Effective	86	50
Partially effective	14	50
Ineffective	0	0

Principals from England provided the following reasons for 'partially effective':

- Technical issues eg frozen screen, broadband variability (100%)
- Couldn't see all the participants (67%)
- People talking over one another (33%)

Principals from Scotland provided the following reasons for 'partially effective' as;

- Technical issues eg frozen screen, broadband variability
- Needed two screens, so I could see my online papers as well

Table 45: Experience of online meetings

No of meetings	England %	Scotland %
1	0	0
2	5	50
3	5	0
4	0	0
5	0	0
6	38	0
7	5	0
8	10	50
9	0	0
10	5	0
11 or more	33	0
none	0	0

Table 46: Agenda formation

	England %	Scotland %
The agenda is the same, just handled online	81	50
The agenda has focused on the essential items only (including Covid-19)	19	50
The agenda is dominated by Covid-19 only	0	0

Table 47 Virtual governing meeting frequency

	England %	Scotland %
No difference	41	0
slightly increased	41	50
significantly increased	14	50
slightly decreased	5	0
significantly decreased	0	0

In summary, respondents provide confirmation of the use of online meeting arrangements during the period April to July 2020. Examples are also provided of other types of online meeting associated with governing colleges such as the essential meetings of the chair, principal and governance professional.

The majority viewpoint from respondents was that online governing meetings were effective. However, reasons for partial effectiveness require recognition, particularly the technical issues encountered.

Principals report the increasing confidence demonstrated by board members with use on online meeting arrangements and indicate that, for many, the governing agenda remained the same. Many principals were required to attend additional governing meetings during the period due to Covid-related matters.

It is of note that governing agendas were adjusted to 'essential items only' more in Scotland than England from the responses received.

iv. Reflecting on the experience

The response from principals suggests a considerable degree of support for the use of virtual meetings to maintain the governing of colleges. College principals, who appear to have been more familiar with virtual meetings prior to the Covid pandemic restrictions, are encouraging for the continuance of virtual governing meetings if necessary. Table 51 shows the reported positive aspects of governing using online meetings.

Table 48; The positive aspects of governing using online meetings

	England %	Scotland %
Better governor /board member attendance	62	0
More convenient to join the meeting from home	62	50
Better focus to meetings	43	0
Shorter meetings	52	0
A sense of equality within the online meeting system	24	0
More relaxed away from the formalities of the boardroom	19	0
Other (please specify)	5	50

v. Looking to the future

This section recognises that there may be benefits from retaining some of the better aspects of online governing meetings. Many users of online meetings would recognise that the bigger the meeting attendance, the harder it is to achieve the quality of meeting that a face to face meeting of board members achieves. Thus, there may be merit in the suggestion to consider committees of the governing board for future online meetings arising from the relative success of the smaller meeting setting.

Also, in the responses, there is recognition that whilst online meetings have sustained college governing, in the future a return to face to face meetings would be preferable.

For some respondents, there is support for a blend of face to face and online in future. This could work in one or two ways:

- Schedule a mix of meetings arrangements for the governance calendar, perhaps using online meetings for shorter agendas
- At face to face meetings, permit attendance via virtual meeting systems

Table 49: Future governing meeting arrangements

	England %	Scotland %
None, I'd like to return to all the previous ways of working	0	0
None, but I support online methods in principle	29	0
I'd like to have all formal meetings online	10	0
I'd like committees to be online, with board meetings returning to face to face	29	50
I'd like strategic development events to be online in future	5	0
Other (please specify)	38	50

⟫ SELECTED COMMENTS FROM PRINCIPALS

My preference is to return to physical meetings for all board and committee meetings once it's safe to do so. I'd also say that meetings need to be either physical or virtual, not a mix of attendance. We have had some occasions pre-coronavirus where one person was absent and dialled in, this was pretty disruptive and not successful. [Q38/2/1part]

Online meetings have changed one important aspect in that we have asked for questions about papers to be asked in advance – and then college staff have provided written answers on the morning of the meeting date (which usually start at 6.00pm). This does not stop in-meeting questions, but it has helped us speed up business considerably. Presuming a return to face to face in future, will probably continue with this system. [Q38/2/2]

2.4 The story of changing from face to face meetings to online governing – two 'conversations' with governance professionals

CONVERSATION A

BY MARIANNE PHILP, DIRECTOR OF GOVERNANCE & COMPLIANCE: FIFE COLLEGE

Thinking back to March 2020 and the lockdown conditions, what were your first thoughts about the governing of your college?

I think there was a bit of naivety initially in that we thought lockdown would only last around 3 months and that we would then go back to normal! Initial thoughts were that Board and Committee meetings could perhaps be cancelled assuming there were no urgent approvals required. However we quickly changed our views and considered it important to continue to progress normal business, albeit in a slightly different way.

How did you get ready for your first online college governing meeting? What was it?

Fife College closed for lockdown on Friday 20 March 2020, with our first Board of Governors meeting scheduled for Wednesday 25 March 2020. We quickly agreed that it should go ahead rather than be cancelled, and that we would use Microsoft Teams. Fortunately, our Board members had previously been issued with College iPads to access papers electronically via the Staff Gateway and Teams

was already installed on these. We prepared guidance notes for Board members to help them log on for the meeting, and to advise on protocols for online meetings.

A few board members were very nervous about how the meeting would go (as was I!) and we had several one-to-one practice calls to test using Teams and build confidence with those members who wanted some additional reassurance and support.

How did the first board meeting go?

Surprisingly well! Almost all members managed to log on with no technical issues and engaged well with the discussions. Board members were very supportive of all that management were doing to support learners and staff and keep business progressing to plan. With hindsight, it was probably good that everyone was expected to log on at the start of lockdown and just get on with things. It gave us reassurance and confidence that governance could continue.

What have been the pleasant surprises about online governing?

Apart from the initial few weeks where board members were

juggling work emergencies and diaries were a bit unpredictable, attendance has overall improved at meetings.

There has been a conscious effort by Chairs to keep meetings to the allocated time and not let them overrun as members can become tired. This has resulted in meetings being more focussed and priorities addressed early on the agenda.

We have had no major issues with technology or the network, which means our confidence has grown significantly in having online meetings.

What have been the concerns? How have you tried to overcome any emerging problems?

Some of our newer board members have had to participate in induction online and have had very limited opportunities to meet new board members due to the timing of their appointments. Some have commented that it would be nice to meet their colleagues face to face as building relationships has been more difficult for them. We have accommodated one-to-one meetings or appointing Board mentors where individuals have

expressed an interest in this type of support and I think this is largely resolved.

A few board members initially were not confident in using their iPads and dialling in to meetings – however all technical and/or training issues have now been resolved and members are now confident about dialling in and participating fully.

Do you think online virtual meetings can be a sustainable method for governing a college?
Yes I think there are huge benefits for us in continuing online meetings, especially for shorter meetings. It helps keep discussion focussed and

attendance has improved and may help to increase the diversity of board members longer-term. I think there may be some merit in having face-to-face meetings – especially at Strategic Planning and Development days – to allow for networking, team building and informal discussion. However members should feel able to dial in to any meeting where they could not otherwise attend or if they would simply prefer to do this whatever the reason.

In the past, we have used email to accommodate emergency business where this has been a single, straightforward item. However again as an improvement I think having a short online virtual meeting would

be an excellent substitute for this as it allows members still to discuss the issue and share views.

What are your top three tips for successful virtual board meetings?
1. A well organised agenda, having the key items early in the meeting
2. Well prepared and set-out papers, minimising time at the meeting for explanation and increasing the time available for questions, discussion and decision-making
3. Setting protocols out clearly before the meeting, so members understand how they can engage and participate fully

CONVERSATION B

BY ALISON SHILLITO, GOVERNANCE ADVISER & CLERK TO THE GOVERNING BODY: THE SHEFFIELD COLLEGE

Thinking back to March 2020 and the lockdown conditions, what were your first thoughts about the governing of your college?

My first thoughts were to prepare for a short period of whole or partial premises closure and/ or governors or myself being unavailable due to illness or quarantine. I thought we might need to postpone or rearrange meetings, use alternative decision-making procedures (written resolutions Chair's Action) for urgent matters; have a buddy relationship with another clerk (in case I was indisposed) and possibly try some form of videoconferencing in the event that we couldn't convene a meeting in person. On the day we closed, I suddenly thought that this could be a long haul and packed my desk into a box (monitor, key board and mouse and some documents).

How did you get ready for your first online college governing meeting? What was it?

Our first online meeting was Finance, Employment and General Purposes Committee (FEGP) in April so we had time to prepare.

In the first week of lockdown, the new Governance and Projects Officer started work with the Chair and a couple of enthusiastic governors on trying out different videoconferencing solutions: — Skype, Teams, Zoom and Google hangouts. The governors all used different equipment at home and based on the trial, they chose Zoom. It seemed to be preferred for ease of use and online experience. The College bought some licences for the Executive Office. There was a bit of uncertainty that it was too easy to use but the IT Team gave us advice on security settings. Zoom subsequently improved security settings.

The Governance and Projects Officer, the Chair and I put together a Zoom user guide for members. We circulated the guide and offered members a trial zoom session to test their home set-up. Some members did this, others surprised me saying they had been using zoom for ages and were quite proficient.

Also quickly after lockdown, I worked with the Chair on making changes to the Instrument and Articles for video or teleconference meetings, written resolutions and a short-term reduction in the quorum (which was never used).

In planning for FEGP, I amended the running order of the meeting to make it shorter than a face-to-face meeting and built in a break at the 45/50 minute mark.

I set up a Google form for feedback and added the link to the agenda to make sure there was a route to collect and analyse feedback. I expected a lot of feedback but got very little.

How did the first board meeting go?

At the end of the meeting, members commented that it had gone much better than expected. Members said that timings and length of agenda needed to change for online meetings. In addition, members wanted to know that the things they put in the chat would be picked up in the minutes and/or actioned. This raises questions for those matters that were not actually discussed in the meeting. I found it difficult to take notes, share documents and keep an eye on the chat but the Chair of Governors and the Chief Executive in particular were very good at raising and summarising chat comments in the meeting.

What have been the pleasant surprises about online governing?

It has been a pleasant surprise that attendance has remained high. Governors have engaged and persevered with online governor meetings. Some

governors have been part of dismissal appeal panels conducted online, they have engaged in online training and networking events and logged into staff celebration and awards events. I envisaged that some governors would have technical problems with IT and web access but, thankfully, this has been quite rare. On all but one occasion, together, we were able to fix the issue and enable the member to join/re-join the meeting. For some members it has meant being able to participate in meetings or training that would not have been feasible in person.

What have been the concerns? How have you tried to overcome any emerging problems?

It is difficult for the Chair to pick up micro behaviours, particularly in full Governing Body when there are 25 people or more on the call. Equally, it is difficult for members to catch the Chair's eye. The chat function is good but, as above, it can create a grey area of board discussion.

Our paper packs are electronic PDFs so as well as viewing the Zoom, the chair and members are probably trying to move between multiple screens – board pack, Zoom gallery and chat. I am lucky; my last minute decision to take home my monitor means I have two screens. Many governors are working off a single screen, some

just a tablet. This raises an issue of how we equip our governors.

My internet connection has not always been very good (with three adults working from home). I dread the "your internet connection is unstable" message even though by the time it pops up my screen has probably already frozen. Normally, I can overcome this by switching the video function off and on again and closing down some windows.

I think members miss meeting with each other. Governing is a collective endeavour. Governors most frequently come to the college to attend meetings. The most engaged governors enjoy coming to college; they enjoy the informal start and finish of meetings when they catch-up with members of the Executive and talk about what is happening at college and in the sector. You lose this with virtual meetings and members do not always want to socialise via more screen time. Those members who like to do so tend to join the Zoom 15 minutes early to have that informal time but it is not easy to replicate the companionship that governors have.

Do you think online virtual meetings can be a sustainable method for governing a college?

Yes, I think we could make it sustainable and will retain some aspects online operation. We need to consider what aspects

of remote working should be developed and made routine for governing. I think it makes sense for governor induction, regional training, webinars and some networking meetings to be online. It can make task groups and committees easier to arrange. Using a mixed mode of governing (online and in person) poses a different set of issues but may be useful to enable working governors to attend more meetings that they can't attend in person. We may be able to attract different people who have not previously expressed interest.

If online meetings were to become the sole means of governing, I would be concerned that we would lose one of the attractions of being a college governor (fostering the feeling of belonging to a team, a common purpose and the College).

What are your top three tips for successful virtual board meetings?

1. Agenda break – plan a break and use it.
2. Arrange support – ideally, have someone else in the meeting who can share screen and do other technical things like admit people to the meeting, keep a check on who is there and log chat.
3. Get two screens (or three): advise members to try to arrange access to two screens if possible – one for their papers and one for the Zoom.

2.5 Other experience of using online methods to support college governing

In order to put the above picture into a wider context, respondents were asked to reflect on other experiences of using online methods to support governing. The following table shows the responses from chairs and board members.

This section is intended to show that online methods were already being used by many board members to support their contribution as governors. Approximately 75% of respondents from England and Scotland respectively informed that they had used online technology to support college governing ie attending webinars, undertaking specific training such as safeguarding awareness, board member induction, informal board member link-ups which might include mentoring and/or working groups.

Reflections on the use of such experiences are generally positive, described as 'good'. However, there is some room for improvement from the pattern of responses received.

Table 50: Range and experience of using online methods to support governing (beyond virtual meetings)

	England %	Scotland %
None	20	23
Yes, for induction training	16	20
Yes, for occasional webinars	57	45
Yes, for specific training e.g. safeguarding	49	20
Yes, for informal governor link-ups	25	23
Yes, Other (please specify)	9	18

Other examples included regular (weekly) meetings of committee and Board chairs with senior staff, interviews for governance professional (college secretary), an appeal committee, task and finish groups, forum for woman board members, performing nominated governor for safeguarding role.

2.6 National similarities and differences

The responses to the questionnaire show a considerable number of similarities between England and Scotland. This is not surprising as there are many similarities in the processes of governing colleges in England and Scotland.

The key differences, which may be part of the same issue, are in perceptions of governing effectiveness reported by chairs (83% Scotland; 74% England). This perceived difference in the effectiveness of online meetings could be connected to another difference – meeting agenda formation. 76% of governance professionals reported it stayed the same in Scotland, 42% of governance professionals reported the agenda stayed the same in England. Thus, if college governing boards in England received an adjusted agenda (greater or reduced), this may account for chairs feeling that meetings were not as effective as they could be. Depending on the extent to which agendas varied from the norm to focus on Covid-related priorities could account for a sense of concern about the effectiveness of online meetings.

A second and possibly additional interpretation for the difference might be that adjusted agendas reduced the opportunity for discussion and debate.

Table 51: Similarities and differences between response from England and Scotland

	ENGLAND	SCOTLAND
Similarities		
Change in use of Microsoft Teams by Governance Professionals	56% change in use of Microsoft Teams by governance professionals from before lockdown to during lockdown From 25% familiarity before lockdown to 81% usage during lockdown	55% change in use of Microsoft Teams by governance professionals from before lockdown to during lockdown From 35% familiarity before lockdown to 90% usage during lockdown
General experience of using technology to support governance (Governors)	Of those Governors who had other experience of using technology to support governing colleges the majority rated their experience as 'good' (60% – 76%)	Of those Governors who had other experience of using technology to support governing colleges the majority rated their experience as 'good' (50% – 80%)
Convenience of virtual meetings	Chairs and governors believed the most enjoyed aspect of virtual meetings to be 'more convenient to join the meeting from home.'	Chairs and governors believed the most enjoyed aspect of virtual meetings to be 'more convenient to join the meeting from home.'
Future governing meeting possibilities – Principals and Chief Executives	Principals and Chief Executives supported retaining committees to be online with boards returning to face to face meetings.	Principals and Chief Executives supported retaining committees to be online with boards returning to face to face meetings.
Future governing meeting possibilities – Governance professionals	Governance professionals supported retaining committees to be online with boards returning to face to face meetings.	Governance professionals supported retaining committees to be online with boards returning to face to face meetings.
Frequency of governing meetings during April – July 2020	36% of governance professionals informed that the frequency of governing meetings stayed the same, 45% reported that the frequency slightly increased.	42% of governance professionals informed that the frequency of governing meetings stayed the same, 42% informed that the frequency slightly increased.
Differences		
Perceptions of effectiveness	74% of chairs believed online meetings to be effective	83% of chairs believed online meetings to be effective
Prime reason for less than successful meetings	Of the reasons for ineffective or partially effective virtual meetings, 'needed two screens so I could see my papers' (62%) was the most significant concern	Of the reasons for ineffective or partially effective virtual meetings, technical issues eg broadband variability, frozen screen (89%) was the most significant concern
Impact on the formal governing meeting agendas	42% of governance professionals respondents informed that the meeting agenda had stayed the same.	76% of governance professionals respondents stated that the meeting agenda had stayed the same.

3 THEMES, DISCUSSION AND LITERATURE

3.1 Participation and Diversity

One of the reported benefits of online college governing has been the increase in governor attendance. Approximately 2/3 of governance professionals in England and Scotland stated that governor attendance had increased. Chairs, governors, governance professionals and principals recognised the increase on governor attendance.

At the same time, there were reports in comments added to the questionnaire where some governors felt marginalised by the move to online governing arrangements. This may have been technical and/or process reasons. There was concern expressed by one governor at the loss of the student governor from attendance at governing meetings during April to July 2020.

On the plus side and looking to the future where face to face meetings may be permitted again, some boards may seek to use new meeting arrangements which may include online meetings to extend the diversity of board membership. Whilst being an under-researched area, there may be potential college governors who are prepared to commit to the governor role if the role can, in part, be achieved online. Further consideration of a study by Dobson and Rose (2019) to extend governor membership of primary schools in England using technology is referred to in Section 3.3 below.

A further aspect of improving the diversity of governing board membership using the benefits of online meeting may address the concerns some potential governors may have about the 'culture of the board room'. For some, there is a perception of a more relaxed, socially equalised experience of participating in online meetings. If the college governing board demonstrates a modernity and an openness by using online meeting arrangements, this could stimulate a wider interest in serving as a college governor.

Whilst most college governing boards have expenses policies, there may also be a perceived benefit from not needing to travel to the college on a frequent basis for governing board meetings if more online meetings become part of the method of college governing decision making.

In summary, from the reported evidence of improved attendance at online board meetings, there may be scope to improve the diversity of board membership by building on the online experience of governing to date. However, care would have to be taken to ensure potential board members are not discouraged as a result of online working methods. Online governing has the potential to work either way – improve board diversity, restrict board diversity. Suffice to say that on the reported evidence of the period April to July 2020, there is scope to benefit the governing of colleges.

3.2 Widening governor recruitment: a study

Another reported feature of the recent use of virtual meetings for governing colleges by respondents is improved attendance by board members. Of relevance is a recent paper by Dobson and Rose (2019) who looked at a small-scale project in England designed to improve school governor recruitment and participation using remote attendance. 'Remote attendance' in this context means that a governing board meeting would be a mix of those governors present and face to face, and some governors present by virtue of WebEx sound and vision technology.

The research study considered the experience of four schools in England where governors joined the governing board meetings using virtual meeting technology. The motivation to innovate in this way is given as:

> **" key stakeholders at all four schools wanted to appoint an IEB (independent, external, business-based governor) who would attend meetings remotely because they were struggling to fill governor vacancies. This was because the schools were located in rural and not particularly affluent areas with few skilled professionals wanting to take on a governor role'.**

To a significant degree, the project was successful. A chair of a governing body is reported as stating: 'we found ourselves with two very highly skilled governors who were able to ask quite pertinent and quite challenging questions' (2016;5). Furthermore 'all schools felt that their IEBs had raised the confidence of their GB'.

Dobson and Rose reported 'the fact that IEBs did not have to attend governing body meetings in person meant they were much more likely to attend virtually …' (2019;6).

However, there were some significant lessons identified arising from this project

(i)   Expectations for the IEB and school need to be clear, especially would there be any circumstances when the IEB would attend school.

(ii) Arrangements for governor induction and governor development in the light of (i) above.

(iii) The reliability of technology as it was noted 'all five IEBs and their schools experienced different degrees of problems with the technology designed to engage them in governing body meetings'. (op cit; 6)

Dobson and Rose report that 'the barriers to engagement (as a school governor) experienced by IEBs meant, as a whole, the IEBs attending meetings remotely did not settle into their roles as quickly or as effectively as the other IEBs' (op cit;7)

Two further matters of significance are reported on arising from this study. Firstly, the difficulty in building a relationship with a remote governor. A chair informed '… it's quite difficult to get to know them (IEBs) because obviously you don't see them before meetings and after' (op cit;8). Secondly, where IEBs did settle into their roles more successfully, a key variable was the relative proximity between their home and the school. The ability to attend some meetings in person and undertaking school visits helped to achieve a productive working relationship between governor and school.

3.3 Green IT: the benefits of governing without driving?

Arnfalk et al (2016) reported on an aspect of the use of virtual meetings identified by some respondents to the questionnaire – the use of virtual meetings for environmental benefit.

The paper by Arnfalk et al looked at the consequences of using virtual meetings as working practice in 20 public agencies in Sweden and, importantly, the impact on travel, environment and climate by the use of virtual meetings. Looking at travel data per employee (the study looked at workers, rather than board members) over a four year period, findings suggested that CO_2 emission from travel per employee decreased by 10% where employees used virtual meetings rather than travel to a meeting ie a business trip.

However, Arnfalk's paper reminds that any environmental gain from not travelling maybe be offset by whatever activities such travel time is replaced by. Thus, if travel to work is replaced by eg certain types of retail, the environmental gain maybe negated.

3.4 Wider Perspectives on Electronic Initiatives in Corporate Governance

Sharma et al (2018) report on the use of 'electronic initiatives in corporate governance' in India. The study looked at the opinions of shareholders and company secretaries to a range of electronic initiatives introduced by the Indian Ministry of Corporate Affairs including:

- Electronic delivery of documents
- Virtual shareholder meetings
- Virtual board meetings
- Electronic voting

Sharma et al note '… the initiatives are not hassle free and a lot of things need to be taken care of in order to have a smooth implementation of electronic initiatives' (2018;25).

Importantly, Sharma et al highlight the importance of a policy objective. Thus, eg what is the objective for the introduction of collaboration technologies? The response might include:

- Improving attendance of governors
- Improving diversity of governor composition
- Improving the effectiveness of governing board decision making
- Reducing carbon footprint

Establishing a policy intention at the outset permits a structured approach to the use of systems and a focused evaluation of performance.

Sharma et al look at the case for hybrid meetings versus remote-only meetings. Respondents to the CDN/AoC questionnaire showed some interest in a 'blended approach' in the future where blended for some was a hybrid of some governors present and some connecting to the meeting by technology, blended for others meant some face to face meetings, some remote meetings.

Sharma quotes Fontenot (2017) 'the choice of meeting (virtual only or hybrid) should be determined by the companies not only on the basis of law but also the circumstances of the company including its capabilities, resources, shareholders sentiments, and the availability of technology'. The lesson for colleges is one of care and reflection in selecting an approach to the governing practices and regularly monitoring and responding to opinion from college governors, college senior staff and the governance professional.

3.5 Online isn't the same as Face to Face: Testing the effectiveness of college governing

The following comment was supplied by a governance professional *'Short-term use of virtual meetings is fine but I would worry about the long-term impact of this on the effectiveness of governance/governor engagement with the college. [Q38/34/8]'*. At the heart of this comment are a number of facets that contribute to effective governance which will be explored below

> The comment recognises that moving the governing of colleges to virtual meetings resulted from necessity imposed by the Covid lockdown conditions. Thus, the new meeting arrangements hadn't resulted from a period of trial or experimentation, they were a necessary way forward… for the time-being.

> Another comment supplied with the questionnaire responses was *'I think difficult discussions are much harder to handle online than face-to-face and what we've been doing is emergency remote governing. [Q38/12/10part]'* highlights the slightly artificial nature of online meetings whereby there maybe a tendency to believe process is the same as effectiveness. The bigger the meeting, such as a board

meeting, it is probable that the less likely that a challenging, exploratory, testing, discussional meeting will take place because virtual meeting arrangements do not enable such experiences. In some cases, not all participatory faces can be seen thus preventing any sense of reaction to issues presented.

> Body language and collective mood in a face to face meeting do not transfer to an online meeting. This reality has to be recognised and, if possible, compensated for.

> Agendas that may last beyond two hours may suit face to face meetings which, in some cases, may be supported by refreshments and the collective energy of the meeting event. Simply

transferring such agendas online may become an uncomfortable experience to sit through. Again, this aspect of college governance has to be recognised and worked with to overcome problematic circumstances.

> A further point arising from quote at the start is the matter of board member engagement with the college. Since March 2020 it is probable that most, if not all, board members will not have entered a college building and will not have encountered students and staff. Remote governing can therefore lead to the distance between board members and that which they are governing becoming too great. Should online governing continue, ways to connect the college to board members will have to be created.

4 'BEST PRACTICE' FOR VIRTUAL MEETINGS

a. An early study of the use of online meetings

This section draws upon early advice for online meetings and was published in 2000. There are observations and advice arising from this work which are still relevant today.

Mittleman et al (2000) described experience of facilitating about 100 meetings for the U.S. Navy and other related organisations. These meetings[3] included planning, decision making, collaborative writing, training, and expert briefings. Mittleman provide eight lessons of relevance to the governing of colleges N.B. the ninth lesson considered issues arising from meetings across different time zones which may be relevant and is much easier to accommodate in 2020 than 2000.

The following table has been created from Mittleman et al's text (pages 8-13) with added text from the report author for relevance and interpretation.

Table 52: Applying lessons learned from a study by Mittleman et al.

Some Lessons Learned by Mittleman et al	Suggested Practice to Address 'Lesson Learned'
1. **It is harder to follow a meeting process from a distance.** 'Different place meeting participants have greater difficulty than same-place participants at following the process of the meeting'. 'Different-place participants are more prone to distractions. It is tempting to try to read email, catch up on unrelated work, or engage in social activity while keeping an eye on the meeting'.	• Plan the meeting in more detail than would typically be the case for same-place meetings. • Timing agenda items may assist with the meeting process. • Allow for 5-minute breaks every hour. • The chair's ability to ensure collective focus is clearly under test and so the Chair's hosting technique should be emphasised rather than assumed.
2. **People don't get feedback when working over a distance** This point recognises that communication through technology can be limiting and frustrating. Mittleman et al noted that meeting attendees 'can become observers rather than participants'.	• The chair needs to directly seek feedback from attendees on aspects of the agenda. • Process checks can help keep the group together eg Mary, do you agree with the general viewpoint or do you see it differently? • Encourage the use of the chat facility and to integrate the points raised into the meeting.

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3   The meetings system used in this study was called GroupSystems GSS.

Some Lessons Learned by Mittleman et al	Suggested Practice to Address 'Lesson Learned'
3. People forget or may not be sure who is at a distributed meeting	• Encourage the practice of using names of attendees when chairing. • Remind participants who is at the meeting – perhaps after a comfort break. • Perhaps photos and brief biographies could be circulated with the papers for the meeting.
4. It is harder to build a team over a distance	• Chairs should confirm the purpose of the meeting – an overview, with an emphasis on key items on the agenda and why. • Face to face meetings at some stage can help the development of a collective team trust and confidence. • Include, indeed encourage a period of the time together to be for informal chat; this could be achieved by using sub-divided arrangements for smaller group discussion which technology can facilitate via breakout rooms.
5. Network connections are unpredictable	• Some respondents to the AoC/CDN questionnaire referred to various technical difficulties. The advice would be to make sure: (i) all users are familiar with the system in use (ii) all users know what to do in the case of a problem e.g. a phone number for the governance professional (iii) open up the meeting 15 mins earlier to test sound/webcam/functions etc
6. It is harder to converge over a distance This is a point made by some comments from AoC/CDN questionnaire respondents ie reaching a decision or resolving a difficult topic is harder online than face to face.	• The Chair should emphasise the convergence process ie sum up views for and against to enable decisions or preferences to be clearly achieved. • The Chair should connect discussion to the report recommendation if available. Report writers should assist meeting participants by providing clear, sharply focused reports. • The Chair could use functions within the technology such as polls to engage, test opinions, check thinking etc.

b. Current advice and 'good practice' for virtual meetings

Building on that advice from 2000, much of which is still very relevant today, is the recent publication from ICSA, the Chartered Governance Institute (2020) titled 'Good practice for virtual board and committee meetings'. This document is particularly valuable for the chair and the governance professional, but actors involved in college governing boards ie board members, senior staff, professional advisers, would benefit from being familiar with this timely document.

In summary, the advice includes (paraphrased):

- Select the communication technology with care, appreciating its functionality
- Make sure all attendees are confident about joining the meeting and how to use basic functions
- Virtual meetings need to be well-structured and recognise the constraints of technology
- Preparation is very important, especially for the chair and governance professional to ensure focus and clarity for the meeting
- The chair will need additional techniques to achieve an effective, inclusive meeting with clear outcomes
- Protocols for attendees should be developed and circulated in advance.

5 RECOMMENDATIONS

The following recommendations for action are presented with the intention of improving the effectiveness of online governing meetings and associated activities. The lettering suggests where led responsibility for the recommendation might rest (✔) and also indicates other roles which can contribute to the recommendation (●).

	Recommendation	Chair	Govs	Gov Prof	Prin
R1	Ensure that all governors and senior staff are able to participate in online governing with confidence. So, consult all governors and senior staff about their experience to date of using online meetings for board and committee meetings.	●	●	✔	
R2	Learn more about the facilities available within the online meetings operating system that is in use at your college. You may discover ways to use the system eg break-out rooms, increasing the number of faces on the screen, use of chat functions for summaries, use of polling, which could assist governing processes and/or improve the overall experience.			✔	
R3	Review the nature of the agenda and how it is presented.	●		✔	●
R4	Review reporting writing to ensure the purpose of the report is clear.			●	✔
R5	Consider whether to increase the frequency of board or committee meetings so that the annual governance workplan can be achieved without long meetings with a large number of items.	●		✔	●
R6	Build in break time into the agenda – either at an appropriate place within the agenda or simply after 60 minutes.	✔	●	●	
R7	Become the active host of the meeting with the aim of keeping the meeting together eg process checks with all governors, regular summing up of discussions and viewpoints verbally and in the chat function, emphasising decision points and asking for evidence of consensus.	✔			
R8	Consider using breakout rooms so all have an opportunity to discuss items, engage actively in governing and build relationships.	✔	●	●	
R9	Discourage talking through reports or lengthy presentations by senior staff (which can also be problematic in face-to-face meetings). This practice takes up precious time and can be very demanding on concentration.	✔		✔	✔

Recommendation		Chair	Govs	Gov Prof	Prin
R10	Develop a protocol for virtual meetings as an annex for Standing Orders.	●	●	✔	
R11	Consider how to use the chat facility to greatest benefit for the meeting. Does the chair also need to oversee the chat contribution, or is this a co-ordinating role for the vice chair… or governance professional?	●		✔	
R12	If online governing is required for some time in the future, consider ways to bring college life to governors (but not to use up time in board or committee meetings).			✔	●
R13	Regularly and frequently review the effectiveness of online governing meetings to ensure such meetings achieve outcomes rather than simply satisfy a process.	●	●	✔	
R14	A principal replying to the questionnaire referred to a trial of a method to assist online governing meetings – asking for board member questions about written reports in advance of meetings. College senior staff provide answers to questions on the morning of the governing board meeting. This approach could help the focus of meetings – worth a try…	●	●	●	✔
R15	For the use of virtual meetings more widely than formal meetings, it may be worth considering the advice by Cleary (2020) in *'How to cope with Zoom fatigue'* including remembering the value of a traditional phone call, avoid online meetings every day, remembering to agree a screen break time, carefully balance your use of work and personal online meetings.	●	●	✔	●

6 CONCLUDING COMMENTS

This is a simple and, in many ways, an inspiring account of a significant change in a method of working to meet the responsibility of governing a college at a time of pandemic.

There wasn't an option to furlough or pause the governing of colleges. Institutions required continuing governance oversight to meet responsibilities to students, staff, stakeholders together with public and private funders.

So, from a relatively low base of prior experience, chairs, board members, governance professionals and chief executives/principals embarked upon governing using virtual meeting technology.

The biggest journey for changing working practices was typically for the governance professional and some board members.

From the two countries studied in this survey, the overall view was:

The response from the various categories reviewed showed 79% – 100% support for the statement: 'the use of virtual meetings has been a constructive and positive development to support governing'

[SCOTLAND]

The response from the various categories reviewed showed 88% – 97% support for the statement: 'The use of virtual meetings has been a constructive and positive development to support governing.'

[ENGLAND]

Given the variety of respondents from a range of settings across two countries within the UK, this is a reasonably consistent picture. Clearly all the players involved in governing a college including chairs, board members, the governance professional, chief executive/principal and senior staff have, with effort and commitment, applied themselves to a new and necessary way of working (governing) for the best interests of their college students, staff and stakeholders.

The necessity to hold virtual meetings in the future remains uncertain at the time of writing in September 2020. However, two points of principle have emerged. Firstly, virtual meetings should not be seen as a simple substitute for face to face meetings. Whilst there are aspects of virtual meetings that many respondents have enjoyed, there is recognition that the nature of governing may have adjusted to suit the new medium. Questions of governance effectiveness using virtual meetings remain a concern in the longer term.

Secondly, based on this view that face to face governing meetings can be better at achieving a stronger governing performance, and at the same time recognising the usefulness of virtual meetings, there is a case for utilising 'blended methods' in the future – blended in one of two or both senses.

(a) A mix of meeting formats – maybe committees using more virtual meetings, maybe a mix of virtual meetings and face to face to face meetings for the board.

(b) Achieving presence at face to face meetings by a mix of face to face and virtual methods.

These are decisions that each board will take in the light of their recent experience.

It is hoped that the advice provided in this report can ensure that any continued use of virtual governance meetings will be as productive as possible for the students, staff and stakeholders of our colleges.

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