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Guidance for Chairing or Setting up Blended meetings

Guidance for where some participants are
'Roomies' in one or several rooms and others are
'Zoomies' via their own video / audio account



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How to quick read and use this document:



This toolkit contains hyperlinks to further articles, recommended products, videos and connected resources. You will find these via any icon or symbol throughout the document.



1) Introduction

A recent McKinsey survey suggests that 90% of organizations will adopt some combination of remote and on-site work as they emerge from Covid restrictions. This new model will bring with it a dramatic change in how we meet - a blended mix of in-person attendees and remote meeting participants seems an inevitable component of our 'new normal'.

We are passionate about the changes that are coming about due to the changing nature of how we work. The technical challenges of running blended environments well, will mean that humans will have to think, prepare and collaborate more to make blended meetings effective for all participants, whether they are in a room with colleagues or joining in remotely.

Blended meetings are currently also referred to as 'hybrid' meetings. This is because there is a lot being written about hybrid working patterns and hybrid working arrangements. We prefer the term blended as meetings are significantly affected by a blend of factors - some of which are technical, some of which are cultural. The 'social-technical system' remains to be a whole area of organisational studies that has a lot to inform us about how to think about the realities of the cultural changes and cultural choices that we are making in how we run meetings.

We are hearing that those starting to run blended meetings are running into problems, yet most of the world don't seem to be ready to work out what to do. Some extra thinking now will ensure that we can avoid the pitfalls and actively embrace this new way of working - this is all an opportunity, it is inevitable.

We expect the reality will be that over the next couple of years the change in culture will be bumpy. We want:

- To make that smoother
- Equality and parity of esteem
- To live and work within the resources of one planet.

We want that now...and in the meantime this shift is part of that jigsaw.

We have collated this document to provide practical guidance and checklists for running blended / blended meetings.

Blended meetings are more complex than meeting in-person or virtually. They are easy to do poorly and hard to do well. You will find that with just 20% more effort you will reap 80% more return. Just as managers learned how to run great virtual meetings over this past year, they now need to learn how to conduct great blended meetings as well.

As Satya Nadella, Microsoft's CEO recently put it:

“ We want to ensure those joining remotely are always first-class participants ”



This guidance document contains short guidance on the many different aspects of hybrid / blended meetings. The guidance has been researched from published best practice, plus a 2-month action research project that we ran with EVOC, a support organisation for Edinburgh voluntary sector where different styles of blended meetings were delivered and evaluated. Our focus is on 'meetings' rather than full scale events or conferences, though much of the advice is transferable.

a) What is a Blended Meeting and Why Are They So Difficult To Run?

Blended meetings are meetings where some of the participants are in a room together and some are 'remote' eg, working from home or another office, for example.

Blended meetings can be much harder to lead well than all-in-the-room or all-remote meetings. Why? Because there are norms around running in-person meetings and norms around remote meetings, but with a blended meeting you need to run both face to face and remotely and add on top the interaction between the two.

If even one participant is remote, you might consider having a 'one remote, all remote' policy especially for quick meetings on the basis that this levels the meeting playing field. However, there are benefits of blended meetings that make them worth the effort.

b) Why Choose Blended Meetings?

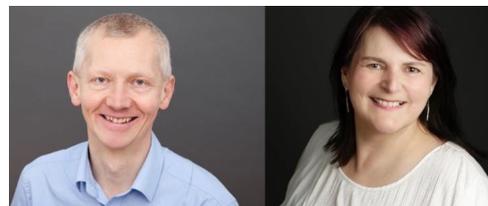


“ Work is not a place.
It's what you accomplish
together ”

Jim Kalbach

Blended meetings offer an innovative solution to engage with all participants. Some advantages include:

- **Improved sharing and collaboration** by allowing more people to join more meetings, contributing when they might not otherwise be able to join in person due to time, accessibility, or distance restrictions
- **More sustainable** - by reducing the number of attendees traveling long distances and their associated carbon emissions
- **Decreased costs** - travel costs (eg, meals, hotels, transport costs)
- **Increased flexibility** allowing you to flex between in person and remote, depending on circumstances.



c) Why Are Blended Meetings So Difficult?

Social Struggles

There's an important social component to how people come together in a physical setting. Working together in the same space enables connection which is harder to develop online. In a recent survey by Miro (digital white board) about remote collaboration, the biggest frustrations highlighted were missing social connection with colleagues, lack of spontaneity and difficult communications. In a blended meeting there is a risk that those who are remote can feel out on a limb. Therefore, the challenge is to fix the imbalance and ensure that everyone feels equal. There is a fear that we will revert to excluding remote participants instead of enabling them to participate equally and that those who choose to go into an office will be treated as 'first class citizens', promoting an 'us and them' mentality.

Hallway conversations, pre and post-meeting chats also happen naturally when in person. It's not uncommon for people going in and out of meeting rooms to talk about the topic at hand. Sometimes, decisions are even made during those unofficial conversations - in those cases, those that are remote are left out.

Audio Problems

'Can you all hear me?' How many times have you heard that over the past year? During blended meetings there is the risk of an imbalance in audio signal. For 'roomies' (those in the room), the distance from the mic may make their voices louder or softer. People who are remote may also be using different mics and devices. The net effect is an unequal audio signal for participants which can lead to comprehension and audibility issues. The second big effect of audio is that background noise can be a real distraction if you can't visually see it.

Visual Problems

The human brain wants to conceptualise the visual environment that the meeting is happening in. We also need to conceptualise who is in the meeting visually and have shared documentation that works for everyone visually.

Technical Difficulties

We're all familiar with Zoom calls stalling and Wi-Fi connections going out - just about everyone has been forced to use a tool that they don't understand. Technical issues on both the hardware and software sides are a major challenge for hybrid teams, even the smallest technical difficulties can cause large interpersonal issues within a hybrid team.

Whilst blended meetings do have their struggles, you and your teams can avoid or reduce the negative effects. By leveraging technology and tools, being thoughtful in design and by providing strong facilitation, we can create blended meetings where all participants feel engaged, valued, and equal.



d) Should this be a Blended Meeting?

Questions to Ask Yourself

Do we really need a meeting?

Focus on fewer and better meeting. Do you really need to meet? Prioritise asynchronous work and use meetings to be creative and do something together rather than simply for sharing information. If sharing information, consider alternatives including sending video messages with opportunities for a Q&A.

How complex are my objectives?

Sometimes complexity is a more helpful framework for determining what form a meeting should take. This includes emotional complexity and the level of interdependence that certain decisions or outcomes may require. A highly complex meeting eg, conflict mediation would benefit from being purely face-to-face, whilst less complex or task-based objectives are generally suitable for virtual or blended meetings.

Do we have the resources to deliver a great meeting?

Blended meetings when delivered well are brilliant. However, a poor blended meeting can be damaging to relationships and outcomes with individuals feeling side-lined or even alienated. Blended meetings should only be run if sufficient planning and people / tech resources can be put in place. We recommend that at least two people are involved in running the meeting and that the room also needs the appropriate audio-visual technology.

For those in person, does everyone feel safe to gather?

Depending on COVID-19 guidelines and social distancing, is it appropriate to gather in person? If not, run the meeting online.

e) Key Principles for How to Run Great Blended Meetings

Get the meeting basics right

A blended meeting is first and foremost a meeting! Spend time designing and preparing to ensure the session delivers objectives, define your aims and arrange your agenda to fit.

Plan and conduct the meeting to maximise participation and engagement for ALL attendees

Recognise that engagement is the key. Consider how to include every participant - as when people feel seen and heard they then believe the meeting is worthwhile, which in turn leads to better results.

- Review each activity or exercise focusing specifically on how both remote participants and face to face participants will engage. Consider what tools and techniques - digital or otherwise - can be used to maximise their interaction with the in-room attendees.



Define clear roles and responsibilities for meeting delivery

Blended meetings are complex and it is difficult for one person to manage a blended meeting alone - we recommend having two people in roles that help the meeting happen on the day.

Embed a positive meeting culture

Agree ground rules upfront and keep to them - be a model participant, make collaboration the norm, track performance and adjust to fit.

Select the best technology and tools to enable objectives

Technology is amazing, but work out what you want to achieve and then fit the tech around it.

- Explore the latest in technology. As providers invest heavily to better enable blended meetings, new features are being introduced to improve face-to-face communication
- If cutting edge technology is unaffordable or unavailable, a little ingenuity can go a long way to create a high-quality video experience for everyone.
- Test the audio / visual set up before the meeting for both in-room and for the remote attendees.
- Ideally schedule a 10–15-minute one-on-one dry run to get remote participants comfortable with what they will see and hear during the meeting as well as to review any software features they'll likely be asked to use. It's well worth the brief time required.

Increase visibility - make remote participants full-sized

Adapt your set up to make those remote as visible as possible to roomies

Experiment, review and adapt

This is new stuff for most of us, so try new techniques - ask what works and what doesn't and experiment again.



2) Planning and Preparation

a) Get the Meeting Basics Right

Meetings are a key mechanism by which we: generate enthusiasm, inspire creativity, build ownership, engage diversity, reinforce culture, nurture teamwork, grow people, sell ideas, develop solutions. Done badly, however, they can also deliver the opposite!

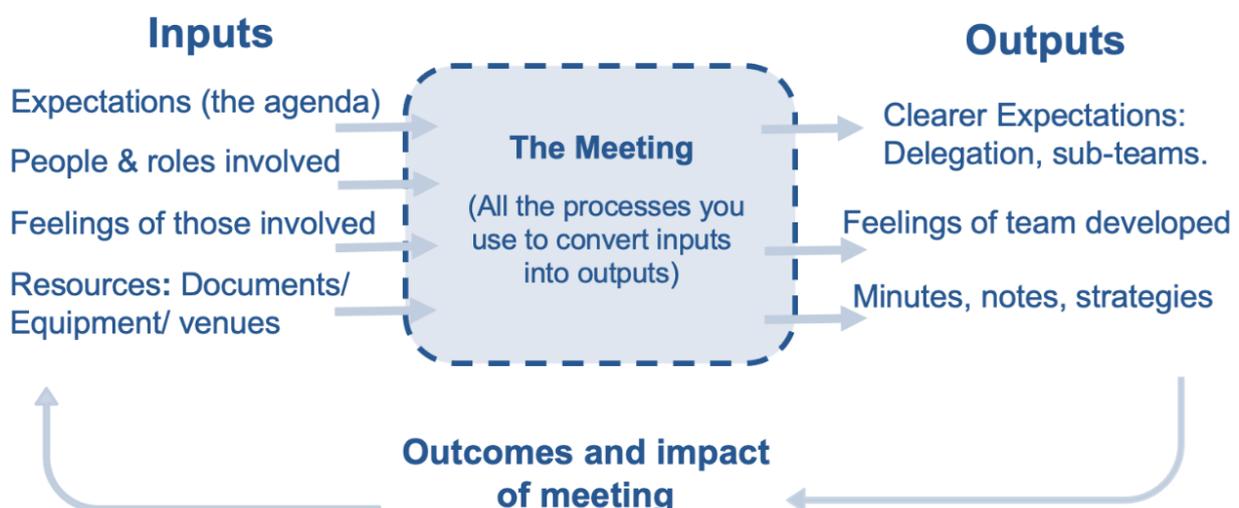
But what makes meetings effective?

A clear objective and a good agenda to deliver that objective are certainly key. How people participate is also fundamental to outcomes. When good structure comes together with good participation, then meetings can be truly effective - even transformational. For this to work, the structure needs to provide what is necessary for good participation.

Remember the 3Ps Venn Diagram: Purpose, People and Process

- Consider the purpose and ideal outcome first and foremost. Never forget you want an outcome, not a meeting!
- Aim to have fewer, better meetings – enabling work to be happening through other methods and increasing the excitement and expectations of having meetings.
- Consider who should be invited and what are their specific requirements?
- Don't just focus on the rational requirements - also consider the experiential requirements, ie how do you want people to feel both in the meeting, and as an output of the meeting?
- The open system meeting planning tool diagram below summarises the headline considerations
- Pick attendees based on the expertise you need, not on location.

Open System Meeting Planning Tool





Preparation is the fourth 'P'

- Plan content around the blended 'limitations' – plan for engagement so that no one loses out
- When possible, book a conference room with existing AV capability - particularly a large TV or projector.
- Preparation - brainstorm the common issues and have a plan B.
- Make sure the equipment is right and there is time to set it up.
- Assign key roles in advance, eg producer / facilitator.
- Use the checklists and guidance in this document.
- Send something in advance about the nature of the meeting to set expectations.
- Review the access needs of participants – what are the specific requirements of attendees?

Plan the Meeting to Maximise Participation and Engagement for ALL Attendees

Make sure there are multiple ways for individuals to contribute, whether it's talking, showing, or reading. Keeping everyone focused on a purpose will help them stay engaged.

Balance showing with doing

Any meeting where work primarily gets done through talking can be slow and tiring and elevate extroverted or leadership voices. It is hard enough to unmute in a fully remote meeting, but even harder to cut in virtually when you are interrupting a bunch of people in a conference room.

Provide space for people to ready themselves

Allow time at the beginning for everyone to have a moment to settle into the meeting and to be totally present as their best selves.

Plan for check-in sequence (see checklist)

You also need to plan time for the complete check-in, including auditory and visual checks with every individual as they introduce themselves or at least say hi.

Make the meeting relevant

Explicitly engage people in the why, what, and how of the meeting - make it real and relevant to their heart.

Plan to co-create in different ways.

The best meetings allow participants to provide input using different modalities — by writing, drawing, speaking, or voting. This includes solo thinking time and then shared discussion time where these thoughts are added to a shared space such as Mural, Google Docs or flipchart.

Design the meeting as if everyone were remote

Put yourself in the attendees' shoes by imagining yourself on a video call trying to follow along and contribute. For larger sessions, it's worth doing a dry run.



Plan for team participation

Think through how the group or team will be going through the high points and low points of forming, storming, norming and performing.

Avoid physical documents

Flip charts, writing on whiteboards - unless you are set up to share them live so that everyone can see eg, IPEVO camera or camera focussed on flipchart.

Encourage real-time online collaboration

If you don't have a large interactive display in the conference room, it's okay to ask people to bring a laptop to the conference room and collaborate via digital documents like Google Docs or Miro boards.

Track the perceived value

Use feedback to drive insights which improve the process and the people.

b) Ensure Equal Participation and Inclusivity

The aim of blended meetings is to encourage equal participation between remote and co-located attendees, otherwise, it could lead to in-person dominated conversations and decision-making. However, conversing and taking turns is much easier when face-to-face. The pace of an in-person conversation can easily overtake the rate at which remote teammates are able to contribute - this might have real consequences on leadership and even promotions.

What's more, differences in communication patterns may be exaggerated with blended meetings. For instance, extroverted individuals tend to interrupt more frequently than introverted ones. For remote participants, there may even be a heightened gender bias in the conversation - an introverted woman joining a meeting full of extroverted men may not get a chance to speak.

To address this, include intentionally designed activities in your meetings to ensure balanced communication and equal participation.

c) Define Clear Roles and Responsibilities

When planning the meeting, carefully and explicitly assign roles. It is possible for one person to have several roles eg, one person may be meeting chair, facilitator, meeting organiser and participant. Blended meetings are complex and it is difficult for one person to manage a blended meeting alone, so we recommend having at least two people in roles that help the meeting happen on the day.

You might also split up roles into smaller chunks eg, splitting up the producer role to have one person focussing on scribing and another focussed on in-meeting tech support. It doesn't matter what you call the roles or how you split them up, as long as each of the activities has been allocated and that each individual understands what is expected of them.



d) The Key Roles

Chair (host) The person responsible for the meeting outcome.

Facilitator Responsible for ensuring the meeting follows meeting process and that all voices are heard. For larger meetings, it may be helpful to have co-facilitators (one in each space – room, online, breakout room etc).

Producer A technical & supporting role – setting up the room, ensuring the technology works, answering technical questions, managing breakout rooms and online tools, and reviewing the online chat channel to call out to the chair anything that is being raised online.

Organiser The person who arranges the meeting logistics.

Meeting participant Attendees ie, those contributing in the meeting to the defined outcome.

IT specialist Not an attendee, rather the on the ground expert in the network / equipment.

The Chair / Host will:

- Define the purpose of the meeting.
- Be clear in advance of the meeting what type of meeting is being held: virtual, face-to-face, or blended.
- Create and send the agenda, sending relevant papers in advance.
- Ensure that any pre-work is clearly defined and that attendees are aware of expectations.
- Agree roles for the session, pre-briefing those with roles.
- Ensure they have a personal understanding of the tools and techniques that will be used on the day.

The Facilitator will:

- Guide the meeting and keep it on track. The Chair / Facilitator should draw all participants in, keep them engaged and ensure their voices are heard, not interrupted or talked over.
- Facilitators can break upside-conversations to ensure there is only one conversation at a time.
- Empower remote teammates: adopt a remote-speaks-first approach.
- Re-balance power dynamics: if a debate starts between two people in the room, a facilitator can slow the conversation down by including the group.

The Producer will:

- As well as being technical support, this role ideally can step into any of the other roles as needed on the day eg, in case of technical difficulties.
- In the room: Setting up and testing the technical kit in the room – screens / speakers / laptops / tools.
- Completing audio / visual checks with remote participants and / or other venues.
- Reading out 'chat' messages for the attention of the facilitator or chair.



The Organiser will:

- Book any meeting rooms.
- Confirm the capacity of the room being used.
- Manage who will attend from those rooms.
- Issue meeting invitations and dial in links (Zoom, Teams etc).
- Prior to the meeting, distribute a list of invitees and attendees, noting each person's location next to their name.
- Ask anyone with additional requirements to contact them in advance of the meeting.
- Ideally schedule a 10–15-minute one-on-one dry run with remote participants in advance to let people know what will see and hear during the meeting, as well as to review any software features or new tools that are planned for the session.

The IT Support Specialist will:

- Advise on the AV capabilities of the rooms being used.
- Help the producer set up the laptops, mics, cameras and other equipment prior to the start of the session.
- Be 'on-call' in case technical issues arise in the session.

With remote participants:

- Responsible for managing the meeting settings (both before and during the meeting), the meeting lobby, and giving presenter permissions to others in the meeting.
- On-boarding participants, for example conducting audio checks – troubleshooting.
- Setting up break out rooms and supporting those who leave their breakouts.
- Sharing links to tasks and documents in the chat box.
- Watching the timer and sending messages to breakouts.
- Harvesting outputs – polls, documents etc and making it available afterwards.
- Recording (including pausing during breakouts and breaks) and disseminating the recording.
- Managing a 'backstage' communication channel (eg a messaging app) between Facilitator, Producer and others as required.
- Limit noise – managing muting of online participants where significant background noise.
- Check the attendees - challenge anyone that is anonymous or who shouldn't be there.
- Moving cameras / mics to ensure online participants can see and hear.
- Monitor requirement to ensure participants in the room can see and hear those online.
- Take pictures of content in the room and send to online participants so they can see content up close (if required).

Each Meeting 'Participant' will:

- Turn up, be fully present, ready to fully participate and to deliver the outcome.
- Provide support for other participants.
- Ask for any support needed to give their best.
- Assess how things were done and their part within that.



e) Embed a Positive Meeting Culture

It is important that there are ground rules on how the meeting will be run. With a regular meeting, these should be co-created by all attendees. For a one off, the meeting Chair can provide guidance at the start of the meeting about how the meeting will be managed.

Consider the following ground rules:

- How everyone indicates that they want to speak. If it's a presentation where questions will be taken, the Chair should explain how this will work, for example, by posting in the chat or raising your hand.
- Don't use equipment that excludes people, for example, gathering around a whiteboard or flipchart. Always consider web-based solutions so that everyone can take part.
- All conversations, discussions, brainstorming, and decision making should happen while the video / conference call is still on.
- No side conversations allowed between the in-person participants during the meeting.
- Welcoming – that all attendees may interact and participate in the meeting in a way that is suitable for their needs eg asking questions in the chat rather than verbally.
- Everyone should engage in a way that includes all participants. Someone may be lip reading, so it's important that you turn on your laptop camera and face it.
- Allow enough space and time for the remote participants to contribute to the conversation.
- Everyone is responsible for being 'present' in the meeting. Work in terms of inclusion as we move to blended working. Think about how you're working impacts on the experience of others, include all participants and give them equal footing in the meeting.
- Those calling in remotely should have their video on unless there are exceptional reasons not to.

Click the relevant link icons for examples of guidelines and a template on creating your own ground rules for remote / blended sessions : instructions and template:

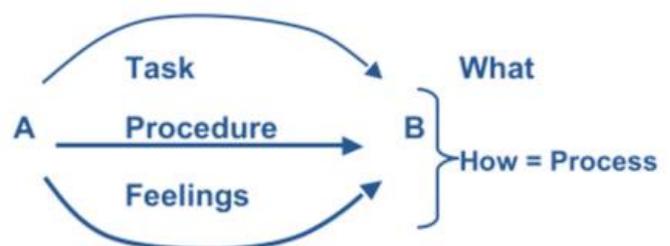


f) Relationships and its role in Meeting Design

Building relationships is one of the key purposes of meetings. They build role relationships between role holders in ways that are structured. Each human is part of the context of a team - that team is part of the context of an organisation, just as the definition of carrying out an appraisal is 'managing somebody's performance in relation to their team'. Equally, meetings are a way of constantly connecting roles and role holders - this can be illustrated in the diagram around A to B.

How you want to get from A to B?

A team process involves the content task, the process by which you get there and the feelings involved. The processing of feelings during team processes, such as meetings is an exceptionally important part of meeting design



It is an aspect that is often not considered well enough.



Role Inviting and Table Design (also see page 21 ‘Setting up the Room on the Day’)



Core aspects about meeting design include:

- Inviting the correct people with their specific roles and relationships.
- Setting of these right people in the right places during the meeting.

Good meeting design ensures physically well positioned roles which makes it easy to bring in the right voices at the right point of the meeting - classically this is done by the role of Chair of the meeting

These structural factors affect the functioning of role and relationship building in the meeting - these are not accidental design parameters. For a good meeting, plan the seating. As part of the introductions, also brief the roles or ask people to articulate their own roles - this helps everybody take up that role in relation to the crucial task.

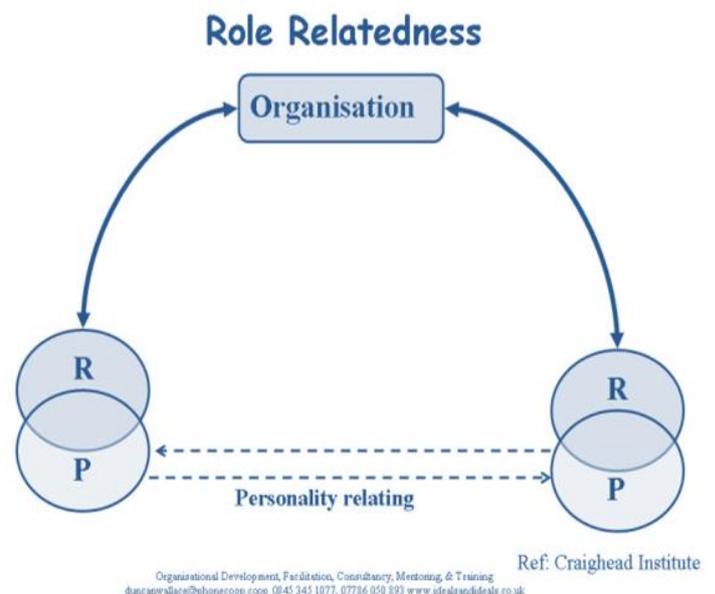
When planning the objectives of a meeting, include connection as an outcome and also specify what role related interaction is needed to enable the work to get done.

Within a meeting, authority is very important. Therefore having the right roles, relating in the right way, at the right point enables a range of processes to be facilitated.

Imagine a climate change conference like COP 26 not having a seating plan and an invited list plan...there would be no chance of a constructive meeting!!

In terms of the social technical system, this is the social aspect that enables the correct performance of role. This is very well illustrated in *The Checklist Manifesto* book which describes the importance of checklists by role for such important activities as surgery teams doing an operation or flight crews in a plane taking off.

Relevant checklists in those situations ensures that each individual knows their role and the role of everyone else in the team. From the beginning, in those circumstances, everyone knows each other’s names and have the right information to do their job effectively. We have included a checklist within this guidance document specifically for that same purpose.



The important debate about hybrid working patterns needs to lead to more precision and consideration about organisational design and right role relationships. It is important for the ways that we work together across organisations, structures, hierarchies and cultures and that we learn each other's roles by being together.



3) Running the Event on the Day

a) Checklist for Setting up a Blended Meeting Environment on the Day



Please click on the icon to take you to the appendix which contains the checklist:

b) Technical Summary – Why the Tech Matters

The physical set up of a blended meeting is key. When some people are together and some are not, it is very difficult to pay the same amount of attention to the remote participants as to the ones in the room. There is much more information coming in about the people who are physically present - their body language, expressions, movements - than about the people who are only present when they speak. In this situation, people who are not in the room may justifiably feel they are not an equal part of the meeting, so setting up the meeting physically so that everyone can be seen and heard is important. If you can - and for key meetings - you may wish to hire a dedicated conference room with up-to-date technology. If this isn't possible, the following sections will walk through options for consideration.

The next decade will see a plethora of innovative Sci-Fi-inspired blended technologies from life-sized displays to immersive whiteboards. However, there are relatively inexpensive things we can do right away to set up our blended teams for success, which we will cover in the following sections.

IN THE CONFERENCE ROOM

AT THE HOME OFFICE

Audio Hardware

Update the audio hardware in your conference rooms.

Headsets

Get headsets for your employees.

Large Display Screens

Get multiple large display screens to show content and people who are attending remotely.

Home Display Screen

Get a second display at home.

Video Conferencing

Ensure you have the best video conferencing tool for your needs eg Zoom's upcoming smart gallery that democratises blended meetings or Around's great no-echo audio technology.

Video Conferencing

Pick a tool where remote team members can clearly distinguish and hear who is talking in a larger conference room.

Wide Angle Cameras

Wide angle cameras help ensure all attendees are visible - position them so that no one is backlit.

Ring Lights

Invest in ring-lights for employees so that they aren't back-lit.

Interactive Displays

Bring in interactive displays that use digital whiteboards instead of physical whiteboards.

iPad or Tablet

Use an iPad or a tablet with a stylus to allow remote team members to "draw" on whiteboards.



Click the link icon to access an 8-minute video which gives a great overview of setting up all the kit for a blended meeting.

c) Audio is the Most Important!



As audio is so important, consider upgrading your audio devices. Only one device (laptop, phone, teleconference line) should be used for audio.



Lookout for a combined speaker / mic which can pick up the sound of a whole room. For example, this is a Jabra Bluetooth speaker – which is the size of a hand and can be placed in the centre of the table. Jabra Speakerphones are excellent quality and are worth the investment (from £80).

Test your audio in advance to ensure it will pick up everyone who is speaking to it and listening through it.

Multiple mics in the same room should be avoided as this creates feedback noise. Alternatively, supplement your audio input by having in-person attendees pass around a hand-held microphone before speaking (a talking stick). Over the next year, we anticipate that many rooms will have the ability to mix sound that enables multiple mics to be used simultaneously.

The biggest audio risk that we found out during our pilot programme in summer 2021, is humans in the room opening their laptops to join in with an online aspect of the meeting and not knowing how to silence their audio - we found that every time this happened it took up to 10 minutes of disruption.

Muting / Silencing and bringing back together

- If you're the Facilitator / Chair in the room with roomies, then you can't silence the conversation on screen (because you need to hear how it is going).
- You can mute your room from the screen.

Remote participants say consistently that having a good sense of the whole sound of what is going on in the room environments help them feel in the room with people.



Whereas, having distracting noises from the remote participants tends to distract people, hence recommend remote participants use headsets / quiet rooms.

If roomies also open the meeting on their laptop, take time to explain how to switch off audio on their device to avoid feedback noise.



d) Getting the Visuals Right

The objective with visuals in a blended meeting is that everyone can see each other clearly as well as the documentation. This means a combination of a range of cameras, large display screens and where feasible interactive displays. It also means understanding and using the latest functionality of your video conference supplier.

Cameras

Wide-angle free-standing camera via USB (for flipcharts as well as room)

- Set up several cameras to capture the action in the room, rather than relying on a single camera.
- Remote participants want to be able to see a whole room view - we therefore recommend having a wide-angle camera showing the whole room. Plus, if you are going to use a physical flip chart, have a camera that can focus on the area of the room in question.
- These cameras can be mounted on a tripod or this one above the screen is blue tacked on!!



Click on the icon for an example of a suitable wide angled screen cam. (from c£25)



Meeting Owl - want to upgrade and have the budget? A meeting owl is a plug and play webcam, mic and speaker that tracks the active speaker in the room – click on the owl to go to their website. An owl starts from £999.

Tripods - which are portable - make a big difference to the choices of camera angles and are well worth using

Click on the each of the icons for videos on how to set up multiple cameras:



Another sort of camera that might be helpful is a 'document camera' - a document camera allows users to project documents and other objects on a screen or television, so they are brilliant for sharing live demos where someone is using their hands eg drawing or to share analogue documents that are not available in soft copy. IPEVO document cameras are strongly recommended.



There is also software available that can turn a smartphone into a document camera – click on the camera icon to link to the website.



Large Screen displays

Large screen displays can make a huge difference to being able to see those online as well as documentation, either a monitor or screen and projector. Ideally, show those who are remote on the big screen so they can be clearly seen.

In the meantime, if on Zoom, you can use the 'smart gallery' functionality where multiple feeds can be shown from a single room in a single gallery, making the room attendees clearer for remote attendees. Click on the link icon to access instructions on how to do this. Other video conferencing software also has similar functionality.



What is an interactive display and why you should consider one?

An interactive display is a touchscreen device that allows users to display information and presentations and edit content through touch interactions with a finger or stylus.

- Interactive displays can help increase innovation by allowing for organic brainstorm / creativity to take place in real time
- Interactive displays can help create equitable experiences during blended meetings by allowing immediate access to information and equal participation from all team members, no matter where they are.
- Interactive displays can help increase engagement during meetings, since participants are looking at one main screen instead of their own personal devices.
- Unlike a physical whiteboard, an interactive display automatically saves the information digitally and eliminates the need for follow-up conversations and additional documentation.



Using a digital whiteboard on an interactive display

Some Display Board Options – click the images to access the link



Microsoft Surface Hub 2S – sizes 50" and 85"



Dell Interactive Touch Monitors – sizes 55", 65", 75" and 86"



LG interactive Digital Board – Size 86"

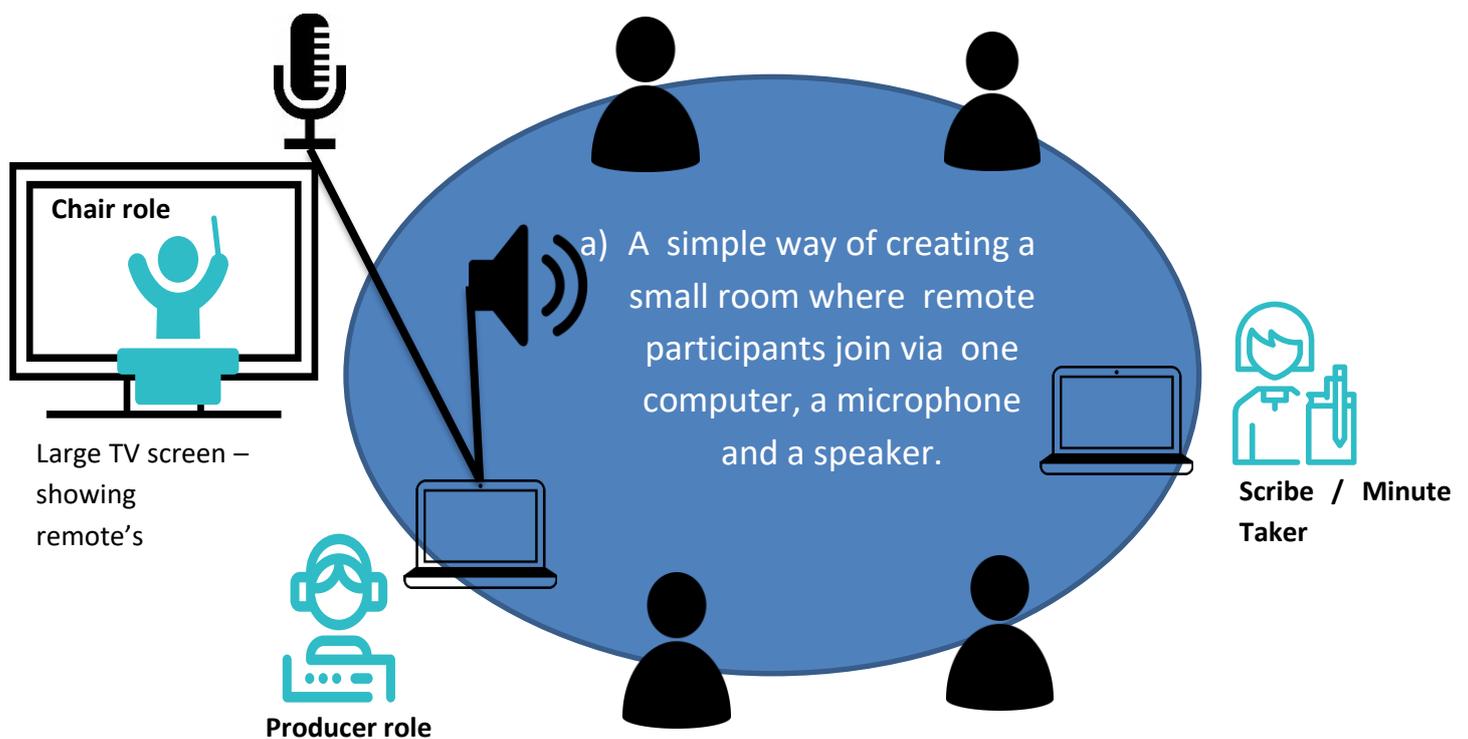


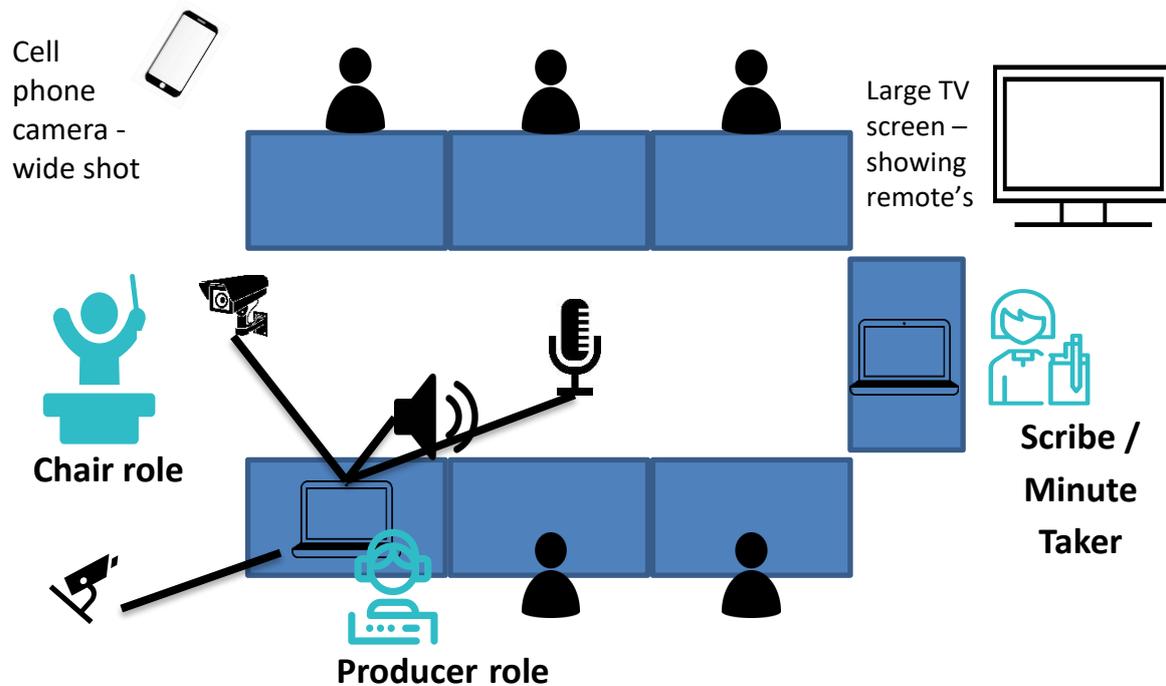
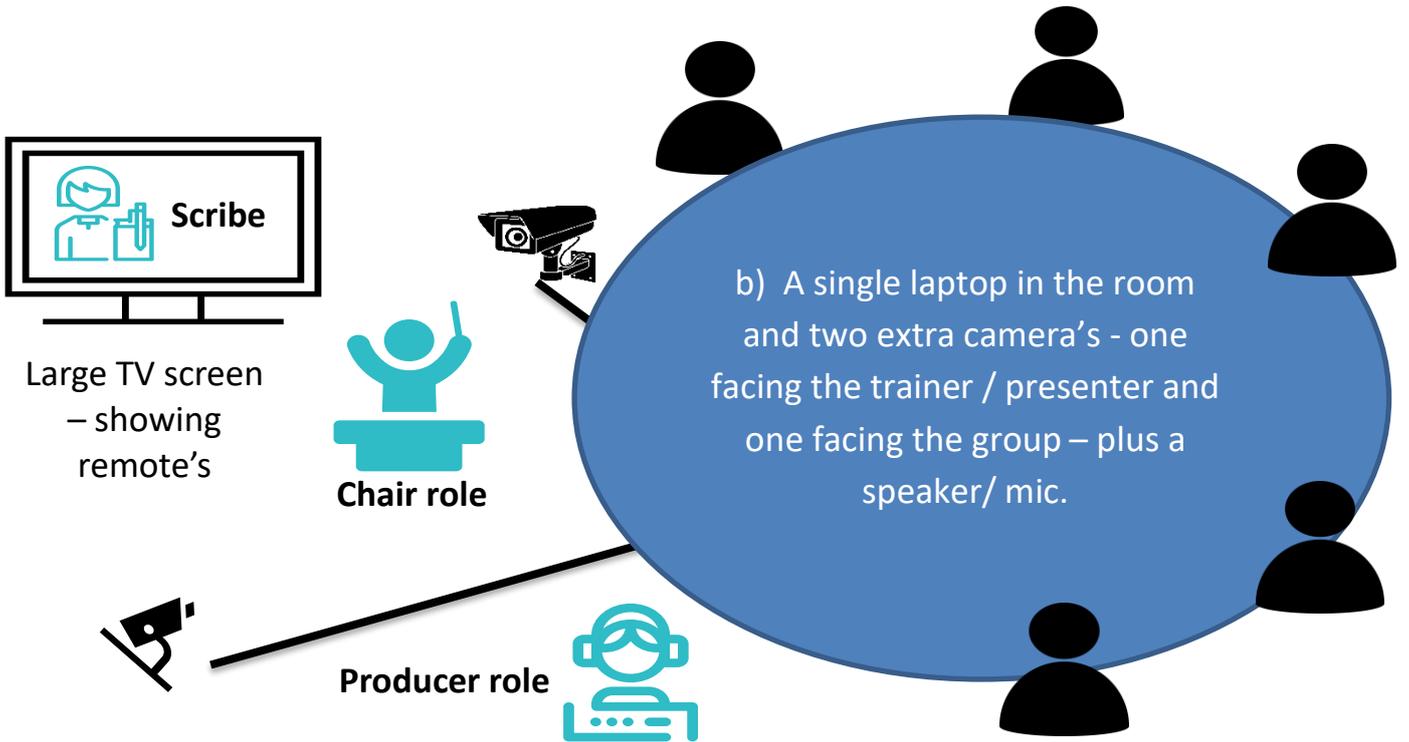
e) Setting up the Room on the Day

It is worth experimenting with different room layouts – depending on number of attendees and the equipment and screens you have available - these layouts give some alternatives to consider. When you are setting up – consider things like:

- Whether you wish roomies to face the camera or face each other?
- Where will be the visual focus point for each of the agenda items?

Also, consider where the key roles should sit. In each diagram, examples of seating arrangements for the Chair, Producer and Scribe are noted.





C) A better set up for visuals - still with just one laptop, but now a mic, speaker and several cameras, one facing the trainer, perhaps a second facing the flipchart and / or two cameras facing different angles of the small group.



For our experiment sessions we were able to contain all our kit in half a bike bag which covered two rooms.

Don't forget, that you may require cables and extension leads so that you can set up in the different rooms.

In this photo you can see how the second room was set up with a mic on the table and a speaker plugged in.





f) Remote Set Up

Top tips for setting up at home as a participant in a blended or remote meeting

Please click on the icon to take you to our appendix with our top tips.



g) Managing Accessibility

Under the equality legislation you are obliged to make ‘reasonable adjustments’ for anyone who needs it to fully participate in your meetings - we expect this to be tested in law very quickly. The good news is that with things like caption software built into most platforms and text-to-speech, there are advantages to the blended meeting environment that come free of charge and are getting better. Switch these functionalities on for everyone as a standard. However, it is still the case that you need to notice and describe what is happening in the meeting.

h) Sharing Documentation / Using Tools

Sharing documents

- Consider the best way for participants to share documents.
- Any papers for consideration should be issued in advance and paper should be avoided on the day, unless individuals choose to print their own copies.
- On the day the ‘Producer’ should have all the documents relevant to meeting already open on different windows on their computer, ready to put up in the shared meeting space as needed during the meeting.
- Encourage those online to split their screen so they can see those in the room and the documents at once (see remote set up).

Collaboration tools

The ideal with collaboration tools would be to use digital collaboration tools with an interactive display in the room. Where this is not possible the alternatives are:

- Someone in the room acts as scribe for the roomies online.
- OR those in the room enter the tool from their own device (phone or laptop).
- OR a scribe translates what is happening in the room onto the digital tool.
- OR flipcharts / white boards are physically used in the room (with a camera on the board) and those who are remote have a buddy to write in their thoughts.

Our recommended tools

- Mural and Miro have incredible meeting capabilities – brainstorming, canvases etc (some onboarding prior to the meeting).
- Jamboard – a very low-tech digital whiteboard but helpful for quick exercises.
- Google Docs – shared docs - presentations, spreadsheets and more.
- Mentimeter – for polls, quizzes and word clouds.



This list of remote tools, collated by collaboration superpowers covers the key tools in the marketplace – click the tools icon to access:





4) References for Deeper thinking

Organisational Change

- At the deeper level this is all about organisational change, systems change and the constant dance of the evolution of what is known as the 'Social Technical System'. To begin reading about the organisational development areas of major technological shift and its effects on organisations, then you could start with Improvising Organizational Transformation Over Time: A Situated Change Perspective by Wanda J. Orlikowski.
- In this article (click the icon) for example, it describes the individual agency that can happen with major technological shifts, all of which must be worked through from a workforce planning perspective with the myriad of negotiations and thinking about working from home/remote patterns that are part of our post covid/ adapting to climate change times. 

Running Blended Meetings

- Harvard Business Review article on how to run a great blended meeting (the key elements of which are included in this document. 
- A great HBR article on whether you should have a meeting at all! 
- This article has tips of about designating leader of meeting, agenda - sending follow up emails, with dates and deliverables, recapping at the end of each meeting is even more important when remote, having retreats alongside the amount of remote working. 
- This link takes you to a great long article from a webspace that is gathering tools, tips and tech for virtual working. 
- A seminar from MURAL about blended meetings / facilitation with a panel of experienced facilitators. 

Supporting technology

- Creating a 5-microphone system around the physical room – good slides illustrating the three types of room and what that means. He suggests audio quality is the key thing to concentrate your design - he also suggests keep to room consistency. 

Blended Working (more generally)

- **Art of Hosting Community Call - Hosting blended spaces** - with Sabine Soeder, Wiebke Herding and Dr Barbara Kruse (April 2021) - they talk about having connectors, acting as buddies during coffee breaks, connecting those in person with those online. 
- A good video about leading a meeting that has blended participants - like explaining how you as host in the room shouldn't put everyone on mute and have a portion of the meeting led by someone online, as well as in the room. 



- There is a full guide to Going Blended by Bizzabo. Most of the guide is geared towards large scale events (100-1000's) where you are planning more like event production and event platform. The network model on page 21 may be a key empowering shift for voluntary sector type networks. On page 32/3 there is a suggestion of events team you may need.



What the Tech Future might look like

- X2O One Room – immersive meeting and learning environments.
- Google's Project Starline looks interesting, but it's still in early stages
- Zoom – here's what Zoom is starting to offer for blended solutions:





5) APPENDIX

a) Checklist of Activities on the Day

PRIOR TO THE MEETING – ON THE DAY		DONE	NOTES
1.	Check the system and location you are using can handle the pressure on the day - if a new location, do this as part of your planning) - strong enough broadband / good enough flow of arrivals / departures.	<input type="checkbox"/>	
2.	Start setting up 60 minutes ahead if possible with the IT support to set up the spaces before the meeting starts.	<input type="checkbox"/>	
3.	Set up the physical room – arrange the tables and chairs, microphone / speaker and cameras for the in-person participants - don't forget social distancing guidelines as required.	<input type="checkbox"/>	
4.	Connect the key laptop to internet via an ethernet if possible to ensure stable connection.	<input type="checkbox"/>	
5.	Test that the technology is working by logging onto the virtual meeting space – testing the mics, cameras, screens, and interactive board(s) (if using)	<input type="checkbox"/>	
6.	Producer and Host / Facilitator log on early - one as Host, one as co-Host. Test that the settings on the video conferencing are appropriate eg, availability of chat.	<input type="checkbox"/>	
7.	With the two roles (Producer / Facilitator) – have one remote and one in the room. If both are in the building, consider placing the Facilitator in a different room from others or online so that he or she can equalise the experience for the face-to-face and remote attendees - it's easier to enforce good virtual meeting habits if you're virtually present yourself. Alternatively, have the Facilitator where most participants are located.	<input type="checkbox"/>	
8.	Have all shared documentation for viewing during the meeting, ready and open to share.	<input type="checkbox"/>	
9.	Set up any tools that will be used eg, Mural, Google Docs – have links ready to share.	<input type="checkbox"/>	



PRIOR TO THE MEETING – ON THE DAY		DONE	NOTES
10.	Confirm the expectations for those with key roles – Host / Facilitator / Producer etc – walk through the agenda and confirm exactly who will do what to avoid any ambiguity.	<input type="checkbox"/>	
11.	Educate all participants in the rooms about switching their audio settings off if they are joining the meeting via their devices.	<input type="checkbox"/>	

DURING THE MEETING		DONE	NOTES
At Beginning of Meeting – Check-in Sequence			
1.	Start the meeting on time.	<input type="checkbox"/>	
2.	Your opening words (IEEI).	<input type="checkbox"/>	
3.	Inform - let the participants know the purpose of the meeting and the product to be produced.	<input type="checkbox"/>	
4.	Excite - explain the benefits of the meeting and why this meeting should be important to them.	<input type="checkbox"/>	
5.	Empower - describe the role they will play or the authority that has been given to them.	<input type="checkbox"/>	
6.	Involve - get them involved immediately through an engagement question that furthers the meeting purpose.	<input type="checkbox"/>	
7.	Confirm the agenda.	<input type="checkbox"/>	
8.	Review the ground rules eg camera on / off	<input type="checkbox"/>	



DURING THE MEETING		DONE	NOTES
At Beginning of Meeting – Check-in Sequence			
9.	Do introductions – ask everyone to speak in turn at beginning so everyone knows and can hear who everyone is.	<input type="checkbox"/>	
10.	Check that everyone can see and hear everyone else clearly? The easiest way of doing this is for everyone to say hi at the beginning, both physically waving and audibly being heard.	<input type="checkbox"/>	
11.	Describe the different meeting roles, eg let everyone know who the ‘Producer’ is and that they are available for techie help.	<input type="checkbox"/>	
12.	If a shared whiteboard or shared screen is available, draw a simple table and write each person’s name at a place around it to make it clear ‘who is in the room’.	<input type="checkbox"/>	
13.	Allocate in-room buddies for those who are remote. A buddy is someone who can be their physical presence in the meeting room as required, whether via text, chat, or phone, they have a private line of communication constantly available throughout the meeting.	<input type="checkbox"/>	
14.	Start to record the meeting so that those who cannot attend do not have to miss the meeting.	<input type="checkbox"/>	

FACILITATING THE MEETING		DONE	NOTES
1.	Ask people to identify themselves before they speak every time (unless the group knows one another’s voices very well).	<input type="checkbox"/>	
2.	Give priority to the remote person / people.	<input type="checkbox"/>	
3.	Keep a list of attendees and make tick marks by their names when they participate.	<input type="checkbox"/>	
4.	Call on people who have not spoken up very much.	<input type="checkbox"/>	



FACILITATING THE MEETING		DONE	NOTES
5.	Call on the remote person first in any go-around the room.	<input type="checkbox"/>	
6.	Check in with those remote for each item.	<input type="checkbox"/>	
7.	Ask for the participation you want to see.	<input type="checkbox"/>	
8.	In situations where the meeting is attended by clusters of people at different locations, try to assign one person at each location to be their advocate. Ask this person to help maintain balanced communications at their location.	<input type="checkbox"/>	
9.	If the meeting design calls for putting people into breakout groups, integrate remote participants across several breakout groups to accentuate their equal status.	<input type="checkbox"/>	
10.	Take time to describe what's going on in the room, especially during moments when there is quiet.	<input type="checkbox"/>	
11.	Always have a lower-tech backup plan - usually the phone. Secure a teleconference line as a Plan B and include this phone number when you send out the instructions. Then if the web conference is not working well, simply say, 'Let's get on the phone and finish this up'.	<input type="checkbox"/>	

AT THE END OF THE MEETING		DONE	NOTES
1.	Understand how people found the session- end the meeting with www.ebi (what worked well, even better if)	<input type="checkbox"/>	
2.		<input type="checkbox"/>	
3.		<input type="checkbox"/>	



b) Suggested Template to Issue to Participants prior to the Meeting

It is helpful for participants to know what to expect, especially as this may be the first time that an individual has attended a blended meeting or used the video conference platform or tools. We suggest adapting the following template – all highlighted text is for tailoring.

Template

We are looking forward hosting you on [INSERT DATE] at [INSERT TIME] for [INSERT MEETING TITLE]. Our goal for the time we have together is to [INSERT GOAL]. This will be a blended meeting which means that some participants will attend in person and others will attend online.

Details:

Date:	[INSERT DATE]	Time:	[INSERT TIME]
Link for those online:	[INSERT LINK]	Location for those in person:	[INSERT LOCATION]

The agenda and the documents you will need to access during the meeting are [ATTACHED IN THIS FOLDER / BEING SENT].

In-person participants:

- Please arrive a few minutes early so that we can start on-time. [PLEASE ALSO FOLLOW THE FOLLOWING SAFETY PROTOCOLS – LISTED HERE].
- [OPTIONAL – DEPENDING ON THE SESSION PLAN]. Please also bring a charged device with you eg, smart phone, laptop, or iPad to access online documentation / tools.
- If you are bringing a device and plan to log onto the meeting which in the room, please familiarise yourself with how to join the meeting without audio [INSERT INSTRUCTIONS].

Online participants:

- Please join a few minutes early to ensure that you can see and hear.
- The attached document gives some hints and tips on how to optimise your remote workspace.
- During the meeting we will be using the following collaborative tools [LIST TOOLS HERE EG, ZOOM, MURAL].
- [NAME OF TOOL] is [DESCRIPTION].

We would appreciate it if you could review the suggested guidelines below for using this / these tool[s]. You will get the most of out the meeting if you take the time to do at least one of the following:

- Read guidance [EITHER WRITTEN OR TOOL WEBSITE].
- Watch [FIND A SHORT VIDEO WITH KEY FUNCTIONALITY REQUIRED].



- Visit [\[INSERT LINK\]](#) and try it out [\[CREATE A PRACTICE AREA FOR PEOPLE TO TRY OUT THE TOOL\]](#).

We also will offer some orientation sessions [\[DETAILS HERE – TIME / DATE / LINK\]](#) **OR** we will be in touch separately to arrange a 10-minute preparation call where we will answer any questions you have.

If you have any special requests eg, accessibility requirements [online or in-person] please let [\[NAME OF PERSON\]](#) know in advance by [\[INSERT DATE\]](#) so that we can accommodate your needs.

If you have any questions about this or other matters relating to the meeting, please do not hesitate to get in touch,

Kind regards

[\[INSERT NAME\]](#)

Signature



c) Remote Set Up – for sending to online participants

Top tips for setting up at home as a participant in a blended or remote meeting

1. Have a great Internet connection – a poor connection adds stress for you and can also be disruptive for meetings - pay for the best bandwidth that you can.



Turn your camera on - most people turn their webcams off so that they can multi-task during meetings without distracting anyone. Turning on the webcam is the easiest way to minimise misunderstandings, increase engagement and promote team building – all at the same time. These charts give a sense of why turning your camera on is so important.

2. Put the camera at eye level - it's difficult to have a conversation when looking up someone's nose. Make sure the camera is positioned so other members can see your whole face as this helps us make eye contact with others on the video call and stay fully engaged.
3. Use the best equipment you can access -the first item you probably want to purchase is great headphones with a built-in microphone - this makes it easier for you to hear and be heard.
4. Test everything beforehand - arrive a few minutes before the meeting starts to test your equipment. Video conferences are notorious for tech problems - don't let it happen to you.
5. Minimise the background noise - go to a separate room, use a noise-cancelling headset or apps. Be mindful of strumming the keyboard, tapping and fidgeting as this can be a lot louder when it's amplified by a microphone and makes it difficult to hear.
6. Pay attention to what is behind you - a busy background of clutter or people walking back and forth can be distracting for others on the call.
7. Consider trying Zoom virtual background - Teams and other meeting technologies also have similar.



8. Great Lighting helps us see each other better and thus stay more engaged – it's science!
9. Only one person per computer - it can be difficult for more than one person to fit into the screen. We also rely on non-verbal cues when we're communicating with others, so if it's overcrowded we can easily miss out on part of the conversation.
10. Consider what you are wearing - patterns like stripes or checks can have a strange effect on video online but solid colours are usually safe.
11. Turn your notifications off - all those pings and dings when people come on and offline, or post what they're eating on Facebook can be distracting for others on the call.
12. Mute yourself when you are not talking - this helps reduce noise and allows the speaker to be heard by everyone, clearly.
13. Get yourself in the picture - If you're going to be presenting information to a group, consider using mmhmm or ChromaCam to project yourself onto your slides. This will make your presentation more personal and engaging.
14. Consider splitting your screen so you see those in the room and the documents at once.



Click on the computer icon for instructions for Windows on how to



do this and click on the



Apple icon for instructions for Mac.