# **Holding meetings and booking spaces**

# **Introduction**

This document sets out the University’s guidance for holding meetings and booking spaces. The following areas are covered in detail:

1. Meeting types
2. Safety guidelines
3. Principles and best practice on how to run meetings ensuring accessibility for all
4. Booking process
5. Rooms and equipment

# **Meeting types**

## **2.1 Virtual**

Virtual meetings are held online via Microsoft (MS) Teams or Zoom, or any other University approved and supported platform. User guides and advice can be found on The [Digital](https://universityofexeteruk.sharepoint.com/sites/TheDigitalHub) Hub.

Both MS Teams and Zoom can be set up to ensure only those logged in to their University account can enter a meeting; those that do not have a University account or are not logged in must be admitted through the virtual ‘lobby’. It is recommended that users log in to their University accounts before attending work meetings as this helps to ensure digital security.

Please be aware that all recordings and comments are subject to Freedom of Information (FOI) and Data Subject Requests which under legislation will be assessed by Information Governance as to the relevance of releasing data, this is dependent on the request and content and data that has been provided. Further information can be found in the [Information Governance Guidance](https://universityofexeteruk.sharepoint.com/sites/InformationGovernance/SitePages/Meeting-Recording-Guidance.aspx?OR=Teams-HL&CT=1651068750862&params=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjA0MDExMTQwOSJ9).

Any recordings of the meeting should be stored appropriately within the required applications for example Stream, Panopto, SharePoint and not held for longer than required by retention policy or beyond the process that was required for example: to type up the minutes of meeting.

### **2.1.1 MS Teams**

MS Teams has replaced Skype for Business as the University’s preferred virtual platform. All University of Exeter staff and students have access to MS Teams.

MS Teams meetings:

* Include audio, video, breakout rooms and screen sharing for up to 300 people. Please note that breakout rooms can only be set up by the meeting organiser.
* Can cater for large groups (up to 10,000). In such instances, MS Teams Live may be the preferred option.
* Enable interactive, collaborative meetings with people both internal and external to the University, with meeting notes and chat functions utilised before and during the meeting remaining available to attendees after a meeting has ended.
* MS Teams can detect what is said in a meeting and then present real-time captions to aid accessibility. Recordings of meetings/presentations can also be enabled with captions.

Detailed [user guides for MS Teams](https://universityofexeteruk.sharepoint.com/sites/TheDigitalHub/SitePages/User-guides-for-Microsoft-Teams.aspx) can be found on The Digital Hub.

### **2.1.2 Zoom**

Zoom is the alternative online meeting and conferencing tool that the University now supports, meaning that all staff and students can host Zoom meetings.

Zoom meetings:

* Allow up to 300 participants to share video and audio content.
* Include [breakout rooms](https://support.zoom.us/hc/en-us/articles/206476093-Getting-Started-with-Video-Breakout-Rooms), with the ability to make the same announcements to users in all breakout rooms. Meeting notes and chat auto-delete after a meeting has ended and must be saved if they are to be referred back to.
* Have now been updated (from a University of Exeter settings perspective) to allow people without an existing Zoom account to join meetings created by University users. **Please note that to maintain the highest level of security you must only admit the intended attendees of the meeting**. These changes have been made to ensure the user experience across Zoom and MS Teams is similar.
* Can be set up with registration questions that can be used to vet attendees prior to an event or meeting, so invitations will be sent only to those accepted at registration.
* Allow simultaneous interpretation e.g., translating into other languages

Detailed [user guides for Zoom](https://universityofexeteruk.sharepoint.com/sites/TheDigitalHub/SitePages/Guides-to-using-Zoom.aspx) can be found on The Digital Hub.

**MS Teams remains the primary communication tool at the University as it is secure and allows for smooth collaboration, including with external participants.**

## **2.2 In-person meetings**

Face-to-face meetings can take place. Rooms should be used that are appropriate for the size of the group. Before choosing a room, consider the requirements of all invitees to ensure the location is accessible and suitable for their needs.

It is recommended to book the room before sending invites to attendees. See section 6 for more details on room booking. Consider this when deciding on the format you will need for your meeting.

## **2.3 Hybrid meetings**

These meetings will be a mix of face-to-face and virtual via MS Teams or Zoom. The Room Bookings team can support you to book a room to utilise Microsoft MS Teams/Zoom Broadcast or Collaborative formats.

It is recommended to book the room before sending invites to attendees. See section 6 for more details on room bookings. Again, consider this when deciding on the format you will need for your meeting.

# **Safety guidelines**

## **3.1 Virtual**

Ensure all participants have a safe space away from common areas when discussing or sharing confidential information whether at home or on campus. Consider privacy and whether you can be overheard while on the call.

## **3.2 In-person**

Participants should not attend campus if feeling unwell. Face coverings continue to be recommended. Use the hand sanitiser stations on entry to and exit from rooms and follow any self-cleaning protocols.

On entry to the room the windows may require opening especially in naturally ventilated spaces so please observe and follow any window signage.

## Each participant should clean the seat and table they are going to use. To help avoid virus transmission avoid sharing objects where possible, for example, pens, documents, keyboards etc. If this is not possible, ensure a thorough wipe down with the cleaning materials provided within the room is undertaken before touching shared objects.

## **3.3 Hybrid**

When booking a meeting space be aware of how many participants are attending in person and virtually so the room booked has sufficient capacity. You will need to follow guidance for both Virtual and In-Person meetings. Ensure it also meets the technological requirements needed (see section 4 below).

## **3.4 Visitors on campus**

Any member of staff who is hosting a visitor on campus is responsible for ensuring the visitor understands and complies with the University’s practices and procedures throughout their visit. For further information refer to the [Visitors' Policy](http://www.exeter.ac.uk/media/universityofexeter/healthandsafety/Visitors_Policy_V1.2.pdf).

# **Technological guidelines**

## **Virtual**

Make sure that Teams/Zoom meeting settings have enabled closed captioning (CC). If you are running a large meeting, consider “mute all” as a default setting to avoid meeting disruption.

## **4.2 Hybrid**

Ensure that when setting up hybrid meetings that participants who are remote, can engage and interact in the meeting as easily as those face-to-face.

Choose a space or meeting room which has the capability to host a hybrid meeting suitable for the subject being discussed, options may include; Interactive whiteboards, large screens and directional microphones. Most meeting rooms on campus are set up with equipment to be able to have multiple participants face-to-face and remote participants visible via a large screen.

Shared office space may not be appropriate for the face-to-face participants in hybrid meetings due to possible disruption with open discussions. Individuals can participate from shared spaces if using headphones to minimise disruption.

# **Principles and best practice on how to run meetings ensuring accessibility for all**

## **5.1 All meeting formats**

Consider whether it is necessary for in-person attendance and whether the same result can be achieved by holding a remote meeting.

Before deciding which type of meeting is most appropriate for your group consider the needs of the group. Ask in advance if anyone has any requirements that need consideration, for example mobility, sight, hearing, and invisible disabilities that may affect interaction with technology.

There is training available that sets out best practice in managing effective meetings. <https://www.exeter.ac.uk/staff/development/coursesbycategory/personaleffectiveness/>

### **5.1.1 Before the meeting**

### **Define the objective**

Once it has been determined that a meeting is needed, determine its aim. Most meetings fall into one of four categories, each of which has a distinct objective:

* Decision making – The aim is to reach a conclusion that leads to action.
* Information sharing – The objective is to share information or spread awareness to a wider group.
* Problem solving – The goal is to share advice and build a plan based on that knowledge.
* Discussion – The purpose is to exchange perspectives on a topic.

### **Set an agenda**

An agenda will ensure that you cover the specific aspects required to meet your meeting objective and it will inform and set expectations of the attendees.

Your agenda might have only a few items or it may have many; the agenda length and content will help to inform the duration of the meeting. Try to reserve five minutes at the end to summarize the discussions and agree on any next steps.

### **Keep it short**

Meetings should be as long as necessary but as brief as possible.

### **Attendees**

Before sending out an invitation, take some time to consider who should attend the meeting. It is important to be inclusive, but sometimes having more people in the room makes meetings harder. Consider the type of meeting. Is it a team meeting or a meeting to discuss a specific objective? Think of the minimum number of people that you need to achieve that objective. Make sure that the people who are essential to your meeting are aware of their roles.

### **Sending out invitations**

If you are inviting a guest presenter/speaker for a section of the meeting only, make it clear how you will invite them into the meeting and when they will be expected to leave. For remote attendees, clarify whether they should join the meeting link or if you will call them in at the right time.

### **Circulating materials**

In addition to sending an invitation stating the objective and the agenda for the meeting, circulate relevant materials at least one day before. Receiving materials in advance allows attendees to prepare for the discussion and is an opportunity to remind them of the meeting and its objectives.

Files you intend to share should generally be stored in shared locations, avoid sharing files directly via email or sharing links. Use MS Teams or permission groups to give access to containers (document libraries or folders).

Use of document management is far easier if all meeting materials, regardless of how the meetings are run are maintained on an appropriate SharePoint site and links sent to participants. This cuts down on email traffic, a source of stress for many.

All members of the group should try and avoid printing out materials for meetings unless required for accessibility. This will save hugely on paper waste and reduce information security risks.

### **5.1.2 During the meeting**

### **Start on time, end on time**

Time management is an essential aspect of running productive meetings. Start and finish your meeting on time, keeping an eye on the agenda and on the time.

**Recording a meeting**

There is functionality to record meetings. This may help the note taker or enable others to catch up on the meeting later. If the meeting is going to be recorded, all members of the group need to be informed.

### **Guide the discussion and manage disruptions**

Guiding the discussion and managing disruptions are probably the most challenging parts of running a meeting, especially if you are not the most senior person in the room. Your role is to keep the discussion focused so that you can meet your objectives.

For example, if a point is raised that is outside the meeting objectives state that it is beyond the scope of the current meeting but make a note of it as an agenda item for the next meeting. The attendees then feel acknowledged without the meeting being side-tracked.

### **Summarise decisions and next steps**

Ensure notes are taken through the meeting and, at the end, summarise the main points, decisions, and actions agreed on.

## **5.1.3 After the meeting**

### **Circulate minutes**

After the meeting, where required, circulate a copy of the notes / minutes and any documents for consultation etc. in a timely manner.

Use of a SharePoint site can achieve this effectively. A dedicated Teams site for the meeting can mean delegates can access all papers in one place and reduce email.

### **Follow up on action items**

Ensure action progress is recorded ready for reporting to the next meeting.

## **5.2 Additional points for virtual meetings**

Before arranging the meeting consider the requirements of all invitees to ensure any issues with technological interaction are addressed in advance. Encourage team members to respond to meeting invitations as it helps to plan the need for breakout rooms etc.

### **5.2.1 Sharing documents**

If you regularly collaborate with the same group of people, consider setting up a Teams Group. This will provide you with:

* A SharePoint site to store shared files, lists and pages.
* A link to Planner to share tasks.
* A team notebook in OneNote.
* A Team area with channels to focus discussions, hold meetings and streamline collaboration.

### **5.2.2 Chat functions**

People who may be reluctant to comment in person may feel more able to do so in chat functions, and they can be a very helpful way to communicate during the meeting. However chat functions can be a distraction if not well monitored. Explain the purpose of the chat function in your meeting at the outset.

The Chat function should not be used to raise substantive points that require discussion by the whole group, rather it should be used to post stand-alone comments, for instance recording points of information or endorsement for the benefit of the Chair/minute-taker/speaker.

### **5.2.3 Managing questions**

Different groups have their own meeting culture, and it is good practice to clarify the process for asking questions at the outset of a meeting. Explain how to make comments or raise questions e.g the raised hand symbol, putting questions in chat, are questions to be taken as they are asked or taken at the end? Etc.

### **5.2.4 Use of camera**

Although having the camera on in the virtual meeting helps to re-create the feeling of an in person meeting and allows everyone to feel engaged and involved, some people will be unable to fully engage in a meeting if their camera is on. It is good practice to invite people to turn their camera off if they would find it easier to participate without it.

All persons running virtual or hybrid meetings should consider the guidance on ‘What’s Different When Communicating Online’, ‘Creating an Inclusive Online Environment’ and ‘How to Respond (to difficult situations)’ which has been developed by the Equality, Diversity and Inclusion team. [https://www.exeter.ac.uk/departments/inclusion/support/training/onlinechallenge/](https://eur03.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.exeter.ac.uk%2Fdepartments%2Finclusion%2Fsupport%2Ftraining%2Fonlinechallenge%2F&data=04%7C01%7CK.Lindsell%40exeter.ac.uk%7C76b47a9a10f74caf104f08da188d8523%7C912a5d77fb984eeeaf321334d8f04a53%7C0%7C0%7C637849293346751956%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000&sdata=8qnBVNlOLeFonPmJ5Jwwa3fZTCyHv%2BoXAkzSuBojuH4%3D&reserved=0).

## **5.4 Additional points for hybrid meetings**

Managers must consider how to be inclusive. If some staff are at home and some are on campus, meetings should be made as inclusive and accessible as possible with reasonable adjustments made where necessary.

Prior to a hybrid meeting, test the audio-visual set up for both remote and in-room attendees. Make sure the room has sufficient high quality microphones, and consider a hand held microphone to pass around. Think about where in-room cameras are positions: it is beneficial for remote attendees to see the faces of in-room attendees, any presentation slides, and any content created in the meeting on whiteboards etc. Consider a backup plan if technology in the room fails.

Avoid putting the meeting room on mute as remote attendees may feel excluded. A facilitator may be helpful to make sure online raised hands are seen, and remote attendees have their voices heard and are not interrupted.

All persons running virtual or hybrid meetings should consider the guidance on ‘What’s Different When Communicating Online’, ‘Creating an Inclusive Online Environment’ and ‘How to Respond (to difficult situations)’ which has been developed by the Equality, Diversity and Inclusion team. [https://www.exeter.ac.uk/departments/inclusion/support/training/onlinechallenge/](https://eur03.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.exeter.ac.uk%2Fdepartments%2Finclusion%2Fsupport%2Ftraining%2Fonlinechallenge%2F&data=04%7C01%7CK.Lindsell%40exeter.ac.uk%7C76b47a9a10f74caf104f08da188d8523%7C912a5d77fb984eeeaf321334d8f04a53%7C0%7C0%7C637849293346751956%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000&sdata=8qnBVNlOLeFonPmJ5Jwwa3fZTCyHv%2BoXAkzSuBojuH4%3D&reserved=0).

# **6. Booking process**

## **6.1 For central meeting rooms.**

Meeting rooms can be booked on our Exeter campuses [online booking system](https://admin.exeter.ac.uk/academic/timetable/rb/req09/).

Rooms that are enabled for Teams use in Hybrid Teaching Mode have high-definition cameras, microphones and a rear display that can be used to show remote participants. Centrally bookable rooms on Streatham Campus with this facility are:

* Building One Syndicate A
* Building One Syndicate B
* Building One Syndicate C
* Amory B105
* Amory 310
* Laver LT3
* Forum Seminar Room 4
* Forum Seminar Room 6
* Forum Seminar Room 10
* Forum Seminar Room 12

Many other rooms are enabled for Teams use but only have basic video function with audio. Rooms with the full hybrid option are planned for St. Luke’s and Penryn soon.

It is recommended that you check the facilities available and refer to the [Campus Activity Planner](https://universityofexeteruk.sharepoint.com/sites/CampusActivityPlanner) to check room capacity limits to ensure the room meets your needs before booking.

## **6.2 Local bookings**

Bookings for some meeting rooms are not available on the central booking system. It is recommended that you check with the DCOs or local building managers to see what facilities are available and the local procedures for booking.

# **7.Rooms and equipment**

In advance of the meeting familiarise yourself with the technology and software available in the room and ensure you know how to use it.

Bookable rooms are designated as ‘Teaching’ or ‘Meeting’; this refers to the section of the room that cameras and microphones are focussed on. Meeting rooms have cameras facing the attendees while teaching rooms have them focussed on the front of the room or the lectern position. If a room is listed as Meeting and Teaching the cameras can be switched between the two orientations using the AV control panel. For further information on MS Teams/Zoom functionality in bookable spaces visit the [Enhancement Hub](https://universityofexeteruk.sharepoint.com/sites/EnhancementHub/SitePages/Teaching-Room-AV-Capabilities-and-Features--Frequently-Asked-Questions.aspx).

If you need help, information or guidance on the technology you can book dedicated 1-2-1 support with an [IT expert](https://universityofexeteruk.sharepoint.com/sites/TheDigitalHub/SitePages/Get-some-time-with-an-expert.aspx).