

Suggested Best Practices for OLA Blended (Virtual & Physical) Meetings

Best Practices for the Board Meeting Host Site

1. Physical board meeting space is equipped with a 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. Test the virtual meeting set-up prior to the day of the meeting
3. 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.
4. 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, practice using GoToMeeting with any board members who are unfamiliar with the technology.
2. Schedule the GoToMeeting meeting and share the link with the OLA Board President (see Instructions for Scheduling a GoToMeeting Virtual Meeting documentation).
3. 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>). Also include your contact information so virtual participants have a back-up plan if they can't get connected.
4. Arrive 30-45 minutes early to the physical meeting to set up the audio and visual equipment (or designate a replacement).
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. Consider having more than one camera on site so meeting has more thorough visual coverage for online participants
9. 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.
10. Display other meeting documents on the screen at the appropriate points in the meeting.
11. Outside of the meeting times, maintain the GoToMeeting documentation and the Blended Meeting Best Practices documentation.

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. Share the Google doc link with all participants.
2. Share the link for GoToMeeting in the board meeting logistics email.

3. Before the meeting, ask for RSVPs and for participants to specify if they will be attending virtually or in-person. Share this information with the ALA Rep/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 and keep it on, even when you are not speaking (this enables other virtual and physical participants to see that you are engaged and 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.

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](#)

For Discussion

Which of these items are reasonable?

How can we create a consistent culture of best practices for blended board meetings?

Do we need additional resources to move ourselves toward a goal of more effective blended board meetings? If so, what would these resources be?