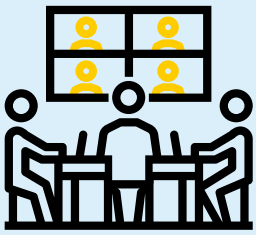
Hybrid Meeting & Return-to-Office Preparation Checklist

Preparing the Office

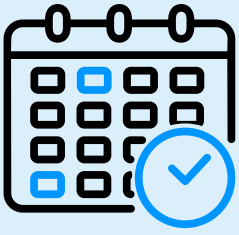
- [ ] Develop a plan for how many people are permitted in the office at once.
- [ ] Spell out safety protocols for sanitizing surfaces, wearing masks, maintaining distance, eating in common areas, etc.
- [ ] Agree on any screening procedures for people in the office: vaccination history, recent travel, temperature check, and so on.
- [ ] Assign someone to communicate the protocols with everyone else and update the team on changes to the policy.

First Hybrid Meeting



- [ ] Purchase any technology needed and test ALL in a practice meeting.
- [ ] Send attendees detailed instructions on how to access the meeting.
- [ ] Adjust agenda to minimize blocks of reporting.
- [ ] Limit meeting time to an hour, or provide adequate break time.
- [ ] Set expectations: cameras on, microphones muted unless talking, participation is anticipated, and added patience for everyone.

Between Meetings



- [ ] Consider sending attendees the same snack or mug or a dinner gift card prior to the next meeting to enhance a feeling of cohesiveness.
- [ ] Ask for regular feedback from attendees about what worked and didn't.
- [ ] Discuss a mentor or buddy program to pair board members to increase rapport.
- [ ] Provide social time, either 15 minutes before or after meetings or at other times.
- [ ] Address any lack of meeting engagement privately between meetings.

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