

Best Practices for Facilitating Hybrid Meetings

A hybrid meeting is one in which some participants are gathered together in person while other participants are remote, dispersed across different locations, typically using video and/or audio to connect online. Just as benefits have been noted for development of hybrid course formats, so too can we find the best of both worlds in hybrid meetings.



Before the meeting

Create and share a clear agenda and all meeting materials.

Creating an agenda for a meeting with both remote and on-site participants can provide structure and organization. Knowing what's coming next can help remote participants feel more comfortable and able to contribute. An agenda can also help people know when to ask questions and when they might be expected to talk.

Share any relevant materials or documents (PPT slides, documents) before everyone gets together. Meetings can then focus on working through issues that require discussion and collaboration, rather than information sharing.

Create and share meeting etiquette and expectations.

Be clear on meeting practices to set the stage for expectations and etiquette. The goal is to start a pattern where location does not determine level of participation. The on-site and the remote participants should contribute equally to a meeting. Being clear about the methods for how the meeting will be run, and the goals that are driving those methods, will get everyone on the same page about meeting expectations.

Outline expectations such as, will you encourage remote participants to use video to increase their presence in the meeting?

For all participants, when responding to questions or offering feedback, will they be expected to raise a hand (or virtual hand) before they speak, or can they engage whenever they feel comfortable? Will remote participants be expected to share audio or use the chat (or both)? Having some guidelines in advance will prepare everyone for how to expect to interact with each other.

Assign or ask for a volunteer to act as remote meeting (co)facilitator.

One of the best ways to make sure that a hybrid meeting goes well is to have a remote person (co)facilitate the meeting and track online participation. The remote person can make meetings more productive by taking a leadership role in the planning and running of meetings. One of the biggest challenges for remote and on-site participants is being interrupted or talked over. The meeting facilitator guides the conversation and keeps things on track.

During the meeting

Be a gracious host.

Let remote attendees know they do not need to apologize for the barking dog, household noise or the ringing doorbell in the background and that it's OK to come off mute – when contribution is needed – even if they have background sounds. Set the expectation at the beginning of the call so attendees will feel more comfortable and supported. It is preferable that participants do stay on mute when not speaking/contributing in order to reduce continuous, distracting noise (e.g., typing on a keyboard).

Address all participants by name/ask participants to share name when speaking.

In a fully on-site meeting, everyone can see who is talking, and gesturing and pointing at someone to speak next is commonplace. To ensure equity in participation among all participants (on-site and remote), use names when addressing or calling on someone and/or ask participants to identify their name when contributing so that everyone is aware who is talking. This can also help participants learn everyone's name if it's a particularly large meeting or if your meetings are only occasional.

Summarize as you go.

Reiterate and summarize key points as you go, and then stop to ask the remote participants for questions and concerns. It's more effective to stop every now and then, because it helps all participants refocus attention.

After the meeting

Send meeting notes and, if agreed upon, a recording of the meeting.

There may be some technical barriers or connectivity issues preventing remote participants from understanding everything that was said during the meeting. Ease concerns by always sending out a summary of the meeting via email to the attendees.

You can also send a follow up email with action items when the meeting is over.

If you made a recording (video and/or audio) using [MS Teams](#) or [Zoom](#) recording features, you can send a link to the archive as well to review.

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References:

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