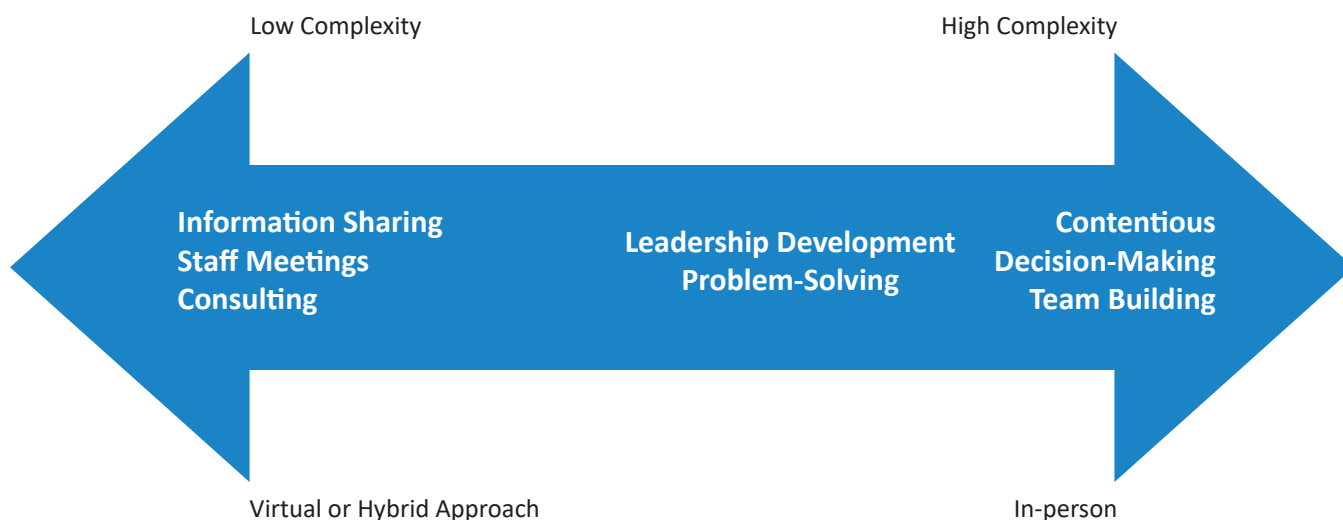# Planning and Facilitating Hybrid Meetings

You were asked to facilitate a hybrid meeting (some of the participants are together in a room, and others are participating virtually). This handout provides tips for that task.

CHOOSING THE RIGHT APPROACH

One of the first questions to ask concerns the appropriateness of the hybrid meeting approach. Hybrid meetings are more inclusive, since more people can easily participate. But not every meeting lends itself to a hybrid delivery. The more complex the meeting goals, the better to have the meeting onsite only. Task-based meetings, however, work well online or in a hybrid manner. And sometimes a meeting where everyone is online is better than a hybrid meeting, because all of the participants are engaging in the same way. Sometimes the best option for participants is to have two separate meetings, one for those onsite and a second for those online. Although this might take more time from a facilitator's perspective, the meetings are more productive and effective.

The graphic below, adapted from *When do We Actually Need to Meet in Person? (Harvard Business Review, July 26, 2021)*, illustrates this concept.

Low Complexity | High Complexity

Information Sharing
Staff Meetings
Consulting

Leadership Development
Problem-Solving

Contentious
Decision-Making
Team Building

Virtual or Hybrid Approach | In-person

In addition to the *foundational facilitation techniques and skills* to consider when preparing for the meeting, there are additional considerations for facilitating a hybrid gathering. The tips included below assume you are facilitating onsite. For online facilitators, these ideas still apply, but you will want an onsite co-facilitator to assist and be your eyes in the room.

CHOOSING THE RIGHT TECHNOLOGY

Equity for participants is always a consideration, and a hybrid meeting is no exception. Make sure the technology platform is accessible and available to everyone who is participating online. Have a phone number online participants can use to access the meeting if they have internet or computer issues. Check with participants ahead of time regarding their accessibility needs. For example, if a participant is hearing impaired, make specific arrangements so they can fully participate. Be aware of specific cultural considerations of participants. It is always important to have a conversation with the meeting host ahead of time to help prepare appropriately.

Technology is key to the success of a hybrid meeting. A fundamental best practice is to find someone with IT expertise to help plan and implement the technology for both the onsite event *and* the online platform.

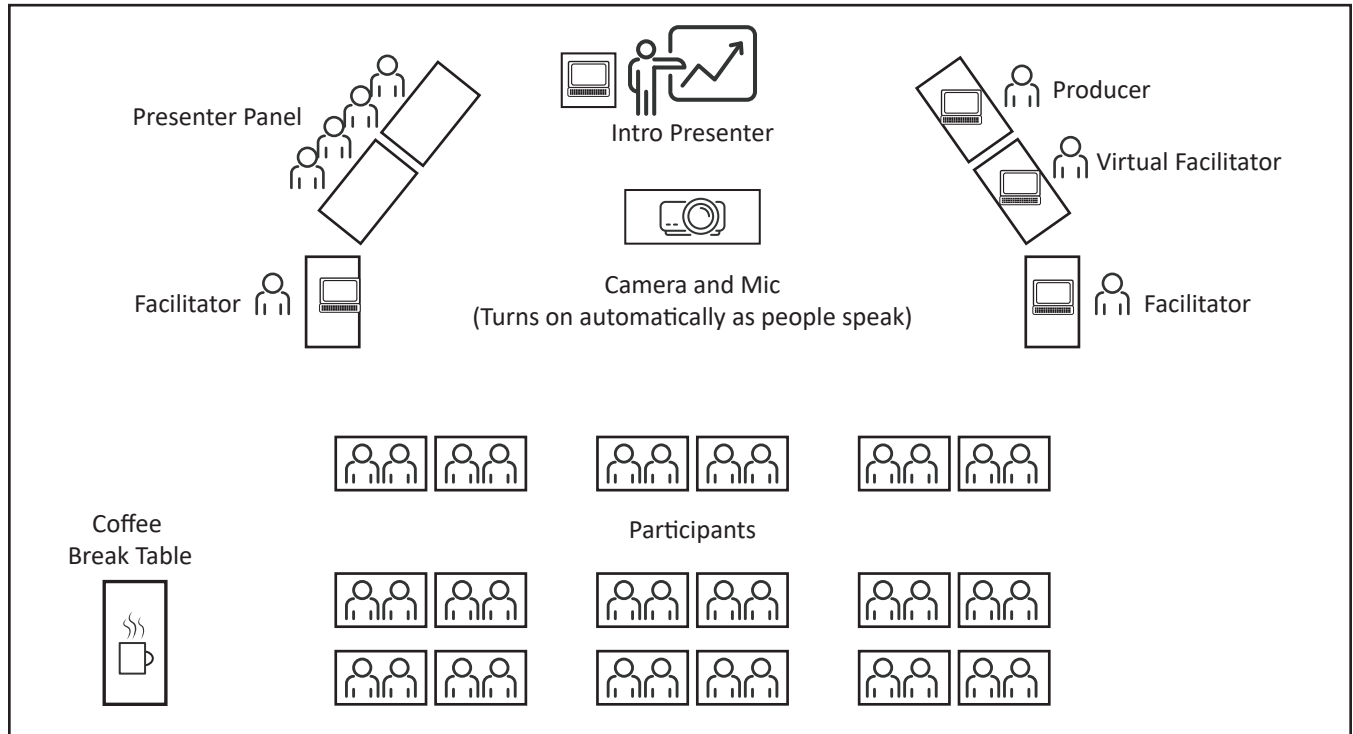## FOR PARTICIPANTS WHO ARE LOCATED ONSITE WITH A FACILITATOR

Technology Considerations

- Provide a strong, secure internet connection in the room.
- Position a large computer monitor centrally so all participants can see the online participants. In some cases, multiple monitors may be needed depending on the size and configuration of the room.
- Consider using multiple laptops with built-in cameras positioned strategically around the room. Each laptop joins the meeting as a "participant," so each would appear as a square for the online participants.
- Try to select a room where there are good acoustics.
- Make sure speakers are good quality.
- Provide high-quality microphones so that online participants can hear everyone in the room. If onsite participants are located at multiple tables, consider having a microphone at each table.
- Be sure to have one or more high-quality cameras.
- Technology platforms (e.g., Zoom, Microsoft Teams, Google Meet) are always evolving and getting better. Zoom's Smart Gallery, for example, detects individual faces in a shared room and pulls them into panes on the screen so online participants can see them.
- Consider whether each onsite participant needs a laptop or tablet (this is dependent upon the planned activities for the participants).

Set-Up

- Arrange the room and the camera(s) in such a way that online participants can see people in the room. This is especially important during discussion times. If there are presenters or speakers, make sure the camera is focused on them.
- Be sure speakers are located where everyone in the room can easily hear online participants.
- To provide better camera angles for online participants, use multiple laptops with cameras around the room. Each laptop should be logged in as a "participant" to the technology platform. Another webcam on a tripod could be moved around as needed to provide close-ups of flip charts or other in-room information.

EXAMPLE ROOM SET-UP

Presenter Panel

Intro Presenter

Producer

Virtual Facilitator

Facilitator

Camera and Mic
(Turns on automatically as people speak)

Facilitator

Coffee
Break Table

Participants

FOR ONLINE PARTICIPANTS

Technology

- Be sure to have a strong, secure internet connection.
- Make sure the laptop includes a camera and a microphone.
- Check lighting prior to the meeting. Make sure lighting is from the front and not from behind, as webcams automatically record and adjust to the brightest source of light, and if that light is behind the online participant, they will no longer be in focus. Make sure the lighting is balanced. One light above or in front can cause dark shadows on the participant's face.
- Check the background prior to the meeting to ensure that there is nothing distracting or inappropriate.
- Consider using a headset or earbuds to help with audio.

Best Technology Practices

- Stay on camera if possible.
- Stay on mute unless speaking.
- If the platform has a raise hand feature, use that.
- When possible, come off mute to ask questions instead of using chat.

FACILITATION TIPS AND CONSIDERATIONS FOR A HYBRID MEETING

Have Co-Facilitators and Technology Producers

- Have a co-facilitator or assistant who is assigned to the online participants. This person can help monitor the chat, watch for raised hands and body language, and ensure the online participants are able to easily participate and feel like they are being treated equitably. The co-facilitator and facilitator may want to establish a means for "side" communication (like a separate chat or text channel) so they can easily collaborate during the meeting.
- Have a separate technology producer, if possible, so the online facilitator can focus on interacting with participants. The technology producer can help navigate issues with the online platform, as well as assist with uploading content, opening polls, and using other technology features. This person can also help with any onsite meeting room technology challenges.
- If there is not a person available to be the producer, then the co-facilitator can also help with any technology challenges.
- If there are multiple locations of onsite participants, assign a co-facilitator to each of those locations.
- Make sure the co-facilitators, producers, and meeting lead have a way to communicate with one another if technology fails; for instance, share cell phone numbers ahead of time and agree to text if issues arise.

Check Room and Technology Ahead of the Meeting

- If at all possible, visit the meeting room a day prior to the meeting to make sure the room is set up appropriately to accommodate both the online and onsite participants.
- When in the meeting room a day prior to the event, test the technology to make sure the onsite equipment works and works well with online participants. If possible, ask the online participants to log on during this test session so they can practice with the technology platform and give feedback on how they are seeing and hearing the onsite room. If they can't log on during your test session, have some colleagues log on to give feedback on the onsite room.
- Ask online participants to join the meeting 15 to 20 minutes ahead of the scheduled time to address any technology challenges they may have.

Have Ground Rules and Norms Specifically for the Hybrid Environment

- In addition to other meeting-specific ground rules, include some rules around the hybrid nature of the meeting.
- Some examples of ground rules include
  - » **Everyone needs to be on camera, including those together onsite.** This is important during a hybrid meeting to make everyone feel connected and present.
  - » **Everyone needs to raise their hand to speak.** For a hybrid meeting it is important that everyone raises their hand (with online participants using the raised hand feature) to allow for more order and less confusion in the discussion. When calling on people to speak, make sure you say their name; this is especially helpful for the online participants who may not be able to clearly see everyone in the room. For comments or questions from onsite participants, use microphones whenever possible, or be sure to repeat the comment or question for online participants.
  - » **Avoid side conversations.** This is a good reminder to onsite participants. If onsite participants are having a side conversation, the online participants feel left out. If you are an online participant, don't start a private or public chat with another online participant as a sidebar. This is like speaking to your neighbor in an onsite meeting when someone else is talking. Be clear to your participants that the chat is only to be used to ask questions or answer questions.
  - » **When speaking, don't forget the online participants.** This is a reminder to onsite participants to include online participants in their eye contact to make them part of the conversation. Look directly into the camera when you connect with online participants. This helps them know that you are speaking with them.
  - » **If you don't see something or hear something, say something!** This gives the participants permission to speak up.
  - » **Work on the session ONLY during the session.** This is a good ground rule for any meeting, but for a hybrid one, it reminds the onsite participants specifically not to continue to have meeting-specific discussions in the hallways or during breaks when the online participants can't join in. Avoid the "meeting after the meeting" for both onsite and online participants.
  - » **Mute . . . unmute . . . re-mute.** This applies to everyone, including onsite participants who may have individual microphones or microphones on their table.

USE ENGAGEMENT TOOLS ACCESSIBLE TO ALL

- Consider starting the meeting with an icebreaker activity that requires everyone to speak. This allows participants to become comfortable with speaking up, and they are more likely to speak later if they speak during an icebreaker.
- Make sure the meeting engagement tools can be used by all participants. For example, if the onsite participants are using a phone to answer a poll question (that the online participants are answering through their computer), provide an option for participants who may not have a phone or want to use it to submit their responses manually with pen and paper.
  - » One option is to use online collaborative tools that all participants can access. However, this will require your onsite participants to have a laptop or phone with them. If a phone or laptop will be required for onsite participants, be sure to let them know this prior to the meeting. Having a common platform allows everyone to participate equally. However, onsite participants may then wonder why they are onsite only to be behind a screen as if they were online.
  - » As an alternative, have online participants use an online tool while your onsite participants are using a similar onsite tool. For example, for brainstorming using roving flipcharts, onsite participants will be walking around the room, answering the questions on the flipcharts. The online participants will do the same exercise with the same questions using a jamboard. Having a co-facilitator who is assisting the online participants is crucial to making this work. The critical step in this approach is to be sure to share the online ideas with the onsite ideas, and vice versa, by adding the flipchart ideas to the jamboard and then sharing the link for all to review after the meeting.
- Instead of using the platform's chat feature, which only allows the online participants to see it, use an online tool that all participants, even onsite ones, can view and use in chats. If a platform's chat feature is used, be sure to read the chats out loud for the onsite participants, especially if there is only one monitor in the room and most participants are too far away to read the chats.
- For any engagement tool used, make sure all the participants are comfortable using it. It is always a good idea to practice using it with a warm-up activity—a question or two that is fun, such as, "what is your favorite ice cream flavor?" rather than content-related.
- If key ideas and discussions are captured on a flip chart in the room, make sure there is a camera pointed at it so the online participants can read it as well. Alternatively, have a co-facilitator use an online whiteboard, a PowerPoint slide, or a Google document to capture the flip chart content concurrently so that the online participants can see what the onsite participants are seeing.
- Round robin is a great tool to make sure everyone has an opportunity to participate. If this is used, start with an online participant and alternate back and forth between online and onsite participants. Alternatively, select one person to start off and then ask that participant and each following to choose who goes next, asking them to alternate between online and onsite participants. This is a good way to encourage active listening.
- Breakout groups allow for more participant engagement. Online participants can be in their own rooms, using the platform's breakout group feature. If notes taken during the breakouts are important for the

whole group to view, make sure the notes are taken in an online whiteboard or a Google document that can be viewed by all participants. For even more inclusion, make breakout groups a mix of onsite and online participants. For example, each breakout group could have a separate meeting link that participants would join, with the onsite participants joining together on one laptop. This takes more preparation and planning and may require separate rooms in your meeting facility to control noise levels.

Be Mindful of the Online Participants

- Welcome people as they join the meeting, both online and onsite. Have a camera positioned where online participants can see as people are entering the onsite meeting space. When greeting online participants, make sure to look into the camera, and welcome them by name.
- At the beginning of the meeting, be explicit about meeting roles and who is doing what. For example, if someone in the room has been asked to take notes, it might not be obvious to the online participants, so take the time to go through the various roles of who is doing what. Consider asking an online participant to take on one of the roles, such as notetaker.
- Be sure to regularly look toward the camera to include the online participants. Never turn away from the online participants. Set up the room well so this doesn't occur.
- When calling on raised hands, alternate between online and onsite participants, starting with the online participants.
- Avoid asking if anyone online has anything to contribute, as that often will result in silence and make the online participants feel less connected to the discussion.
- Be aware of cadence and speaking pace, as there may be a slight delay due to the technology.
- Try to share all documents and presentations with everyone ahead of the meeting. If possible, avoid using screen sharing, as it makes it difficult to see each other.
- Be aware of power and group dynamics when participants are together. Those together onsite will have an easier time communicating and connecting with others in the same room. To help with this, as well as to ensure engagement of everyone, keep a list of all participants and put check marks next to a person's name as they speak.
- A co-facilitator for the online participants can read chats out loud and indicate when there are raised hands.

Consider Other Ways to Help Participants Connect With Each Other

- Depending on the meeting topic, format, and number of online participants, give each online person an in-room buddy who can help the online participant as needed. The two can communicate directly (through text or email) and the onsite buddy can let the group know if the online buddy has a question or needs information clarified. Some online participants feel more comfortable sharing this way instead of having to interrupt the discussion. If this is included in the meeting, make sure there are specific ground rules around when and how the buddies communicate to avoid distracting side bars.
- If breakout groups are creating something (maybe as part of an icebreaker or team building activity), have them take a photo of their creation. Over a break, compile all the photos together in a PowerPoint and then share the PowerPoint so everyone can easily see all the creations.
- At the beginning of the meeting, ask all the participants to draw a circle on a piece of paper. Then ask them to put all the participants, by name, around their "table." Ask them to keep that in front of them during the meeting to remind them who is "in the room."
- *Listening walks* are a great way for online and onsite participants to connect. Pair up an onsite participant and an online one and have them share phone numbers to talk on the phone. Give them a specific amount of time to talk around a specific topic or question. Be sure to stress that one partner listens and doesn't talk for the specified time and then they switch. It is nice to have the partners then reflect on what they each shared, either between the two of them or as part of a larger group debrief. During the listening walk, encourage them, if they are able, to walk while they are talking on the phone.

RESOURCES

- *When Do We Actually Need to Meet in Person?* by Rae Ringel, *Harvard Business Review*, July 26, 2021
- *Considerations and Best Practices for Running Hybrid Meetings* – i4CP
- *What It Takes to Run a Great Hybrid Meeting* by Bob Frisch and Cary Greene, *Harvard Business Review*, June 3, 2021
- *8 Tips for Facilitating Nonprofit Hybrid Meetings* by Beth Kanter, August 17, 2021
- *How to Host Inclusive Hybrid Meetings* – UW-Madison July 20, 2021
- *11 Tips for Brilliant Hybrid Meetings and Workshops* – The Big Bang Partnership
- *How's Your Online Facilitation Going Right Now?* – The Big Bang Partnership
- *How Can You Spot a Great Facilitator?* – The Big Bang Partnership
- *Managing Introverts and Extroverts in the Hybrid Workplace* by Erica Dhwan, *Harvard Business Review*, August 19, 2021
- *Unmuted: What Works, What Doesn't, and How We Can All Do Better Working Together Online* – The Goodman Center
- *Intro to Facilitating "Hybrid" Online Groups* – Training for Change
- *Strategies for Facilitating "Hybrid" Groups Online* – Training for Change
- *Hybrid Meetings and Training Sessions: What are your Best Practices?* – Leadership Strategies
- *10 Facilitation Techniques That Will Make Your Hybrid Meetings More Engaging* – Howspace