# IOWA

# HYBRID & VIRTUAL MEETINGS

While there is something about proximity that cannot easily be reproduced in online meetings, there is also broad agreement that working remotely has unique benefits. Following the practices in this guide will help you create virtual (everyone is remote) and hybrid (some individuals meet in-person and some are remote) meetings that are productive and enjoyable, leveraging Microsoft Teams and Zoom, two virtual meeting software options available to UI students, faculty, and staff.

## Why Meet?

The need for project updates, strategic planning, team problem solving, process improvement, conflict resolution, recruitment and onboarding, and a plethora of other business functions can create a need for a group to meet.

This work is best accomplished when the organizer and participants agree that the meeting is necessary and the goals are clear. Frequent meetings interrupt workflow, and some issues are better handled via Teams chat, phone call, or email.

- **PURPOSE:** What is the purpose and intended outcomes of the meeting?

- **SYNCHRONOUS OR ASYNCHRONOUS:** Can parts or all of the work be performed effectively (or even better) asynchronously through email, shared documents, or other collaboration tools?

- **CONNECTION:** What kind of experience do you want people to have during the meeting? How will you provide an inclusive and equitable experience for participants?

- **CONTENT:** What information needs to flow between organizer and participants? How can that best be achieved?

Meeting goals and situational factors (the mixture of remote and on-campus staff) should drive decisions about meeting format and platform.

## Considerations for Hosting Hybrid Meetings

Hybrid meetings require more thought and planning than virtual or in-person meetings. Think of them as three meetings in one—the in-person gathering, the virtual gathering, and the bridge between the two.

This may sound complex, but it is important to think through how you are going to make the hybrid meeting inclusive, equitable, and effective for *all* participants, and have people assigned to the right roles to make it happen. Do not expect the meeting leader to perform all these roles simultaneously, especially with larger groups.

If you are going to host a hybrid meeting, you will need to find a room for staff wanting to physically meet, while inviting remote staff to log in, typically via Zoom or Teams.

Hybrid meetings are not new to us, but we are figuring out how to improve our technique, using a few best practices:

- ✓ Consider selecting someone to be the "bridge" between campus and remote audiences for technology issues, especially for high-stakes meetings.

- ✓ Adhere to the agenda and time allotted. Appoint a timekeeper to assist if needed.

- ✓ Focus on the needs of the remote staff first. That approach will likely accommodate on-site participants.

- ✓ For Q&A, start with your remote audience or be mindful of staggering questions from each audience. Take an equal number of questions from each audience, no matter the numbers.

- ✓ Display remote employees or provide a check-in slide for everyone to sign in (to remind presenters and participants that some individuals are remote).

- ✓ For the benefit of remote staff, announce who is in the room. Verbal introductions can work.

- ✓ Blend audience engagement by including everyone in activities. Most activities can be replicated virtually.

## Preparing for a Successful Meeting: The Organizer's Role

As the meeting organizer, you should:

✓ Include the Zoom or Teams link in the Outlook meeting invitation.

✓ Hold shorter meetings. Screen fatigue is real—consider 45-minute meetings and try not to exceed 90 minutes.

✓ Consider your attendee list and only invite those who really need to be there. (If you want to be inclusive, other individuals can be listed as "optional").

✓ Distribute an agenda in advance, and request feedback on the agenda so that you aren't surprised by requests to discuss additional topics.

- Include a clear goal for the meeting:
  - Information sharing?
  - Determining action (identifying and prioritizing next steps)?
  - Imagining possibilities (brainstorming options)?
- The agenda also can set expectations for use of cameras and any unfamiliar web tools so participants can prepare appropriately.
- If participants will need to complete tasks or prepare in advance, emphasize instructions and deadlines.

✓ Determine what roles are needed to run the meeting effectively. Virtual meetings have a production component to them, especially if you are utilizing functions like chat, polls, breakout rooms, annotation, whiteboards, and other engagement tools. Consider having someone (other than the person leading the meeting) manage these elements, including moderating the chat. For large meetings, you may need more than one "producer."

✓ Should cameras be used? Individuals are often more engaged if their video is on, but it can be less important for large presentation meetings.

✓ Consider whether you will be sharing any files.

- Participants who share documents should do so in a dedicated window, full screen, sharing only that window.
- If you are presenting using PowerPoint with dual monitors, enable the dual monitor option in Zoom before the meeting begins by going to Settings/General.
- If you are presenting using PowerPoint, put the slideshow in Presenter View mode (press Alt-F5) before sharing the screen. Choose the option to only share the application and choose the presenter view to hide your notes.

- If your presentation is visually dense or contains video, consider distributing in advance.
- Presenters should consider putting communication apps (e.g., Skype for Business) in Do Not Disturb mode while presenting or closing apps that create notifications.

## During the Meeting: The Organizer's Role

✓ Log in early.

✓ Greet participants by name and wait a few minutes for everyone to log in.

✓ Consider addressing participants who have joined by phoning in, providing them some visual context during the meeting and suggesting ways to share comments later.

✓ Encourage participants to set their Zoom meeting names as appropriate (name they prefer to be called, department, pronouns if they wish to share)

✓ Promote casual chat (e.g., "How is your week going?").

✓ Encourage the chat feature for questions and comments. You may want to refer specifically to the chat so that people know where to turn their attention. Reading the chat out loud can help participants who may have trouble keeping up with multiple windows.

✓ Set expectation for video (on or off, or perhaps let individuals decide).

✓ Set expectation for audio (participants should enable their mute button when not speaking).

✓ Turn on live captioning to increase accessibility for all participants. This may be particularly important to attendees who are neurodivergent, deaf, or hard of hearing, or those who speak English as a second language.

✓ Introduce new participants.

✓ Share goals for the meeting.

✓ Engage participants early in the meeting by getting their voices in the room. You might ask for responses to a straightforward, low-risk question. Responses could be verbal, in chat, in a poll, or on a whiteboard, application, or shared document.

- Chat waterfall: Ask participants to type a response in chat, but not hit enter until instructed. The result is a simultaneous chat that allows participants to see a wide range of perspectives not influenced by first or loudest comments. Let everyone take a moment to read the chat so they aren't choosing between the chat or with the verbal conversation.

- ✓ Monitor participation (if you want most participants to provide input). You can ask to hear from some new voices. You can also ask those who haven't spoken yet to share what they are hearing. Hearing someone's framing of what has been shared can enhance the conversation.

- ✓ If you are looking for input from everyone on a question, here are a couple of techniques to try:

  - Put the directions or question in the chat with *** above and below so everyone is clear about the instructions, and so the chat is a better source of notes for the future.

  - Have each participant name and "pass to" another participant when they are done speaking. Keep track of who has spoken. In Zoom, you can rearrange the squares to help keep track.

  - Have participants type their name in the chat, then use that as the "speaking order. Everyone can see who is going next, and when it is their turn to speak.

- ✓ Encourage use of nonverbal feedback (e.g., Reactions button in Zoom or Emojis in Teams).

- ✓ Establish an understanding among participants about when and how to interrupt. Especially in larger meetings, invite participants to use the Raise Hand feature in Zoom. This moves those with their hands raised to the top left of the screen and appears in the participants' pane.

- ✓ Encourage participants to enable their mute button when not speaking.

- ✓ End timely. If you wrap up the conversation with at least five minutes to spare, you can use that remaining time to do one or more of the following:

  - Provide a summary of decisions made during the meeting.

  - Clarify any remaining questions about next steps.

  - Ask participants to identify what went well and what could be better next time.

  - Ask participants to share their biggest takeaway from the meeting in chat.

  - Schedule the next meeting (if not a recurring meeting) while everyone present is there with calendars.

  - Request agenda ideas or draft a plan for the next meeting.

## Before and During the Meeting: Guidelines for Participants

Preparing for a virtual meeting is very similar to preparing for an in-person meeting with additional attention to ensuring technology is functioning properly.

- ✓ Read the agenda and come prepared.

- ✓ Use the mute button when you are not speaking.

- ✓ Silence your phone and resist the urge to pick it up.

- ✓ Dial in via phone only when you have no other options.

- ✓ Consider location for best lighting (increase lighting in front of you, reduce lighting behind you).

- ✓ Evaluate your background. Is it representing what you want others to see? If not, try the blur feature or a simple, virtual background.

- ✓ Use the 'Hide Self View' option in Zoom if you find seeing yourself on the screen distracting.

- ✓ Anticipate and prepare for distractions. Consider using a fidget toy to prevent the urge to click.

- ✓ Don't multitask. Others can see you.

- ✓ Consider speaker vs. gallery views.

- ✓ Look at your video camera for most impact, especially when speaking.

- ✓ Use headsets or earbuds (rather than built-in microphones and speaker) for the best audio.

- ✓ If you are connecting from a laptop, note that battery use can adversely impact video quality, so plug into wall power if possible.

- ✓ Raise your hand or utilize chat for comments.

- ✓ Remember that joining virtually is akin to sitting at a conference table.

## Ideas to Enhance Virtual Meetings

- ✓ Provide an activity to do as participants arrive (e.g., check-in question, image on screen to annotate, paste an image of your day, etc.).

- ✓ Invite participants to be human (e.g., hold up something "real" in your workspace, show your current footwear, take a sip of drinks together, show something unexpected on your desk).

- ✓ Assign roles like scribe and speaker for breakout rooms.

- ✓ Create a digital board in advance of a brainstorm session. Participants, wherever they are located, take part equally by adding their ideas before a meeting. Collaboration begins earlier and meetings are richer—and often shorter.

- ✓ Use Teams' or Zoom's breakout functionality (publicize the Help button and assign someone to monitor and assist).

- ✓ Use polling features in Teams and Zoom to survey the group and boost engagement.

✓ Explore Zoom Webinar features (useful for large, public, or view-only events; requires an add-on license).

✓ Focus discussion by screen sharing a slide deck.

✓ Use PowerPoint as a virtual whiteboard or flipchart.

✓ Use whiteboard/annotation tools in Teams and Zoom.

## Things to Remember about Hybrid and Virtual Meetings

**It's easy to miss something or someone:** Remote workers indicate that the biggest challenge of virtual meetings is being interrupted or dismissed. Since so much communication is nonverbal, these slights are usually unintended and unnoticed, but can add to a feeling of isolation.

Some meetings can be structured in ways that encourage interaction and ensure remote participants are not an afterthought. It could be as simple as going around the virtual room and inviting people to speak (it might be best if attendees, both on-site and virtual, raise their hands.) If the meeting is a manageable size, the meeting leader can ask for input by calling on those who have been quiet or circle back to anyone who seems to want to speak.

**Annoying tech problems happen:** Technical issues can also be challenging. Participants' computing equipment might be dated, with challenges such as a poor internet connection or a single monitor with low resolution.

In advance of very important meetings, it can be useful to offer a dry run practice session for key participants. Think about including a tech contact on virtual meeting invites so remote participants have a resource in case of connection issues.

## References and Resources

**Tools and Templates:**

- Virtual/hybrid meeting template: PowerPoint template includes slides to help with virtual meeting setup and flow, and slide templates for interactive activities to engage and gather input from participants.

- Miro whiteboard: Powerful collaboration tool for organizing and sharing content.

**Technology Support:**

- Comparing video conferencing options

- Zoom how-to guides

- PowerPoint presenter view in Zoom

- Stanford research on Zoom fatigue

- Slate on hiding your face on Zoom

- Sharing a whiteboard in Zoom

- How to use whiteboard in Microsoft Teams (5-minute video)

**Online Training:**

- LinkedIn Learning: Log in using your HawkID to access many online training videos on Zoom, virtual meetings, etc.

**Articles and Thought Leadership:**

- Presence matters: Our presence can really matter when we participate virtually in meetings. Justin Sipher, leadership coach and consultant at MOR Associates, says there are many things we can do to ensure the presence we are conveying represents both what we want and what we need for success. He prefers the phrase "working while home" rather than just thinking of it as "working from home," and suggests we enhance our virtual presence through the 5As: Aware, Appear, Active, Articulate, Authentic.

- NPR: Remote Work is Leading to More Gender and Racial Harassment, Say Tech Workers

- Atlassian: How to Bring Workplace Practices to a Remote World

- Forrester VP and Principal Analyst Art Schoeller on the webinar Forrester Research on the Future of Meetings and Hybrid Work:

  - Slides shared by Forrester VP and Principal Analyst Art Schoeller

  - Webinar recording

- The Art of Gathering: Book by Priya Patel

- Virtual Not Distant: Podcast

- Harvard Business Review: How to Nail a Hybrid Presentation

- MOR: Hybrid Meetings: 8 steps to Success