HYBRID MEETINGS

CHECKLISTS AND CONSIDERATIONS FOR SKILLFULLY AND SUCCESSFULLY EXECUTING HYBRID MEETINGS

Produced for and Maintained by

The Washington State Executive Assistants Group

WHAT IS A HYBRID MEETING?

A hybrid meeting is a meeting with both in-person attendees and remote/virtual attendees. The in-person attendees are gathered in a conference or board room and the remote attendees join via a common web platform.

PURPOSE OF DOCUMENT AND DISCLAIMER

This set of suggestions was developed by those who have already jumped in the hybrid meeting pool and were willing to share lessons learned and best practices. These ideas should help you build your own hybrid meeting to suit the specific needs of your agency.

At this time, there really isn't a single "perfect" option that beats in-person collaboration. We compiled these tips as a jumping off point for you to make the best of your hybrid meeting and to make everyone feel engaged and included. This was developed as a living document that we hope will be updated and revised as more people like you develop best practices.

Let's get started!

PREPARE IN ADVANCE

Practice makes perfect, and there may not be anything more important than the upfront work you put in for your hybrid meeting. Here are some things to consider in your preparation:

Become an expert of your environment/meeting space

- If the in-person portion of your meeting is in your building or in a conference room you are familiar with:
  - Set the room – tables, chairs, lecterns, cameras, etc. – to meet your needs
  - **Test, test, and test again** – make sure all of the technology is functioning properly
- If the in-person portion of your meeting is meeting offsite:
  - Request a picture/diagram of the space and visit the site if possible
  - Meet with venue staff to review meeting set-up requirements
  - Secure a facilities and/or IT expert of the space to support you
  - Check the space for ventilation, room for physical distance and any other considerations that might be impacted by changing COVID-19 protocols

Become an expert of your web platform

- Know your conferencing platform and its capabilities, manage user expectations accordingly
- Recruit IT or a platform expert to assist during meetings in case there is a technical glitch

Consider messaging (instructions and expectations) for in-person and virtual attendees

- Ensure virtual attendees have given you their contact information so they can be reached offline for any troubleshooting
- Communicate standards for participation such as when cameras/mics are on or off
- Explain voting process for actions

- Outline naming convention for on-screen identification of members who are virtual
- Decide how to manage the chat function ahead of time and communicate those parameters to all participants

Set the stage, manage expectations

- Prepare a simple statement that this is an environment where the unexpected can happen — "We appreciate your patience with us as we navigate this hybrid environment."
- Assign a technical support person to help virtual members with technical/platform issues
- Send out meeting material early
    - Sometimes technology fails and a virtual user may not be able to see your shared screen
    - Making sure everyone has access to your meeting material gives the virtual attendee the opportunity to remain engaged

Attend/observe another team's meeting

- Reach out to someone you know (or don't know!) who has successfully executed a hybrid meeting and ask if you can observe the next one or watch a recording of a previous meeting so you can get a feel for the flow
    - This would most likely only work for public meetings, but you could still get a feel for the hybrid environment
- Find out what kind of prep they did, see what you can mimic, ask them what went right and what pitfalls to look out for

PREPARE THE ROOM

This will set the stage for the in-person portion of your hybrid event. Make sure all the in-person attendees have a visual line to any screen or monitor that will be displaying virtual attendees, meeting information and/or presentations.

Test run your technology ahead of time

- Make a few practice runs to be sure you are familiar with your equipment
    - Consider training your Board/Commission/Director or other facilitator on the basics
- Retain technical help (IT) for your meeting
- **Document your process for set up so you do it the same every time**, and keep this document updated so that others in your agency can step in if necessary
    - Print a physical copy to post in your agency conference rooms for staff to reference

COVID considerations

- Review the current state, county and local COVID-19 protocols and following accordingly

PREPARE THE IN-PERSON ATTENDEES

Prepare annotated notes or agenda for the meeting host/facilitator

- Use the meeting agenda as a guide to create a run-of-show (or Chair's agenda) for the meeting. Include script, notes, prompts (perhaps in highlighted colors) to differentiate between what is suggested to be spoken and what is a guide for the facilitator's knowledge

Notify of virtual or in-person attendance

- If you do roll call, create a roll call script with notations of who has confirmed attendance and whether they are in-person or virtual
- If you do not do roll call, create a way to announce/inform who is in the meeting and denote whether they are virtual or in-person
    - Consider having attendees announce "in the room" or "joining you online" as part of their introduction

PREPARE THE VIRTUAL ATTENDEES

Prior to the meeting, communicate with virtual attendees to ensure they feel valued, included, and have a sense of belonging when they arrive in the virtual meeting space.

At a minimum include the following information in advance

- Agenda, presentation materials, handouts, etc.
- Virtual meeting details
    - Platform and link (and/or dial in information)
    - Instructions for entering the space/virtual meeting etiquette
        - Camera and mic on/off, chat options, etc.
- Notify of in-person attendance (who will be there and what/where the location is)
- Provide contact information for technical or virtual platform troubleshooting

DURING THE MEETING

Throughout the meeting, ensure that all participants are included equally and have a sense of belonging by ensuring that in-person and virtual attendees have access to the same information, are acknowledged, and are engaged.

- Open the meeting with introductions (verbally or in the chat, depending on your preference)
- There are many variables to consider with introductions
    - In-person first, virtual first, alphabetically, hierarchy?
    - How often do you want people to announce themselves before speaking – this especially important if your meeting is being recorded for later transcription
    - If you are taking public testimony, ensure each speaker knows to announce their name and affiliation for the record
- Ensure virtual guests are acknowledged by having someone verbally call out their name
- Define and share the priority of which participants will be called on first
    - In-person or virtual, and in what order

- The Chair/facilitator should engage virtual attendees regularly using the best practice of allowing everyone to speak first before anyone speaks twice
- Be aware of web platform lags — often when you change to the next PowerPoint slide, it takes up to three seconds for it to populate on the virtual attendees' end
- Remind in-person attendees not to talk over each other
    - This can make it difficult for the virtual attendees to hear what is happening in the room

REASONABLE ACCOMODATIONS

Ensure that all participants have equal access to the meeting by ensuring that reasonable accommodations are met.

- Ensure that handouts are accessible and are sent out prior to meeting so participants can review, be prepared with questions, and follow along with the presentation on a separate screen if needed
- Ensure that Communication Access Real Time (CART), American Sign Language, Other spoken languages interpretation services are provided if requested
    - Introduce these people at the beginning of the meeting
    - Explain how in-person and virtual attendees can access the services
    - Speak clearly, one at a time, and slowly enough for the service providers to keep up
- Ensure that presentations being shown are verbally described

CONSIDERATIONS FOR OPEN PUBLIC MEETINGS

One important issue for any hybrid meeting involving the public is ensuring that it complies with requirements of the Open Public Meetings Act (OPMA). The Washington State Legislature amended the OPMA (Chapter 42.30 RCW) through the passage of Engrossed Substitute House Bill 1329. Multiple sections of this bill are effective immediately, while other portions will become effective on June 9, 2022. A summary of this bill and the changes it enacted can be found on the Municipal Research and Services Center website. We strongly recommend contacting your agency's legal counsel with any questions on this subject.

There are a few things you can prepare for regardless of the changes you'll face hosting a hybrid public meeting

- Drafting language indicating the hybrid opportunity for public engagement
    - Begin managing expectations here
- Sharing the publically available hybrid options as widely as possible
    - Internally via email blasts and staff meetings so all are aware of public participation
    - Externally via distribution lists, GovDelivery, posting info on your website, etc.
- Determine whether you desire the public engagement to be a conversation, or if it is more the style of testimony for a hearing
    - Manage expectations and set guidelines accordingly through your messaging
- Consider setting time restrictions for public participation (ex. Four minutes for testimony)
- Contemplate setting registration deadlines for participation so you can manage internal staffing needs

- Predetermine public speaking order
    - Virtual first, in-person first, alternating?

Work with your Board/Commission/Director/facilitator well in advance on all of the above and anything else your meeting may need. It can be done; you can do it!

AFTER THE MEETING

Part of the continuous process improvement path is to reflect and seek feedback. Debrief the process to make meetings better and better each time.

- Send out a survey to participants, asking them about their unique experience. Ask what went well and what they'd like to see improved in future meetings
- Have a meeting debrief with team leaders to discuss survey results, pros/cons, what went well and what could be better next time
- Make adjustments as necessary/desired for next engagement
- **Make appropriate edits to your process document and repost**
- At future meetings, share with meeting participants the changes that have been made based on feedback
- Share your learned best practices with others

ADDITIONAL RESOURCES

Yes, we can all google, but here a few sources that may help outside of connecting with someone who has been through this:

What it takes to run a great hybrid meeting

6 best practices for your next hybrid meeting

5 steps to make your hybrid meetings more inclusive

How to Have a Hybrid Meeting That Works for Everyone - YouTube

Hybrid Meeting Keys to Success - YouTube

Christine vs. Work: How to Do Hybrid Meetings Right (hbr.org)

13 Rules for Successful Hybrid Meetings: Lessons from 100 Articles | GroupLens

STAY CONNECTED!

Thank you for looking at this resource and we hope you find it useful. We'd like to invite you to contribute your own best practices and/or share any edits you think would benefit others. Please send your ideas to eag@executiveassistantsgroup.org. For this to be the living document we envision we need your contributions for future editions.

Originally Drafted on May 4, 2022

Dustin Dickson, Hybrid Meeting Committee Chair

Becki Ellison, Hybrid Meeting Committee

Leslie Pope, Hybrid Meeting Committee

Cindy Varley, Hybrid Meeting Committee

Lindsay Matthews, Contributing Editor and EAG Co-Chair

Michelle Cleary, Contributing Editor

Terri Noble, Contributing Editor

Amy Lyn Ribera, Contributing Editor

Latest Update Published on May 6, 2022