

How to host inclusive hybrid meetings with in-person and virtual participants - Checklist

As we adapt to facilitating a combination of in-person and virtual working environments, it's important to make considerations for each style of work to ensure we are also creating an inclusive, collaborative, and productive work environment.

This document is a collaboration between [UW-Madison Learning & Talent Development](#), [The Office of Compliance](#), and the [Center for User Experience](#).

[Have a suggestion to improve this guidance? Submit feedback.](#)

Pre-Meeting Best Practices

- Determine if the meeting is necessary. Can it be handled in an email or chat instead?
- What is the purpose of the meeting? There must be a clear outcome of having a meeting.
- If you plan on using visuals, whiteboards, or other meeting aides, how will you adapt for any participants who have barriers with the software, audio, or other visuals?
- Are interpreter(s), captioning, or other accommodations needed? If so, have they been arranged in advance?
- Is there backup technology present, such as a VOIP phone conference line, phone conference system with room microphones, or a cell phone as a remaining backup?
- Who will fill the necessary roles in the meeting? Provide the opportunity to change who fills these roles.
 - Facilitator - Leads the meeting and follows the agenda.
 - Notetaker - Captures the key takeaways, decisions, or action items, and who is responsible for completing them.
 - Virtual participant facilitator (an advocate for virtual participants) - Monitors the virtual space for raised hands or questions, including chat comments
 - Technical help support - A contact person to help with technical issues.
- Are there fully ADA compliant accessible facilities including building, room entry, and restrooms?

Meeting invitations

- Is the meeting invitation sent out at least a week prior to the meeting?
- Did you include an agenda and all meeting materials in the calendar invitation? Share or email any documents or references to be used ahead of the meeting, so participants can follow along.
- Is there information about, and a contact person for disability-related accommodation requests?

- Is there a statement on who to contact if participants have technical questions or issues when connecting to the online meeting?
- Are there clear instructions and multiple options to join the meeting?
- Need to cancel? Be sure to give ample notification -- at least 48 hours.

Agenda

Is your meeting structured in a way that encourages inclusive participation? The meeting should have a clear agenda, structured around who is speaking, on what topic, and for how long. This agenda should be sent to all participants in advance.

- Design your agenda in a way that engages participants in multiple ways. You may want to use a combination of thought-provoking questions, virtual whiteboard exercises, mapping, polling, or visualization to keep people's interest and attention.
- Consider using digital collaboration tools, such as Box, Google Drive, screen annotations, virtual whiteboards, or the chat function within the virtual platform.
- Are the agenda and meeting materials in accessible formats? Use at least 14pt font and review the material for [plain language](#).

Setting expectations

- Have you set ground rules, meeting etiquette, or other community agreements?
- Establish a rule that everyone who wants to speak will raise their hand first. This will help both in-person and virtual participants avoid speaking over one another.
- Are online chat conversations appropriate during the meeting or should chat only be used for questions?
- Agree upon how to stop a conversation to allow for questions or comments.
- Make sure that the person speaking says their name before they start speaking. This helps everyone follow along, regardless of their location.
- Record the meeting, if possible, with available technology. Notify participants ahead of time if the meeting will be recorded. Be sensitive to concerns regarding confidentiality.
- Have a conversation about when to use audio, video and chat. Examples:
 - Turn video on when you are talking or responding to questions.
 - Use chat to otherwise engage in the meeting.
- Do not interrupt or talk over others.
- Give your full attention to the speaker and avoid distractions like email, web surfing, or texting.
- Silence your cell phone.
- Don't forget to pause so notetakers, interpreters, and captioning can keep up. It also allows people the opportunity to ask clarifying questions.
- Use plain language. Be sure to explain any acronyms or jargon that is used.

Physical and virtual room set up

How accessible are the physical and online meeting rooms? If a hybrid meeting is needed, ensure that the room where in-person participants will be located has appropriate audio and video equipment, as well as a strong internet connection.

Physical room setup

- Is there technology that provides equity in status to virtual participants, such as a TV monitor to display the virtual participants, an external/Bluetooth speaker to allow their voice to be heard, or a room microphone to pick up conversation happening too far from a laptop microphone to pick up?
- If there are multiple people in-person together, be aware of audio feedback and echoes. It is essential that, unless a room is specifically set up for audio conferencing, that only one person unmutes at a time.
- If possible, use headphones to ensure a better audio experience for all participants.

Virtual rooms

- Has everyone logged in early to take care of any technical issues?
- Avoid having remote participants look at information written on the whiteboard in the physical meeting space via video.
- Are virtual participants able to mute/unmute themselves?
- Do virtual participants have the necessary technology to follow the [University Remote Work Policy](#) on designated remote work spaces? If an additional accommodation is needed, has the [Divisional Disability Representative](#) been informed?

In-Meeting Best Practices

Stick to the agenda during the meeting and have someone take notes that can be referred to afterward.

When starting a meeting

- State the purpose and goals of the meeting.
- Stick to the agenda.
- Identify who will be the facilitator.
- Identify who will be the virtual participant facilitator.
- Identify who will take notes.
- Turn captions on for the chosen meeting software.
- If you are recording the meeting, start recording the meeting, and make sure participants are aware the recording is beginning. Be sensitive to concerns regarding confidentiality.

- Read out loud anything that is shared on screen, in the chat or when referencing written materials. Remember that not everyone may have access to all modes of communication offered.
- Re-introduce the ground rules, and set expectations.
- Consider acknowledging the land that the University occupies.
 - Suggested wording: The University of Wisconsin–Madison occupies ancestral Ho-Chunk land, a place their nation has called Teejop (day-JOPE) since time immemorial. In an 1832 treaty, the Ho-Chunk were forced to cede this territory.

Decades of ethnic cleansing followed when both the federal and state government repeatedly, but unsuccessfully, sought to forcibly remove the Ho-Chunk from Wisconsin. This history of colonization informs our shared future of collaboration and innovation.

Today, UW–Madison respects the inherent sovereignty of the Ho-Chunk Nation, along with the eleven other First Nations of Wisconsin.

We acknowledge the land we are on — not as a solution — but rather as a first step that calls on each of us to deeply consider our shared past and present with Indigenous peoples in this place, Teejop, and to make our own personal and institutional commitments to achieve a shared future.

- Acknowledge the in-person and virtual participants. Remind people there are multiple ways to participate.
- Have participants introduce themselves.
- Invite participants to share their pronouns.
- Aim for 30-60 minute meetings.

During a meeting

- Focus on 1-2 topics. If you need to cover more, give participants a break in between topics.
- Don't just screen share. Provide participants the documents that are being shared ahead of time. Screen sharing reduces the size of documents when viewed through video conferencing software, so the person sharing a screen may need to zoom in.
- When asking for feedback or questions, start with the remote participants first.
- Let participants know in advance that they'll be called on by name to provide feedback and that a response of "nothing to add" is appropriate. This should be used as an opportunity for collaboration, not to put coworkers on the spot.
- When presenting, avoid general statements such as, "Does anyone online have anything to say?". This usually results in silence and makes virtual participants seem like outsiders.
- Be vigilant of any stereotypes, microaggressions or harm in the meeting. Interrupt immediately and facilitate education and repair.

- Pause to allow people to process and ask questions. Some silence is OK as it gives participants an opportunity to think, and allows folks to turn off their mute button.
- Offer an opportunity to address non-agenda items at another time.
- Politely remind people of ground rules when they interrupt others.
- Repeat back or paraphrase what participants say. Listen and check for accuracy.
- Leave space to invite individuals who have not contributed to speak.
- If the conversation seems one-sided the facilitator may want to ask: "Have we considered other perspectives?" This can leverage the diversity in the room to get you higher-quality decisions.
- Provide the opportunity to follow up on agenda items after the meeting, to allow for participants to process the information.
- In making decisions, ask everyone to verbally say yes, instead of assuming silence equals agreement.