

Dynamic Work Strategies

Guide for Hybrid Meetings

In a dynamic work environment, there are many options for having productive meetings. When all attendees are remote or all are in person, we have established practices and norms to follow. But when *some attendees* are remote and *some* are in person, *a strong facilitator* can help to ensure the meeting is productive and inclusive. Best practices for hybrid meetings are not one-size-fits-all. Meeting planners should consider what will work best given the subject matter, the purpose of the meeting, the size of the meeting, and the number of people who will be in the room vs those who will be remote.

Preparing for a hybrid meeting –

- Designate a meeting host (remote or in person) who will:
 - Lead the meeting
 - Call on attendees
- Designate a facilitator (remote or in person) who will:
 - Monitor the chat
 - Look for raised hands
 - Run polls
 - Ensure accessibility needs are met (closed captioning, ASL interpreter)
 - Serve as contact for remote attendees during the meeting
 - Troubleshoot issues with audio and screen sharing
- Determine who will be in person and who will be remote (link to Outlook plug-in info)
- Schedule a room with technology to support your hybrid needs.
 - For a small meeting (up to four people) - a single laptop with Zoom may be sufficient
 - For a larger meeting- a conference room equipped with specialized device to accommodate both in-person and remote attendees such as a Neat Board or an Owl may be needed.
 - Include BOTH the room in location field and Zoom link in the invitation
 - Ask in-person attendees to bring their own devices to join via Zoom individually

During a hybrid meeting –

- Everyone in the room should join the meeting from their device so all meeting attendees can see their name and so they have access to Zoom features (raise hands, chat), but they should join WITHOUT AUDIO. In-room attendees should use the microphone from the in-room technology.
- Identify the host and the facilitator and introduce attendees – especially if some in-person attendees are in masks

- Share the ground rules in the beginning of the meeting including how to contact the facilitator during the meeting
- Ask in-person attendees to avoid side conversations with other people in the room and instead communicate through Zoom chat
- Ask that all attendees use the raise-your-hand feature when they want to speak. If those in the room are not also on Zoom, they can raise their physical hand when they want to speak.
- Ask all in-person attendees to look at the camera in the room when speaking as it can be difficult for remote attendees to know who is talking
- Remind attendees that private chats to the host may be visible to ALL attendees on a Neat board. Teams Chat can be used for private chat about logistics and timing.
- Make sure all in-person attendees are visible on-screen
- Periodically ask remote attendees if there is anything they would like to say and watch for people on-screen unmuting themselves as an indicator that they would like to say something

Best Practices for BOTH *Remote and Hybrid* Meetings –

- Maintain a regular cadence of weekly or bi-weekly 1:1 and team meetings. Don't cancel meetings if there are only a few things to discuss. Instead opt to shorten the meeting as these are good venues for discussing goals, answering questions, and setting expectations.
- Ensure calendar invites clearly state if the meeting is virtual, in person, or hybrid.
- Send an agenda in advance so that all attendees are prepared.
- For hybrid meetings, establish in advance will act as the host and the moderator; having two different roles will allow the meeting to flow smoothly. Verify that those who need screen sharing capabilities have it.
- Ensure that other roles (managing polls or breakout rooms and note taker) are assigned in advance of the meeting.
- Leave time for casual conversation as you would have if you were all together in a physical office. This can be at the start or end of a meeting.

Resources -

- [What it takes to run a great hybrid meeting](#) (Harvard Business Review, June 3, 2021)
- [How to Run Effective Hybrid Meetings in the Social Sector](#) (Stanford Social Innovation Review, March 2, 2022)
- [If You're Serious about Equity and Inclusion, Learn How to Host a Hybrid Meeting](#) (LinkedIn, January 15, 2022)
- [Hosting Accessible Remote Meetings and Events](#) (Harvard Resource)