



## **Guidelines and best practices for choosing meeting Modality**

May 11th, 2022- Approved by the University Senate

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The University Senate seeks to provide the University community with best practices for determining when meetings should be in a specific modality, such as virtual, in-person, or mixed/hybrid. Best practices should include criteria for selecting the best tool for the meeting's goals and objectives.

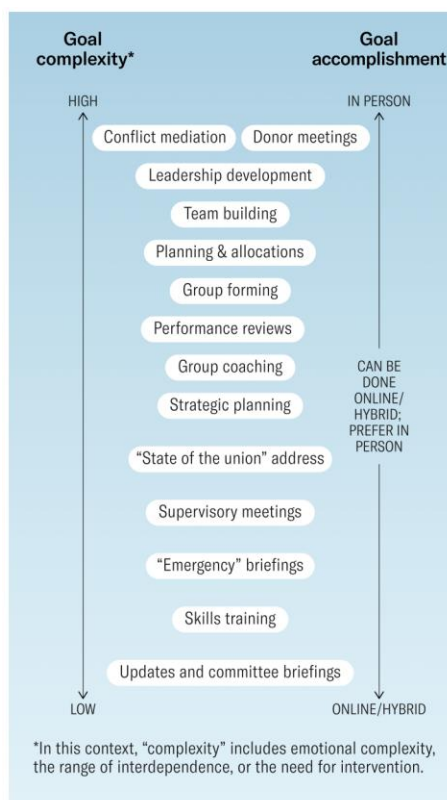
Specifically,

1. All meetings should be virtual by default or offer a virtual option.
2. In-person meetings should be restricted to situations that have:
  - a. A high level of interpersonal interaction.
    - i. A small number of participants.
    - ii. Activities such as fund raising, networking, or conflict mediation.
  - b. High emotional impact, either positive or negative
  - c. Agreement to meet in person by all participants
  - d. Accessibility for all participants

In order to determine the modality for a meeting, a group planning a meeting can use the questions posed in [When Do We Actually Need to Meet in Person?](#) (Harvard Business Review, 2021):

1. Are meeting goals relationship-based or task-oriented?
  - a. Task-oriented goals
    - i. These type goals can often be accomplished in a virtual meeting (if a meeting is indeed deemed necessary). This can include,
      1. Updating a group
      2. Briefing constituents
      3. Goal setting
      4. Planning events, or action plans
  - b. Relationship-based goals
    - i. These goals involve strengthening or repairing connections among team members and are usually accomplished most effectively in person.
    - ii. Difficult feedback should be given face-to-face
    - iii. Challenging group conversations should also take place in person.
  - c. See diagram below for additional context
2. How complex are the meeting's objectives?

- a. Sometimes complexity is a more helpful framework for determining what form a meeting should take. This includes
    - i. emotional complexity
    - ii. the level of interdependence that certain decisions or outcomes may require.
  - b. Most collaboration between team members can be accomplished utilizing virtual tools and work spaces.
3. What type of meeting will be most inclusive?
- a. One can consider which modality will generate the highest participation for all members.
  - b. One should consider accessibility for members that may have disabilities.
  - c. One can consider the physical location of members who will attend.
4. Does the group have the skills and tech set up for a hybrid gathering?
- a. Skilled hybrid facilitators know how to make Zoom participants feel like full participants.
  - b. Facilitators can establish clear protocols for all participants to offer input.



## Rationale

University community members have experienced confusion and uncertainty with when it is appropriate to meet in-person, or through an online platform, or using a mixed modality since the pandemic has receded to a more manageable level since mid-2021. The COVID-19

pandemic caused businesses to rethink how we work and gather. Virtual meetings and group work have become an effective and efficient way for Montclair State to operate successfully. Now that the University has established a flexible workforce policy, employees' disparate schedules are most conducive to virtual meetings being the standard. Virtual meetings help maximize employees' productivity, and minimize the University's resources and temporal costs.

Further, as the University moves toward an expansion of satellite campuses, such as the University Center at Union County College, virtual meetings become all the more important to maintain connections and continue to operate uniformly. Virtual meetings allow employees to reduce their overall carbon footprint when they can stay in place and meet via virtual modality.

Broadly speaking, the literature demonstrates most meetings at Montclair State could be held online, or in a hybrid format, only excluding those involving high emotional complexity, such as conflict mediation, or where a personal investment will facilitate positive outcomes (see sources). In our own practice, the University Senate has found that for large format meetings, attendance is much higher when offered virtually.

Care and consideration should be taken when planning in-person meetings to assure that employees do not feel coerced into attending face to face meetings arranged by their supervisors. The best practice is to widely offer a virtual option, and establish high levels of inclusion to those who are attending via this format.

**Terms:**

1. Accessible/accessibility: ensuring that meeting space and materials are inclusive to all members in attendance.
2. In person: gathering using a physical space.
3. Virtual: gathering using a virtual space, such as Zoom, or other computer application.

**Sources:**

[When Do We Actually Need to Meet in Person?](#) Harvard Business Review, 2021.

Karl, K., Peluchette, J., & Aghakhani, N (2021). Virtual work meetings during the Covid-19 pandemic, *Small Group Research*, 1-23. <https://doi.org/10.1177/10464964211015286>

Standaert, W., Muyllé, S., & Basu, A. (2021). Business Meetings in a Post-Pandemic World: When and How to Meet Virtually?, *Business Horizons*, Feb, 2021. <https://doi.org/10.1016/j.bushor.2021.02.047>

University of Washington (Accessibility framework)

<https://www.washington.edu/compliance/ada/best-practices-for-access/virtual-meetings-trainings/>

University of Glasgow (wellbeing perspective)

<https://www.gla.ac.uk/researchinstitutes/healthwellbeing/guidelines/online meetings/>