

Best Practices for OLA Hybrid (Virtual & Physical) Meetings

Best Practices for the Board Meeting Host Site

1. Physical board meeting space is equipped with a wired internet connection, projector, screen, laptop, webcam, and polycom-style phone with spiders (additional distributed inputs). Some of these items can be provided by the board or state library.
2. Either the meeting host or the virtual meeting coordinator (i.e., the ALA rep) arrives 30-45 minutes early to set up the audio and visual equipment.
3. Check lighting so there isn't a lot of glare on the screen for virtual participants.

Best Practices for Virtual Meeting Coordinator (i.e., the ALA rep)

1. Prior to the board meeting, schedule the GoToMeeting instance (see Instructions for Scheduling a GoToMeeting Virtual Meeting documentation), put the meeting info on the OLA Calendar, and share the GoToMeeting link with the OLA Board President to distribute to board members before the meeting.
2. Send those who specify they will be attending virtually the link on how to get started with GoToMeeting and where to find GoToMeeting troubleshooting help (<http://www.gotomeeting.com/online/support>). Prior to the board meeting, practice using GoToMeeting with any board members who are unfamiliar with the technology. Also provide your contact information so virtual participants have a back-up plan if they can't get connected at the beginning of the meeting.
3. Prior to the board meeting, work with the host site to make sure they have the appropriate equipment for hosting the hybrid meeting: polycom with spiders (VoIP or analog), laptop, webcam, projector and screen. If they need to use the OLA-owned equipment, make sure it is available for the day of the meeting. Practice a GoToMeeting session prior to the day of the meeting to make sure both the audio and video components are working.
4. Arrive 60 minutes early to the physical meeting to set up the audio and visual equipment (or schedule a replacement - the Vice President).
5. Interact with meeting participants 10-15 minutes before the meeting begins to make sure the technology is working for everyone.
6. During the meeting, monitor the chat board to make sure virtual participants aren't having any technical issues. Do periodic check-ins with the virtual participants to make sure they are still okay.
7. During the meeting, rotate the webcam so the physical participant who is speaking is visible on screen (including during the initial introductions).
8. During the meeting, pull up the shared Google Doc that all participants (physical and virtual) can contribute to. This shared doc will be displayed on screen (when other visual meeting aids are not being displayed) and should be used to record discussion notes and action items. This Google Doc will serve as a whiteboard to engage all participants and make sure everyone is on the same page.

9. Display other meeting documents on the screen at the appropriate points in the meeting.
10. Outside of the meeting times, maintain the GoToMeeting documentation and the Hybrid Meeting Best Practices documentation.
11. Outside of the meeting times, train the Vice-President to serve as the backup Virtual Meeting Coordinator.

Best Practices for the OLA Board President

1. Start a shared Google document to use for tracking discussion notes and action items during the meeting.
2. Before the meeting, distribute the GoToMeeting link and the Google doc link with board meeting participants.
3. Before the meeting, ask for RSVPs and for participants to specify if they will be attending virtually or in-person. Pass the virtual attendee information to the Virtual Meeting Coordinator.
4. Include an anticipated action item for each agenda item. Include the main speaker for each agenda item. Don't include committee reports or one-way communication where no response from the board is required. Instead distribute these reports prior to the meeting via email or the board website. Provide written questions for discussion items in advance to allow for reflection.
5. At the beginning of the meeting, ask all participants to remove distractions and to refrain from (too much) multi-tasking. Remind everyone that their input is valuable.
6. During the meeting, take the group's temperature often either through the use of polling or through direct questions that include both virtual and physical attendees. Make sure that there are frequent opportunities for input (e.g., every 6-8 minutes) and that facilitators don't dominate the air time.

Best Practices for Virtual Attendees

1. If you haven't tried out your video or sound options with GoToMeeting before, contact the virtual meeting coordinator for a practice run prior to the board meeting.
2. Arrive at the meeting 10-15 minutes early to do any sound or video troubleshooting.
3. Use a webcam (this enables other virtual and physical participants to respond to your visual cues).
4. If all six webcam slots are filled, virtual attendees who will be speaking have webcam priority. Use chat to negotiate this with the other virtual attendees.
5. Use a headset, mic, or phone you have tested before the meeting.
6. Turn your headset or mic on mute when you aren't talking to avoid audio feedback issues.
7. Don't multi-task.
8. Participate in a quiet space with minimal distractions to minimize disruptions.

Best Practices for Physical Attendees

1. Speak up and don't mumble.
2. Contribute to the shared Google doc.
3. Remember to leave space in discussions for virtual attendees who would like to talk.

Best Practices for All Attendees

1. In lieu of including unit reports during the board meeting, fill out the unit report form in MemberClicks with your unit's activities since the last board meeting. Make sure to note if any items warrant discussion or action from the OLA board.
2. Read everyone else's reports prior to the board meeting.

Resources

[ACRL-OR Board Blended Meeting Survey – May 2015](#)

[Designing a Distraction-Proof Virtual Meeting](#)

[Luminosity Global Consulting Group – Virtual Meeting Best Practice Checklist](#)

[Productive, Invigorating Board Meetings](#)

[Six Critical Success Factors for Running a Successful Virtual Meeting](#)

[Structuring Successful Virtual Meetings: A Counterintuitive Approach](#)