NATIONAL ASSOCIATION OF
**Community Health Centers**®

COVID-19 and Health Center Boards

FOCUS AREA: LOOKING BEYOND THE PANDEMIC

Hybrid Board Meetings: Our Next Normal?

BACKGROUND

Health center boards quickly adapted to virtual board meetings that resulted from social distancing requirements at the outset of the COVID-19 pandemic. Many boards have been able to adopt effective virtual meeting practices,[1] though such meetings have proved to be challenging at times, and many report missing the sense of connection that is present at in-person meetings. In addition, over the course of the pandemic, many have experienced various technical challenges and the often repeated reminders of, "You're on mute!"

As COVID-focused health indicators continue to improve in many communities and as many areas continue to loosen in-person meeting restrictions, some health center boards are making the shift to "hybrid board meetings" – providing some members with an opportunity to meet safely in person while allowing for other members to continue to participate virtually. The benefit of hybrid board meetings is that they create opportunities to engage board members who might be uncomfortable or unable to attend in-person board meetings due to health issues, concerns about unvaccinated children, scheduling, travel, or other commitments. Some boards plan to use the hybrid meeting model for the foreseeable future. Hybrid meetings can, however, have their own obstacles. For example, are the voices of those not in the room heard and valued as equally as those of board members who are meeting in person? Do members practice proper meeting etiquette?

FACE TO FACE MEETING — HYBRID MEETING — VIRTUAL MEETING
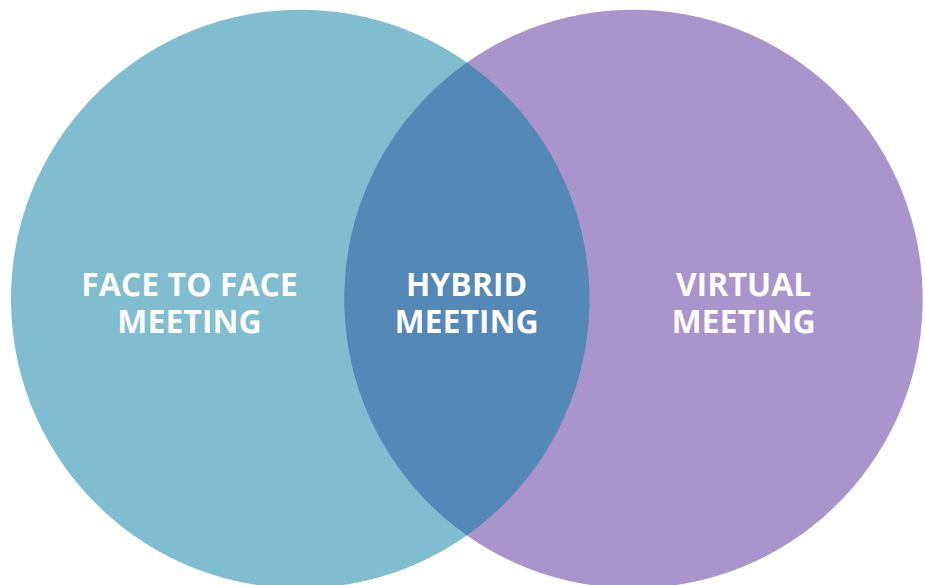
This resource will provide strategies for effectively managing a board meeting in which members are present in person, on screen, and over the phone.

Items to Consider

Suggested approaches for transitioning to hybrid meetings

There are a number of important factors to consider prior to implementing hybrid meetings to ensure a solid foundation of understanding, equitable experience, and comfort among board members.

As your board considers hybrid board meetings, it will be critical to acknowledge the range of opinions and levels of comfort that board

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1   NACHC has various articles on **virtual board meetings** and **virtual board retreats.**

members have around meeting in person. First, openly discuss options (e.g., staying virtual, moving to hybrid, etc.) and gauge board members' opinions (e.g, via poll, discussion at board meetings, individual discussions with the Chair or other officer, etc.). It is important to acknowledge that we are still in a state of uncertainty and to meet board members where they are. Some will want to hold off from meeting in person for a while, while others are ready to safely convene in person. Be sure to emphasize that board members will not be asked to meet in person against their wishes. Being upfront will help foster relationships and contribute to building trust within the boardroom.

There are practical considerations that need to be worked through as you consider transitioning to hybrid meetings, which will be different for in-person and virtual attendee environments. Areas to consider and questions to ask members are included below. Ultimately, there will need to be group agreement on protocols.

For in-person attendees, review CDC and local health guidance, and consider:

a) Is the meeting space large enough to accommodate any mandated social distancing?

b) Is there an expectation that board members and staff are vaccinated?

c) Will masks be required?

For virtual attendees:

a) Ensure board members have ongoing access to reliable webcam technology and IT assistance.

b) Strongly encourage participants to join board meetings using your preferred videoconference option (i.e., Zoom, Microsoft Teams, etc.) rather than by simply joining by phone (where Internet bandwidth permits). If possible, have a staff member work with board members to test the technology experience in advance of the first hybrid meeting.

c) Ensure that the webcam in the physical meeting space is positioned to allow virtual participants to see and hear all in-person participants. Be sure to test this in advance of the first hybrid meeting.

Strategies for facilitating effective hybrid meetings

Just as the quick transition to all-virtual meetings brought some challenges, getting used to hybrid meetings may also take time. There will be some initial challenges to work out, but there are some strategies that health centers can implement to help maximize engagement and effectiveness.

1. At the first hybrid board meeting, allow board members time to acknowledge their feelings. Some may want to celebrate the new meeting format. Others may want time to talk about possible discomfort; make everyone feel welcome and comfortable, no matter how they are attending.

2. Packets/presentations/materials should be provided well in advance of meetings. It is good practice to provide board packets one week in advance of board meetings and to set expectations that board members read

these materials prior to the meeting. Some boards use an online board portal that makes accessing meeting materials easy to do online regardless of how they participate in meetings. Regardless of the approach, ensure members attending virtually have had access to all materials and that these are collated in a manner that allows them to easily follow along during the meeting (i.e., clear pagination, packet materials following the same flow as the board agenda, etc). Discourage staff from making last minute changes to presentations that may make it difficult for those attending virtually to follow closely.

3. Ensure that the agenda is clear and concise, with expected actions and outcomes noted, and avoid scheduling board meetings for longer than two hours.

4. Social interaction had to adapt with virtual meetings and that took many boards time to figure out; in recent months, many have incorporated informal discussion time before meetings to help foster camaraderie. In moving to hybrid meetings, continue to create opportunities for pre-meeting social interaction and ensure that board members attending virtually have the opportunity to participate.

Consider opening the meeting space and virtual meeting platform at the same time approximately 15-20 minutes early to enable board members to interact with each other apart from the board agenda.

5. Consider whether there are technologies available to your health center that will help facilitate better interaction and engagement from all participants. Some boards have provided tablets to each board member, and each board member joins the virtual meeting platform whether the member is in the boardroom or joining remotely.

6. Facilitating hybrid board meetings will require strong and intentional leadership from the Board Chair. Factors to consider:
   a) Make sure each voice is heard. Regularly review the virtual meeting platform to look for electronic hands that have been raised and to call on participants who are not actively engaging. Engage fellow board members or staff members that support the board to help the Chair facilitate and monitor this activity, which can be tricky to do at the same time.
   b) Be intentional to ensure all voices are heard.
   c) Regularly summarize/reaffirm viewpoints throughout discussions to ensure clear and consistent understanding of key action points.
   d) For major decisions, in particular, complete a round robin when taking actions/ making decisions to ensure

all board members have had an opportunity to express comments and/or concerns and that there is alignment of all members.
   e) Follow up with board members after the meeting to ask about their experience and suggestions about ways to improve future hybrid board meetings.

7. Revisit meeting etiquette and consider including a hybrid meeting etiquette summary handout in board packets as a reminder to:
   a) Be on time and be prepared
   b) Be visible and use the webcam functionality whenever possible (online)
   c) Encourage members to introduce themselves so that everyone knows who is speaking
   d) Use mute function if not speaking (online/phone)
   e) Avoid "side discussions" (in person)
   f) Follow your agreed protocol for making a comment or asking a question -- e.g., raise your hand (in person) and use the comment thread or raise hand function (online)
   g) Remind members to be mindful of what they're doing and how that may affect the ability of others to hear the discussion (for example, constant keyboard typing and/or shuffling papers close to the microphone can be distracting to those online and on the phone)

Hybrid meetings will require intentionality and preparation. The strategies identified above will help this transitional period run a little more smoothly. It will be important to ensure regular feedback loops and be flexible and patient to meet the specific needs of your health center board.
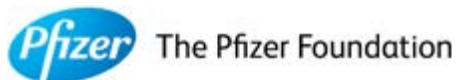
Discussion Questions

Discussion questions to consider include:

- What obstacles will we face as a health center in implementing hybrid board meetings? What unique challenges should we consider?
- How can we best gauge whether members will return in person or continue to meet virtually or over the phone (e.g., poll, phone discussion with the Chair or other officer)?
- What steps need to be put in place to ensure effective board member engagement, regardless of the nature of their participation during this transition period?
- Is our technology sufficient to enable effective participation by those who are not on-site, or should we consider new technology?

Acknowledgements and Additional Information

For additional resources from NACHC related to COVID-19, please visit **https://www.healthcenterinfo. org/priority-topics/covid-19/** and **http://www.nachc.org/coronavirus/.** For additional governance resources, please visit **https://www. healthcenterinfo.org/quick-finds- governance/.**