Guiding Principles for Hybrid Meetings
Tip Sheet for All U of A Staff

WHY THIS MATTERS?

As we start to transition back to in-person connections such as meetings or team events, it’s important to recognize not everyone will be able to attend at all times. It’s key that we continue to treat co-workers with empathy and respect as we move to a hybrid approach.

VIRTUAL MEETING ATTENDANCE

There are a variety of reasons a meeting participant may be attending virtually:

Work from Home Arrangement: The individual may have been approved to work from home.
Illness or Injury: The individual may be on a remote working arrangement due to illness or injury and/or recovery.
Family Status: The individual may be working remotely due to family status reasons, for example, school closures, daycare closures, child's bus cancellations, caretaker responsibilities due to illness or injury of a family member.
Personal Matters: Home emergencies such as flood or furnace outages.

GUIDELINES

1. Participants
   - If a participant needs to attend a meeting virtually, it is their responsibility to contact the meeting organizer in advance of the meeting and advise they will be attending the meeting virtually.
   - It’s the participant’s responsibility to ensure their manager is aware of circumstances preventing them from attending in person.

2. Meeting Host/Organizer
   - It is recommended that meetings have a virtual link available in case participants are unable to attend in person.
   - Even if no one has asked, you are encouraged to be prepared for last minute unforeseen circumstances.
   - Ensure all meeting materials are available electronically and shared prior to the meeting (if possible).
   - During the meeting ensure virtual participants can hear/be heard and include them in discussions.
   - Respect the participants privacy and please don’t ask why virtual attendance is required.

3. Meeting Participants
   - Do not speculate/question or make assumptions as to why someone is attending virtually.
   - If you know the reason someone is attending virtually, do not discuss it with others.
   - Remember to be inclusive regardless of work location.
   - Be empathetic and compassionate, in the future, you may also need to attend virtually.

4. All Participants: Please refrain from saying things like:
   - “Participant” is attending virtually because their child is sick
   - We’ve had to make this a virtual meeting because of “participant.”
   - Why is “participant” not in person?
   - We would have liked to have gone or done this, but couldn’t because of “participant” and having to be virtual.
   - I apologize for not starting this meeting on time or needing a minute to email out the materials but I had to adjust for virtual attendance.
   - “Participant” is never here, what’s the excuse this time?
   - Let me guess “participant” is “not feeling well” again?

Instead:
   - Welcome all participants, in person and virtual
   - When you have participants attending virtually, allow them to introduce themselves and ensure they can hear/be heard
   - Be aware of your body language and facial expressions, you don’t want to project unintended negativity towards the virtual participants.
MANAGING HYBRID MEETINGS

- During the meeting, ensure everyone has an equal opportunity to speak/participate.
- Encourage people to log in from their own laptop, even if they sit in the same room.
- Use the online tool, ex. Chat Box, Whiteboard, Annotate, Poll, Raise Hand etc. to encourage participation.
- If there is a breakout room setting, do NOT organize people in a meeting room (for those working from an office). Request everyone to participate from their own workspace to avoid echo and technical problems during discussions.

WANT TO LEARN MORE?

Human Resources, Health, Safety and Environment (HRHSE) offers a range of options for you to learn more about leading and working in the hybrid workplace. Visit the HRHSE website for tip sheets, resources, and workshops:

- Designing Team Meetings in a Hybrid Workplace
- Strategies and Practices for Leading Hybrid Work Teams
- Creating a Workplace that Works: Learning and Working in Hybrid Teams Workshop Series

RESOURCES & REFERENCES

Managing a hybrid work environment does not mean learning a new skill set; in fact, the “rules” of running a great meeting have not changed much over the years. It does mean being more intentional about how you design and run your meetings to allow for a productive, positive, and engaged experience for all your team members.

Below are a few resources to sharpen your leadership competencies around planning and executing productive team meetings, regardless of meeting type.

Articles

Videos
Academic Impressions. Creating Equitable and Inclusive Meetings. 60 min
Academic Impressions. Leading Effective Virtual Meetings. 62 min
Grady, David. “How to Save the World (or at least yourself) from bad meetings.” Ted video, 6:32 min.

Books
Reed, Karin and Joseph A. Allen. Suddenly Hybrid: Managing the Modern Meeting. Wiley, 2022

Questions? Contact us at: org.learning@ualberta.ca
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