Loughborough University

Meeting guidance

Contents:

Introduction

As an organisation, we spend a lot of time in meetings. So we should make sure that time is well spent and that our meetings are conducted in ways that allow diverse voices to input into and inform our decisions.

The ways in which we choose to conduct our meetings can and should be more varied in response to new technologies and different patterns of working. However, the need to run effective and inclusive meetings remains a constant. This guidance has been developed to support colleagues across the University to lead, organise and participate in effective and inclusive meetings. It provides information on how to choose the most effective meeting format and offers advice and top tips for chairs, meeting organisers and attendees.

The guidance has been developed in collaboration with colleagues from across the University, taking into consideration a diverse range of viewpoints, as well as a review of the literature and best practice across multiple sectors. We would like to take the opportunity to thank colleagues who have contributed to the development process and we will continue to review the guidance on an ongoing basis as we move to a more dynamic way of working.

What research has informed the guidance?

Our research has been conducted by a small, internal project team with input from colleagues across the University through surveys, focus groups and interviews. A review of the academic literature and best practice from across multiple sectors has also helped to inform the guidance and is referenced throughout.

Survey, padlet and Microsoft forms

We had 377 survey responses, over 700 padlet votes and 300 Microsoft Forms responses gathering staff views on online, in-person and hybrid style meetings. Data was analysed and informed our principles and guidance.

Focus groups

116 staff took part including grades 1-5, staff inclusivity network, REACH network, School support staff and technicians. An equality impact assessment (EIA) was also completed to identify any over or under-representation.

Workshops

We ran several workshops with key members of staff across the organisation. They reviewed and discussed the information gathered which helped inform the principles and guidance.

Review of literature

This included a review of academic journals, news articles and reports to support the development of the principles and guidance.

Interviews

We interviewed a total of 19 managers across both Professional Services and Schools. These staff members have managed teams throughout the pandemic and fed their views on Dynamic Working through to us.

Survey feedback

Percentage of respondents who selected 'agree' or 'strongly agree' to the following statements:

377

Survey Responses

July 2021

Legend: ■ Online ■ In-person ■ Hybrid

Format is inclusive

70%
48%
44%

Online meetings

"It levels the playing field"

"Much easier to access and participate in."

Supports decision making

62%
48%
34%

Online meetings

"Allows more people to contribute to discussion/decision making"

"Having the chat box enables comments to be made and logged which is very useful"

Supports dynamic working

94%
9%
71%

Online meetings

"Provides more flexibility"

"Allows staff to participate in training and staff networking that they may not otherwise have been able to do"

Supports colleague interaction

58%
85%
46%

In-person

"There are real benefits... such as the ability to share, collaborate and have corridor conversations"

"A lot of team building and rapport takes place in-person"

Positive impact on mental and physical health

44%
48%
32%

Online and In-person

"Bring some familiarity which has a positive influence on wellbeing"

"Walking time provides exercise, thinking time and a natural break"

Supports diverse membership

74%
33%
58%

Online meetings

"Have allowed for a wider possible audience"

"Can include people from remote places"

Guiding principles for effective meetings

These principles apply to Formal Committees, Project Management Boards and Working Groups at University-level and School/Service level. They also apply to internal staff meetings of three or more people.

The meeting format should be based upon which option offers the best chance to achieve the meeting's goals.

Organisers should consider the circumstances of attendees and choose a format that supports effective engagement.

Hybrid meetings should be used sparingly as they require technical support and equipment.

Where hybrid meetings are held, efforts should be made to create an equitable experience for all.

Both online and in-person meetings are encouraged and are considered to be effective, equitable and inclusive meeting formats.

Online meetings can be accessed by attendees that are both on and off campus.

The effectiveness and format of meetings should be regularly reviewed.

Definitions

Online: meetings where all participants join individually using Microsoft Teams, regardless of their location.
Hybrid: meetings where some participants are physically present in the same room, while others join online.
In-person: meetings where all participants are physically present in the same room.

Creating inclusive meetings

Meetings are more effective when all members feel valued and included. Below are some tips to help ensure that the meetings you lead are as inclusive as possible.

Plan for and seek diverse input

Review attendees: are you missing people with diverse or differing points of view?

Develop an agenda in collaboration with others: start as you mean to go on.

Mediate and facilitate: keep track of who is talking and who is not. Invite colleagues to contribute.

Encourage and seek feedback: How did the meeting go? Did attendees feel able to contribute?

Celebrate differences

Bring your 'whole self' to the meeting and encourage others to do the same.

Value all opinions and take on challenge in a constructive way.

Be mindful of how hierarchy and power can influence attendees.

Create a welcoming atmosphere

Greet attendees and create a welcoming environment. Take the time to pronounce people's names properly. If unsure ask, apologise if you get it wrong.

Let people speak and proactively seek and validate input from those who are contributing less frequently.

Maintain eye contact and do not allow side conversations to occur unchecked.

Consider access for people with disabilities

Ask attendees if they have any special requirements that you need to address so that the meeting will work effectively for them.

For online meetings, consider the tools that are available and how to utilise them to best effect (e.g. chat function, auto captioning, raising a hand).

Speak clearly and annunciate when contributing.

Establish meeting expectations

State ground rules up front and make sure they explicitly foster inclusion (e.g. no interruptions)

Agree a system to give everyone a voice. Arrange 'hands up' signals to agree who speaks next and use chat functions to allow everyone to contribute.

Choosing the most appropriate format to meet

Getting the meeting format right can be important. To help, we devised a grid based on staff feedback and literature review. This tool can be used to help you make a deliberate decision on your meeting format.

Why are you meeting? Consider the objectives of the meeting and the outcomes	What features do you need for the meeting to be effective?	Suggested meeting type	Number of attendees	Duration of meeting	Location of attendees
Exchanging information	Use shared screens and/or workspaces	Online	Larger number of attendees	Less than 1 hour	Multiple locations
Making decisions	Digital technology and tools to support the meeting				
Building relationships	Hear attendees voices (speech and tone of voice)				
Communicating feelings or resolving conflict	See facial expressions				
	Split attendees into groups to discuss tasks/actions				
	See attendees' expressions and body language				
	Observe what attendees are looking at	In-person	Smaller number of attendees	More than 1.5 hours	Common location

Extra considerations

The three stand alone considerations to the right might change your final decision.

Associated costs (travel, hospitality, resources)

Personal needs and circumstances

The format that the attendee(s) would prefer

Organising and starting a meeting

When preparing for a meeting, it is essential to plan ahead. Below are some considerations to be aware of in advance of your respective meeting.

Online

- Circulate a draft agenda for comment or ask attendees for item suggestions.

- Circulate the agenda and any relevant papers. Consider how formal and fixed it needs to be for your meeting.

- Familiarise yourself with the software.

- Ensure that all attendees have been invited on Microsoft Teams and have the correct permissions (e.g. sharing rights).

- Familiarise yourself with the top tips for Chairs and discuss in advance how the etiquette will work in your meeting.

- Consider if you require a chat facilitator.

- Identify if break out rooms are needed.

85%

of staff surveyed said that in-person meetings support colleague interaction.

In-person

- Circulate a draft agenda for comment or ask attendees for item suggestions.

- Circulate the agenda and any relevant papers. Consider how formal and fixed it needs to be for your meeting.

- Ensure you send a meeting invitation so attendees have the date and time in their calendars.

- Have you given everyone sufficient notice? We recommend at least seven calendar days should be given to hold an in-person meeting, unless participants are already on campus.

- Familiarise yourself with the top tips for Chairs and discuss in advance how the etiquette will work in your meeting.

- Book a room with enough capacity and decide if attendees need laptops. Take into consideration attendees' locations on campus. Is social distancing still required?

70%

of staff surveyed said that online meetings are inclusive.

"Putting hands up in online meetings is a more effective way of contributing ideas, than in-person"

"[In-person meetings are] much more enjoyable than online. Usually more productive. Easier to get to the bottom of issues"

"Increasingly online meetings are scheduled back-to-back, so there is little downtime between them."

How to set up, chair and participate in effective and equitable meetings

Top tips for chairs

We recognise that chairing a meeting can often be challenging. Below are some tips to ensure your meeting is inclusive and operates effectively.

Online

- Establish etiquette guidelines. Agree if attendees should have their camera on/off. Agree a system to give everyone a voice, using the 'hands up' signal for who speaks next and use of the chat function.
- Welcome participants and consider what introductions are needed.
- Monitor the chat if you haven't arranged a facilitator. Liaise with them regularly if you have.
- Be inclusive and create a welcoming environment. Let people speak and proactively seek and validate input from those who are contributing less frequently. Maintain eye contact and do not allow side conversations to occur unchecked.
- Listen closely and read between the lines. Not being in the same room means you don't have extra information from body language or tone to get the sense of what people are thinking or feeling.
- Use names and give context. When responding to chat comments, repeat the relevant remarks and make clear who you're responding to.
- Keep slides simple. It's clearer to have more slides with fewer things on them.
- Provide a break if your meeting is more than 90 minutes.
- End with actions. Summarise the key action points and refer back to the agenda. Ensure everyone knows and agrees the actions to take forward.

In-person

- Establish etiquette guidelines at the start of your meeting. Agree how attendees will contribute. Meetings are more effective when everyone feels their voice is heard and their opinions are valued.
- Welcome participants to the meeting and consider what introductions are needed.
- Keep things moving. Ensure that every topic on your agenda is covered in the time allocated for the meeting. Prevent anyone from dominating or derailing discussions.
- Be inclusive and create a welcoming environment. Let people speak and proactively seek and validate input from those who are contributing less frequently. Maintain eye contact and do not allow side conversations to occur unchecked.
- Provide a break if your meeting is more than 90 minutes.
- End with actions. Summarise the key action points and refer back to the agenda. Ensure everyone knows and agrees the actions to take forward.

"In-person meetings bring some familiarity which has a positive influence on well-being"

"Having the chat box at the side enables comments to be made and logged"

"Being able to see people in the room and read body language and unspoken cues is really useful"

Top tips for attendees

When attending a meeting, whether it be online or in-person, it is important to be prepared and follow the guidelines outlined by the Chair. Below are some tips to ensure you get the most from your meetings.

Online

- Read the agenda and paper(s) in advance.

- Ensure you join the meeting on time.

- If your location is on campus, you are responsible for finding a suitable location to join the meeting.

- Have the documents you need readily accessible on your device.

- Follow the agreed meeting etiquette (use of camera, use of hands, use of chat).

- Be mindful of background noise and use headphones where appropriate. Consider finding a quiet space if you anticipate consistent contribution.

- Try and stick to the agenda items when discussing and keep points concise.

In-person

- Read the agenda and paper(s) in advance and consider if you need to bring a laptop.

- Give yourself enough time to get to the meeting room.

- Follow the agreed meeting etiquette outlined by the Chair.

- Try and stick to the agenda items when discussing and keep points concise.

- Actively engage as much as possible. However, be conscious that your contributions aren't dominating the meeting.

"Specialist headsets [are needed] because 'normal' microphones pick up too much background noise"

"The ability to record meetings and/or have transcripts saves time in capturing key points"

"In-person meetings are often dominated by strong personalities"

"It is easier [in-person] to read non-verbal cues and gauge reaction to your input"

When to hold a hybrid meeting

We understand that it is not always possible to meet in a room together or online and hybrid meetings can be a solution when correctly executed.

A hybrid meeting can be effective if you can ensure the following:

- Attendees can visibly see all participants.
- Attendees can hear comments from all participants.
- Attendees not in the room feel included.
- Establish a structured method for attendees to contribute to discussions.
- Review what did and didn't work at the end of each meeting.

Risks of holding a hybrid meeting:

- Inclusivity: danger of creating a "2 tier system".
- Poorer audio.
- Visual challenges for those online.
- Effectiveness.
- Time and possible cost.
- Simultaneous in-person contributions won't always get picked up by online attendees.

"Most meeting spaces are not geared up for online colleagues to hear everyone in the room"

"Hybrid meetings should be 'the best of both worlds', and they are if the technology works, the space works and the meeting is managed well"

"It is more difficult to contribute if you are online as opposed to sitting in the room"

How you may choose to hold hybrid meetings

A number of options are available to colleagues looking to hold hybrid meetings.

1

Through any of our Microsoft Teams enabled rooms

- Please find the list of hybrid meeting supported rooms here.

2

General meeting rooms

- Ideal for smaller in-person numbers (2-3).
- Attendees should join from individual devices.
- Attendees should mute their microphones and speakers apart from on ONE device.

3

Arrange teaching support

- Teaching support is primarily used to support teaching and their time is limited. As a result, please ONLY use teaching support for formal University committee meetings where appropriate to do so.

Etiquette for holding Microsoft Teams calls in an open plan office

As we start to transition back in to the office more regularly, it is important to consider others, especially in shared spaces.

Wear headphones

Access Teams meetings through noise cancelling headphones.

If this is not possible, consider booking a meeting space for your call.

Be mindful

Consider who is in the office.

Be attentive to their needs and wishes.
You could ask them if they mind you taking a call.

Think about how loudly you are speaking.

Choose an environment that supports you

If you envisage contributing to the meeting consistently, consider finding a room or quiet area to attend your meeting from.

References and acknowledgements

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Acknowledgements