

Ways to Ensure Off-Site Participation During In-Person Meetings

by Jeanette Romkema

Increasingly many Boards, committee, working groups, and organizations need to meet in a way that is *mixed* or *hybrid*. Often, we have a meeting and want or need to bring in participants from other branch offices, cities or countries. When we do this the people in the room hosting the call have an “advantage” and those not lucky enough, may feel disadvantaged, lacking, or even invisible.



Here are some ideas for maximizing everyone feeling seen, heard and of value.

1. **Confirm that all off-site participants have the documents needed.** Especially when these individuals cannot see the visuals being presented or referenced in the room, sending all the visuals and documents in advance is critical. Off-site participants need all the documents that everyone else received in advance of the meetings, as well as those used during the meeting to present content.
2. **Name each document as they are titled before using them.** Off-site participants don't have as many cues as others in the room, and document titles will help ensure speedy and easy engagement for all.
3. **Check equipment in advance.** There is nothing worse than failing technology for those who are joining from a distance. For those meeting in-person it can also be frustrating. Check your technology well in advance and with those using it i.e. ask off-site participants to join the meeting at least 15 minutes early. It can also be helpful to check the quality of sound and visuals from time-to-time during long meetings.
4. **Find a way for off-site participants to be engaged with others and with the content.** From time-to-time, small group dialogue or work can be especially helpful in a meeting to achieve the pre-set objectives/achievements. If there are individuals participating from a distance, they also want and need to be included in this. Some ways to do this are: move to smaller Skype conversations or another chat room for a period of time. Solo work with a plan to share back with the group can also be helpful, especially for introverts.

5. **Call off-site people by name throughout the meeting.** It is always easier for people to participate when they are in a room together. When the technology is challenged or there is power imbalance (age, seniority, cultural, gender, language or other), participants joining virtually can find it even more challenging to participate. Calling people by name to participate will ensure they have a voice, are heard and feel valued.
6. **Involve off-site participants in one aspect of the meeting in a unique way.** This will help these participants to feel valued and respected for what they bring to the meeting. It may be helpful to let these individuals know in advance if the contribution you are hoping for is substantial. However, if it is small it should be fine to call them by name when the time is right. Be authentic and make it meaningful for all.
7. **Start with a *check-in*.** This will reduce the distance that is felt when participants are not in the same room and can build a feeling of connectedness despite distance. This is especially helpful when there are many people in one room and just a few participants elsewhere. Solo participants can feel especially isolated. A check-in should vary from meeting-to-meeting and be in response to what you know about these individuals, their situation, or the purpose of the meeting. It does not have to be long but it should be authentic. Here are a few examples:
 - a. *“In a few minutes we are going to be entering our annual budget meeting. This is an important meeting and can sometimes be challenging and long. Before we start, let’s share one lesson you have learned in your own personal finances that may also service us well here today?”*
 - b. *“We haven’t see each other for a few months now, and I’m sure much has happened over the past weeks. Before we start let’s share something we are feeling especially challenged by and one thing we are especially grateful for since we were last together.”*
8. **Save time to *check-out*.** It is sometimes helpful to check the pulse of participants at the end of a meeting. Especially if there was tough conversation or participants entered with resistance or if the content was challenging, taking five minutes at the end to share some final thoughts can offer closure or helpful information for future planning. Here are a few examples:
 - a. *“Thank you so much for your openness to consider this new way of working and planning – I know it felt different and maybe sometimes challenging. What one word comes to mind for you at this time after trying this process out?”*
 - b. *“That concludes our meeting on our budget and financial goals for the year. Thank you for your input, focus, questions, and ideas – this has been so valuable. To end our time together, I would like to invite you to consider one thing you are especially grateful for in this meeting today and one thing that surprised you. Turn to someone close to you and share these two things.”*

How do you ensure all members in *mixed meetings* feel included and valued?

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