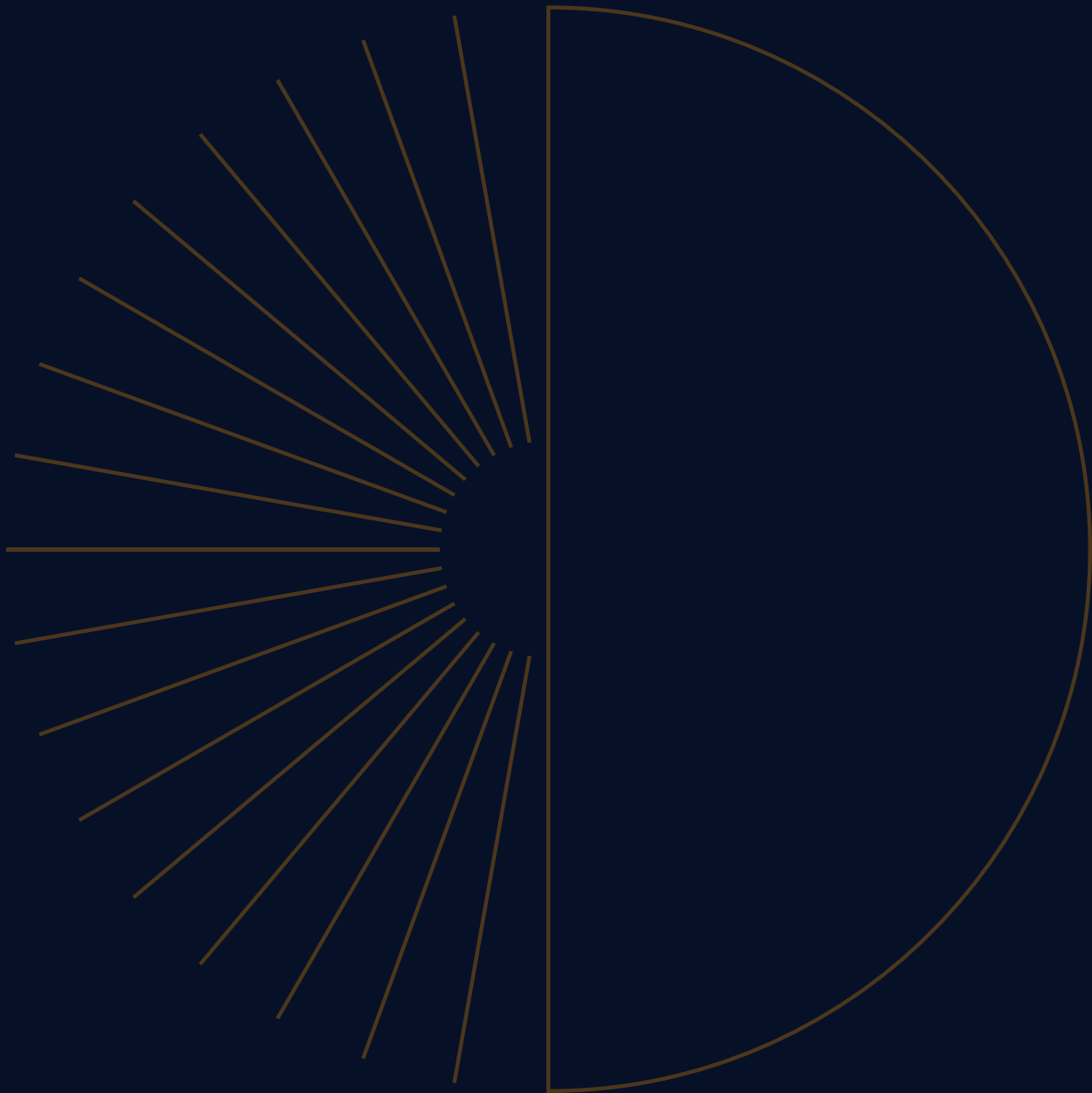


White paper

# Advancing Governance and Engagement Through a Comprehensive Approach to Member Meeting and Election Technology





# Executive Summary

Member meetings are the cornerstone of effective governance in associations, providing vital platforms for shaping organizational direction, fostering informed decision-making, and driving member engagement. These gatherings empower members to voice opinions, hold leadership accountable, and contribute meaningfully to their association's future.

As the world evolves, associations face growing challenges in ensuring inclusivity, transparency, and compliance in their governance processes. The rise of hybrid and virtual meeting technologies has created new opportunities to enhance participation, accessibility, and trust while addressing these challenges.

This white paper explores strategies to advance governance and engagement through innovative approaches to Annual Meetings, General Assemblies and House of Delegates, as well as secure election technologies. By embracing versatile meeting formats—hybrid, virtual, and in-room—and leveraging advanced tools, associations can foster inclusivity, transparency, and compliance while building trust among their members. Supported by insights from association leaders and technology experts, this white paper provides practical solutions to ensure robust and transparent decision-making processes in a rapidly changing world.



# 1. The Role of Member Meetings in Governance

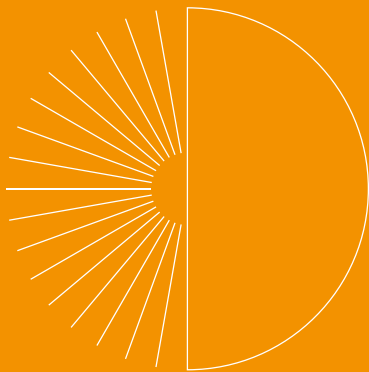
Member meetings are fundamental to association governance, decision-making, and engagement. As the sector embraces hybrid and virtual formats, these meetings provide unprecedented opportunities to drive inclusivity, transparency, and meaningful participation in critical decisions, such as elections and policy votes.

Key benefits of modern member meeting formats include:

- **Expanded Capabilities Across Formats:** Whether fully in-room, hybrid, or virtual, each meeting format offers unique advantages. In-room meetings excel with advanced speaker queuing and secure voting technologies, while hybrid

and virtual formats enable broader participation from geographically dispersed members.

- **Increased Accessibility:** Hybrid meetings ensure all members, regardless of location, mobility challenges, or scheduling conflicts, can engage in governance decisions, reinforcing inclusivity and representation.
- **Boosting Member Engagement:** Flexible meeting formats often lead to higher participation rates by removing traditional barriers like travel costs and time constraints, enabling meaningful involvement from a wider membership base.





- **Balancing Interaction and Convenience:**  
Organizations like the National Association of Realtors® (NAR) demonstrate the power of hybrid formats, combining the engagement of in-person interactions with the practicality of virtual participation.
- **Improving Decision-Making Through Broader Input:**  
Hybrid formats support enhanced pre-meeting preparation through virtual focus groups or webinars, ensuring discussions are informed and inclusive.
- **In-Room Excellence:**  
In-person meetings remain a vital option, offering operational efficiency and deep engagement through tools like seamless agenda management, secure voting, and professional facilitation.

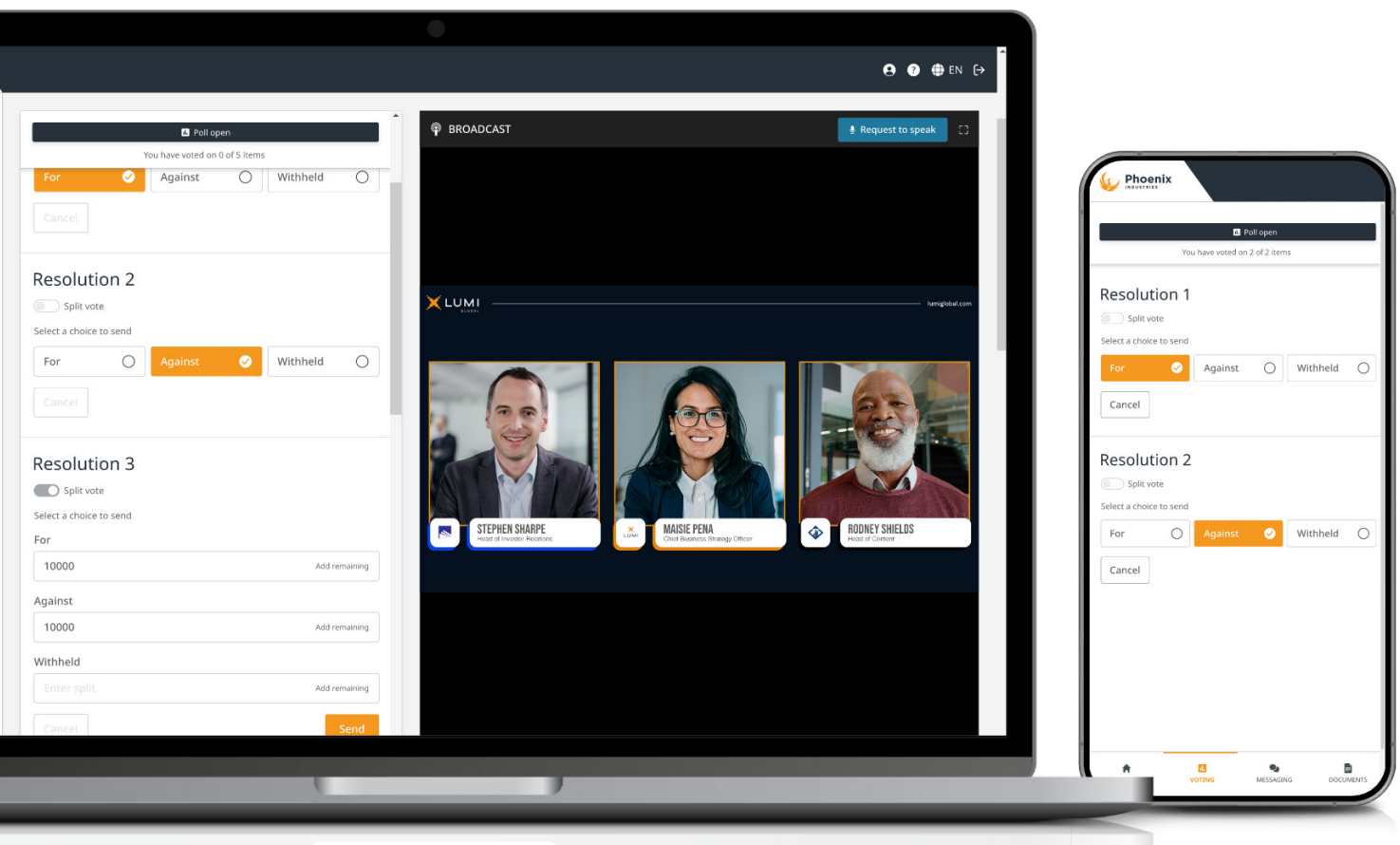


While our members love attending meetings in person, we've learned that hybrid meetings have allowed more voices to be heard, ensuring decisions reflect the collective input of our entire body."



**Kate Moore**

Vice President of Member Experience at the National Association of Realtors





## 2. Leveraging Technology for Governance and Compliance

Technology is a cornerstone for supporting associations' governance needs, ensuring inclusivity, compliance, and trust across hybrid, virtual, and in-room meeting formats. By leveraging the right tools, associations can enhance accessibility, secure data, and provide seamless member experiences.

Key benefits of governance technology include:

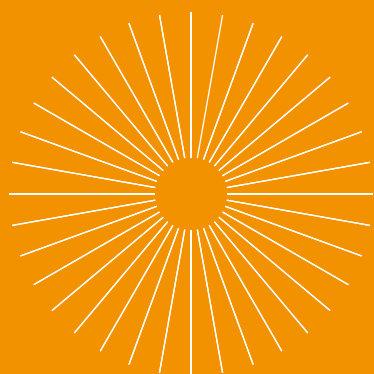
- **End-to-End Verifiability for Elections:**

Simon Bryan, Managing Director at Lumi Global, explains, "A voting platform needs

to be able to prove a three-step process: one, a ballot has been cast as intended; two, those votes have been received in the same way they were cast; and three, ultimately, those votes are counted in the same way as they were received." This rigor ensures election integrity across all formats.

- **Data Security and Compliance:**

Advanced encryption and secure data storage protect sensitive member information and ensure adherence to regulations such as GDPR or CCPA.







- **Comprehensive Audit and Reporting:**  
Real-time reporting, anonymized voter data, and rigorous compliance features—such as penetration testing and certification audits—build transparency and trust.
- **Seamless Integration with Existing Tools:**  
Modern platforms integrate smoothly with CRMs, email marketing tools, and other association software to reduce administrative effort and improve efficiency.
- **Enhanced Member Engagement:**  
Interactive features like live Q&A, real-time polling, and equitable access to debate for virtual attendees maintain inclusivity and encourage active participation.
- **Optimized In-Room Features:**  
Speaker queuing and instant voting technologies streamline physical meetings, ensuring efficiency and professional delivery without manual processes.



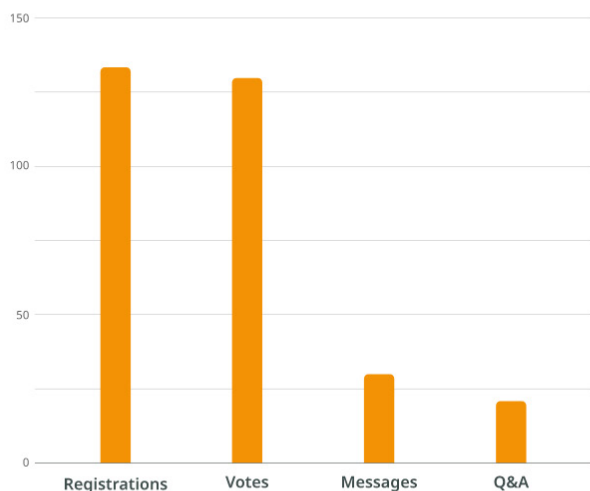
Technology is at the heart of effective governance and engagement, ensuring compliance, trust, and inclusivity—whether members are joining in person or virtually. Picking the right partner to deliver this experience can make all the difference.”



**Sylvie Harton**

Chief Business Strategy Officer  
Lumi Global

### Overall AGM response report



### Votes by attendees report

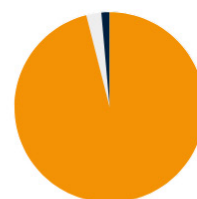
Representative visuals based on exported data

Name	Date/Time
Heather Browning	14:04 / 22/10/24
Bethan Monroe	14:01 / 22/10/24
Rosalind Stephens	14:00 / 22/10/24
Curtis Daniel	14:00 / 22/10/24
Tamzin Shah	14:02 / 22/10/24

### Final voting result

To receive the report & accounts

95% For 3% Against 2% Abstain





### 3. Engagement Strategies for Meetings Across All Formats

Effective engagement strategies are essential to foster inclusivity and active participation in hybrid, virtual, and in-room meetings. By tailoring approaches to each format, associations can create seamless and meaningful experiences for all attendees.

- **Hybrid Engagement:**

- Acknowledge virtual participants by recognizing their numbers and rotating speaking opportunities between in-room and online attendees to build inclusivity.
- Ensure visual equity with AV technology that displays both in-room and virtual participants equally, avoiding the perception of a “two-tier” meeting structure.
- Use interactive features like live polls, chat functions, and breakout rooms to maintain engagement throughout the session.

- **In-Room Engagement:**

- Leverage tools like speaker queuing and live voting to streamline participation and enhance decision-making efficiency.
- Provide advanced display solutions for real-time visibility of discussions and voting outcomes, ensuring transparency and clarity.

- **Universal Preparation and Follow-Up:**

- Distribute pre-meeting materials, instructional guides, and host “test your tech” sessions to familiarize attendees with platforms and processes, regardless of their attendance format.
- After the meeting, share recordings, key takeaways, and action items to ensure all participants remain informed and connected



Virtual attendees should not only actively participate in the decision-making process during member meetings but also have full access to meeting materials and the opportunity to engage in meaningful debate.”



**Simon Bryan**  
Managing Director,  
Lumi Global



## 4. Building Trust Through Transparency

Transparency in processes, particularly elections, is vital for fostering trust within associations.

- **Compliance Measures:**

Engage parliamentarians for major meetings and partner with audit firms to ensure election integrity. Adhering to well-documented processes reassures members of the fairness and validity of outcomes.

- **Member Communication:**

Clearly outline voting procedures, provide candidate bios, and offer reminders to encourage participation. Regular updates on the progress of election processes and outcomes help maintain transparency.

- **Inclusivity in Governance:**

Avoid centralizing decision-making power within leadership, which can alienate

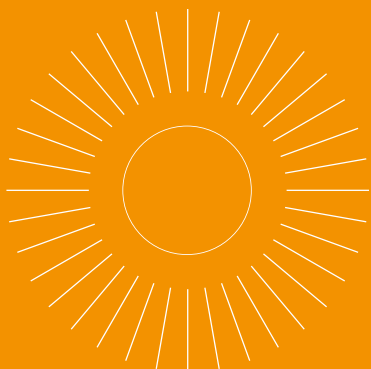
members and erode trust. Associations must prioritize member involvement to maintain engagement and credibility.

- **Visualizing Transparency:**

Provide detailed, real-time dashboards during elections to showcase voter participation rates and compliance checkpoints without compromising anonymity.

- **Encouraging Feedback:**

Establish open channels for members to provide feedback on governance processes, ensuring continuous improvement and fostering a culture of trust and collaboration.







Ensuring the integrity of elections relies on a clear three-step process: votes must be cast as intended, received as cast, and ultimately counted and reported accurately. To achieve this, the user interface should simplify voting, and verification mechanisms—whether on-screen or through a receipt—must provide participants with confidence in the process. Real-time reporting, audit logs, and strict anonymity measures ensure trust while safeguarding against undue influence or breaches of confidentiality. This concept of separating votes from voters is central to secure, transparent, and inclusive elections.”



**Simon Bryan**  
Managing Director,  
Lumi Global



When it comes to election moments, ensuring the system operates flawlessly, votes are accurately tallied, and procedural integrity is maintained is paramount. This process underpins the trust our members place in us—not just for elections, but for every decision we make, from policy recommendations to advocacy efforts that ripple out to influence government decisions and millions of consumers. Each vote and voice matters, and it’s critical that every member feels heard, engaged, and confident in the fairness and accuracy of the process. By fostering this trust, we strengthen both our organization and the impact of the decisions we drive.”



**Kate Moore**  
Vice President of Member Experience,  
National Association of Realtors



Case Study

# Driving Member Participation Across Formats





The National Association of Realtors (NAR) successfully transitioned to hybrid governance meetings following the pandemic, demonstrating how technology and strategic planning can enhance member participation. Facing a diverse membership of 1.5 million professionals spread across various geographies, NAR recognized the need to adapt their traditional meeting formats to be more inclusive and accessible.

## The Challenge

NAR aimed to maintain the high participation rates seen during their in-person gatherings while addressing the growing demand for virtual access. Their challenge was to create a seamless experience for both in-room and remote attendees, ensuring that every member felt included and empowered to contribute.

Poll open

You have voted on 1 of 5 items

### Election

Select up to 3 choice(s) and press SEND

You have 1 choice(s) left

Jonathan Smith ☐

Syylie Hullet ☒

Annie Newman ☐

Sarah Garner ☒

Steve Roman ☐

Marc Horner ☐

Cancel Send

## The Solution

To meet these needs, NAR implemented a hybrid meeting model, supported by secure, transparent voting technology and an emphasis on inclusive practices. This included:

- **Accessible Platforms:**  
Leveraging tools that enabled members to join discussions and vote in real time, regardless of their location.
- **Transparent Processes:**  
Providing real-time reporting and verification to ensure members' confidence in the integrity of the outcomes.
- **Engagement Strategies:**  
Offering interactive features, such as moderated Q&A and live polls, to encourage participation from remote and in-person members alike.

## The Results

By embracing a hybrid model, NAR achieved:

- **Increased Participation:**  
Members who previously faced barriers to attending, such as travel constraints, were now actively involved in governance decisions.
- **Higher Engagement:**  
The combination of accessible technology and inclusive policies led to a significant rise in member interaction during meetings.
- **Enhanced Trust:**  
Secure voting systems and transparent reporting ensured that all participants, regardless of format, felt their contributions were valued and counted.



## Key Takeaway

NAR's commitment to inclusivity and innovation in governance has set a benchmark for member-based organizations. By integrating technology and prioritizing engagement, they demonstrated how hybrid meetings can be an effective solution for fostering robust participation and trust in a post-pandemic world.



Our hybrid governance meetings have been transformative. With 1.5 million members and only one president elected each year, the stakes are incredibly high. It's vital that every voice is heard, whether members join in person or virtually. By integrating secure voting and ensuring transparency throughout the process, we've been able to build trust and foster engagement across the board."



**Kate Moore**

Vice President of Member Experience,  
National Association of Realtors.



## 5. Recommendations for Associations

- **Adopt Scalable Technology:**  
Invest in platforms with proven track records of compliance and user-friendliness.
- **Prioritize Engagement:**  
Ensure hybrid meetings offer equitable experiences for all participants.
- **Foster Transparency:**  
Leverage tools that provide end-to-end verifiability and engage third-party auditors for critical elections.
- **Tailor Onboarding:**  
Equip board members and volunteers with comprehensive training and resources to enhance their readiness.



There are three key takeaways to ensure success for associations. First, prioritize engagement by using tools that seamlessly include both virtual and in-person participants in a way that feels natural and drives meaningful interaction. Second, ensure compliance with secure, transparent voting and proper education to meet governance standards. Finally, build trust through transparency by implementing systems that provide end-to-end verifiability, particularly during elections, to instill confidence in the process and outcomes.”



**Sylvie Harton**  
Chief Business Strategy Officer  
Lumi Global

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## Conclusion

Associations thrive when members feel empowered, engaged, and confident in their governance processes. By embracing hybrid formats, leveraging advanced technologies, and fostering transparency, associations can strengthen trust and drive better outcomes for their communities.



# Contact Us

For more information on how Lumi Global supports associations in enhancing governance through innovative meeting and voting solutions, visit Lumi Global.

**Get in touch**