



The Hybrid Meeting Guide



What to Do When Meeting Attendees Are Virtual And Present



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When the world was forced to meet remotely during the COVID pandemic, board meetings changed forever. At first, many organizations scrambled to adjust, but over time it became clear that there were profound advantages to allowing remote attendance. As the world starts to return to normal, it is crucial that organizations learn to master the hybrid meeting format: a meeting with both physically present and virtual attendees.

Providing your board meeting participants with a way to attend your meetings virtually ensures you get the full benefit of their involvement. A hybrid meeting that includes some attendees in the same room and some attending remotely can give you the diversity, expertise, and quorum you need to function and get things done.

Hybrid meetings are here to stay. The right technology, a sound approach to meeting management, and a commitment to engaging all meeting attendees—board members or otherwise—can help you make the most of hybrid meetings. In this guide, we will explore everything you need to consider to make them a success.



What is a Hybrid Meeting?

A hybrid meeting is one that takes place in a physical setting, but that some members **attend using technology** instead of being physically present. These members use a computer or other device to join the meeting, so they can listen to presenters, see speakers, and add their own insights, despite being off-site. A computer and internet connection are needed, along with audio and/or **video conferencing technology** to facilitate the process. Your board and organization can get the full benefit of your members' knowledge and experience by offering hybrid meetings as an option.



Did You Know?



Boardable has a secure **video conferencing product called Spotlight** that allows attendees anywhere to see the same documents, presentations, and speakers, all in one tab.



Making the Most of the Hybrid Meeting Process



Pro Tip

For boards of directors meetings in particular, hybrid meetings can support **board diversity initiatives** by including board members from a wider geographic area.

Hybrid meetings don't have to be vastly different from a **traditional meeting**, provided you have appropriately adjusted for the format. That said, a hybrid meeting that includes members who just passively listen won't help you accomplish your goals. To be truly effective, you need remote members to participate fully and to share their insights, along with physical attendees, so that all perspectives are heard.

Since the interpersonal dynamics of hybrid meetings differ from fully in-person discussions, there are some specific details you'll need to adjust to and know before the meeting begins. Here's what every executive director or board chair needs to know about hybrid meeting management:

STEP 1:

Ask Whether Your Organization Allows Hybrid Meetings

One of the first things you need to know is if your organization allows a mixture of virtual attendees with traditional in-person attendees. Some boards have specifically outlawed remote attendance in their bylaws, while others do allow remote attendees. Sometimes state law prohibits virtual attendance entirely. You'll need to check multiple different sets of regulations to confirm you are able to allow members to participate on a virtual basis:

Your own bylaws and governance

Review the terms of **your board governance** to be sure that remote attendees are allowed. If your own governance does not permit remote participation, you won't be able to use this method. If your board governance does not specifically mention hybrid meetings, you may be able to run them – speak with your board chair and legal counsel to understand any ambiguous rules. If your governance specifically provides for hybrid meetings, you're on solid ground and can continue with the process.

The laws of your state and location

Your home state or province may have some specific rules regarding nonprofit meetings and remote participation. You should review any legal ramifications involved with hybrid meetings. Most states do allow remote attendance for nonprofit boards, but checking local regulations in your state will give you peace of mind before moving forward.

Safety standards of your state and organization

Make sure your board is in agreement about the rules about who may meet in person. In terms of the pandemic, this may mean limiting the number of people gathering in person, following social distancing or masking protocols, and so on. This will likely be a changing rubric, so be sure to revisit and communicate guidelines often.

By taking the critical first step of reviewing the governance and safety considerations of your own organization and the laws of your state, you can immediately determine if you can include board members using remote technology. If you push ahead without checking, you could end up in violation of your own bylaws or of state law. You could also end up wasting a lot of time getting technology and participants ready, only to find that your board isn't comfortable meeting in a hybrid format.

STEP 2:

Optimize your Agenda

When board members are physically present, you can keep them engaged and **move the agenda along** relatively easily. Offering food and beverages, maintaining eye contact, including members in the conversation, and passing out paperwork and other items helps members stay focused and engaged.

However, when you have remote attendees, they miss out on all of the activities that help them stay connected. Therefore, your agenda in a hybrid meeting should be concise but conversational, focusing on essential talking points and bringing remote members into the conversation regularly. You should also **break up the agenda** into segments to allow time for discussions about specific items, assisted by multimedia visual aids and imagery. Screen sharing, videos, images, and different camera shots and views allow the remote guests to feel like they are in the room – and that helps them stay connected and involved.

Incorporating variety, move your most important points to the beginning of the meeting, to take advantage of your remote members' focus. A member that would never consider physically leaving a board meeting might feel freer to depart from or check out from a virtual meeting, so hit the important things upfront to be sure

nothing crucial is missed. Your remote attendees should be able to **access the agenda early**, so they can prepare notes on key topics and address the group when they need to. It is also important that the board chair brings remote members into the conversation by asking for their opinions on specific agenda items. Asking for remote members' opinions will keep them focused and help them participate in the meeting. Additionally, A steady stream of chatter in the room could cause your remote members to check out mentally, so be sure that physical attendees are mindful of the ground rules.



Pro Tip

Attention is hard to sustain for more than an hour, especially virtually. Plan meetings to conclude before people start to lose focus, or schedule in breaks.



STEP 3:

Conduct Effective Hybrid Meetings

Make the most of hybrid meetings by facilitating engagement, interest, and participation. [Our full guide to remote meetings](#) highlights some of the most important steps you can take to manage the meeting. You can incorporate the tips below as well.

Check and double-check technology

If your remote members can't see or hear you (or can't be heard in the meeting location), they won't be able to participate at all. Check technology before the meeting begins to be sure you can see and hear each member and that they can hear you. If you wait until the last minute, you could end up with board members who can hear, but not see the meeting – or who can't participate at all. One way to **include everyone visually** is have each physical attendee look at their laptop when talking, so that remote attendees feel as included as those in the room. Be sure to have anyone in the same room mute themselves when they aren't speaking to minimize sound feedback for remote attendees.

Welcome everyone – and allow for small talk

Make sure you verbally take attendance and record each board member -- both those who are physically present and those who are virtually attending. This way, everyone knows who is involved in the meeting, and it makes them feel welcomed and engaged. Including an icebreaker can allow time for members to get used to the technology, especially those who are using it for the first time. Starting with small talk or an ice breaker will aid in adjusting to the meeting format in a low-stakes manner. Try going around “the room” with a one-word check-in or sharing weekend plans.



Did You Know?

Studies show that having everyone talk about even mundane things at the beginning of the meeting increases their likelihood of speaking up later during discussions.

Prepare notes and agendas early

It is always important to make sure that everyone can easily **track topics and discussions**, but if you have remote attendees, it is even more critical. Those members who can't be there in person must have access to all the details and information they need to participate fully in the meeting. Consider a portal that allows for the documents to be shown alongside the meeting attendees.

Assign key roles

The whole team can help facilitate the meeting, so it runs smoothly. If one person tries to do everything, they could end up attending to matters like time or engagement

– and miss out on key parts of the agenda. Ideally, you should delegate some roles to other trusted team members. There should be someone to lead the meeting who can focus on the agenda (usually the board chair), someone to track time and **take minutes**, someone to prompt virtual members' participation, and someone to do tech support, just in case. When you have assistance in place, your meeting can have optimal participation and run smoothly.

Include remote participants

Make sure you mention remote participants by name and ask for their insights. They're on the board because you value their insights, so ask for information and details as you work through the agenda. Remote members will stay engaged and involved if you make an effort to include them. If they are left to be passive observers, they may tune out entirely. If discussions go quiet, shake things up with something like, "Everyone with an 'R' in your name, we want you to weigh in on this topic!" The goal is to keep everyone's attention and set the expectation that their participation is expected and appreciated.

Use board meeting software

Board software is designed with meetings and management in mind, so using this powerful technology as part of your meeting process will allow your meeting to run smoothly and get as much buy-in and involvement as possible. With the right tools, running a remote meeting is as easy as running one in person in your own board room. Try one out in Boardable during a **no-commitment, no credit card free trial**.



Pro Tip

Have in-person attendees speak and look into their laptops to give virtual attendees a similar presentation experience as those in the room.



Are Hybrid Meetings Right For You?

There are both benefits and drawbacks to hybrid meetings. Assuming that you are permitted to run a meeting with remote attendees by both your own governance and the laws of your state, you should consider the following pros and cons as you decide if hybrid meetings are right for you:

Pros of Hybrid Meetings

- You can maintain a schedule, even if all your members can't physically attend the meeting.
- You can **increase the diversity** of your board members' backgrounds and experience when you aren't confined to a geographic area.
- You won't have to delay or miss out on making important decisions if environmental circumstances change.
- You will likely have better attendance and more willingness from board members to meet, if they don't have to account for commutes and logistics.

Cons of Hybrid Meetings

- Remote members may not feel as engaged or involved and could tune out during the meeting.
- You need to take extra steps to facilitate the meeting, including **shaping the agenda** and incorporating participation from remote members.
- You'll need to work with more technology to get the meeting going and to allow for full attendance.

Make the most of the hybrid meeting process, and you won't have to worry about obstacles that make it hard to attend meetings. Just remember– the most important thing about hybrid meetings is to make them meaningful. In order to do that, you will need to think creatively about how to draw participants into conversation, especially those who attend the meeting virtually. With careful planning and forethought, you can have the best of both the virtual and physical meeting in an engaging, convenient, and effective hybrid meeting.



Pro Tip

Be sure to get regular feedback from meeting attendees about what worked well or could improve in the hybrid format. This could be rating a few qualities of the meeting numerically or offering a one-sentence summary of their experience.



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Built by nonprofit leaders, for nonprofits. Boardable empowers you to work more effectively with your boards and committees. We know the frustration you feel (and the hours you lose) just from organizing a meeting via email, phone, and text. We've lived it. We're from the nonprofit world, too. After looking around for the right tool but not finding it, we decided to build it. Boardable is a software platform that centralizes all communication between you and your board. Find the best meeting times, securely store all of your documents, archive discussion threads and more—all in one place.

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