2 Planning hybrid events

This section provides you with information on the event planning and how to make it inclusive and participatory.

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Introduction: interactive infographic

Nurturing a single shared space



Proper event planning should start well in advance and should consider all the specificities of your desired event. Because tech plays a critical role in these type of events, you will also probably need to hire and/or buy technical equipment that might be needed for audio, video and connectivity.

The meeting organisers will probably need to meet several times in order to go through the session outline and discuss the different needs. Always keep in mind that the main goal is to be able to host a session that promotes meaningful participation for both in-person and remote participants.

Therefore, it is important that the event planning takes into consideration several components:

- Develop a detailed agenda that takes into account time zones and suitable breaks. While on-site participants are all together in the same time zone, remote participants could be located anywhere and event times might not be ideal for them.
- Think through the various activities and how to develop them in such a way that all the participants (on-site and remote) can become equally involved.
- Discuss the needs of the physical space. Agree on the location, room specifications and other needs like very good internet connectivity, sound and video devices, etc. According to the number of participants and session dynamics, agree on the best physical room layout, including the positioning of lights, chairs, tables and the "stage". Re-think the outline bearing in mind that screen sharing and presentations can hide the view of remote participants, so they should be used sparingly and the spotlight should be returned to the live video feeds of remote participants as quickly as possible.
- Define the teleconferencing tool be used. There are many technical solutions available. At APC we use either Zoom or a free/libre open source software (FLOSS) option called BigBlueButton (BBB).
- Discuss the roles that are needed and how many support staff will need to be involved.
- Assign tasks and roles, define the budget and develop a detailed event plan.
- Have alternative solutions ready in case of connectivity problems or disconnects.
- Consider a small fund to cover care expenses and other special expenses of remote participants, so that they can, for example, cover their connectivity costs if they have to move locations, pay for daycare for their kids, etc.

To facilitate interaction, engagement and a warm experience, it is important to create **one shared space for all participants**, be they remote or in-person.

The physical location characteristics are also important, as the room should be specifically designed to make on-site participants aware of the remote participants. There should be cameras, speakers, projectors or TV screens and microphones on-site so that remote participants can be fully integrated.



A setup that can help inclusion must take into consideration the following:

- A circular chair layout works better than “schoolroom” models of chairs in rows.
- Everyone speaking on-site must use a microphone, so that remote participants also hear. Situations where several people are talking at the same time should be avoided, because it will be confusing for remote participants. Therefore, there must be clear rules for the use of the microphone, and also for making sure that remote participants get the chance to equally participate.
- The speakers in the room must be properly positioned and the volume adjusted so that remote participants will be properly heard by everyone in the physical room, if they chose to intervene.
- There need to be several camera views, at least two. We have found out that a general room view provides good contextual info (where people are sitting, what the space looks like, if people move, etc.), while closer shots with the camera pointed at the person(s) speaking allows remote participants to read body language and interpret feelings. Changing the camera angle regularly helps online participants feel connected.
- When a remote participant speaks, it would be good if the on-site colleagues can see them projected on a screen, as this enhances the perception that the person online is “present”.

- Having someone texting and sharing information with remote participants about things that are happening among on-site participants that might not be easily understood, such as explaining a background noise (sea waves crashing on open windows) or an abrupt laugh, will help in connecting remote participants with the atmosphere on-site.



Roles

A hybrid meeting connects two distinct spaces and for this reason requires permanent coordination between the on-site and online spaces.

The number of support people can change according to the group size and resources available. In some scenarios one person can play more than one role, although this is not recommended.

Ideally the following roles are needed in order to support and moderate/facilitate the conversations:



- **Facilitator** or **session host(s)**: The people who facilitate the session flow, open the spaces, run or co-run the activities, organise the discussions, conduct the opening and closing of the event. They normally are on-site, but could also be online, or there could be one in each space.



- **Remote moderator**: A person who is on-site or online, but has the very important role of connecting both worlds. They alert the facilitator(s) about requests from the online space or on technical issues, and keep remote participants informed about what is happening in the other space when necessary. They can also help with presentation slides and online activities. **The remote moderator, regardless of the actual space they sit in, has to be connected to the BBB/Zoom platform, and this is their primary space of interaction.**

In hybrid settings the **facilitator or session host** and the **remote moderator** need to be in direct contact and check with one another regularly, because this will ensure the necessary “back and forth” for the inclusion of participants in each other’s spaces.

They can agree to verbally check in periodically, or for the remote moderator to unmute and jump in if needed. When possible, the remote moderator should be on video to facilitate the exchange of visual clues with their co-host.



- **Tech moderator:** This is a remote role, and is the person who takes care of the online tool being used for the remote participation. They monitor connectivity, audio, video, projectors, and uploading and sharing of presentations, among other tasks. They have to be the host/moderator of the Zoom/BBB room and are therefore responsible for allowing participants to “enter”. They also must be connected through a back channel with tech support, hybrid moderator support and the remote moderator, for troubleshooting.



- **Tech support**: One or more people participating remotely who can help participants connect, solve issues with sound or video, support interpreters and captioners in their setup, testing and needs, etc.



- **Hybrid moderator support**: This is an on-site role, and is the person or persons responsible for monitoring and troubleshooting video or audio issues. It is ideal to have at least two people for this role, so that one can be overseeing the online space and devices performance, while the other can move around to support camera and video needs, but this depends on the size of the event, its duration and budget. Common issues that need troubleshooting are cameras turning off and needing to be restarted quickly, sound volume inconsistencies or disconnection, on-site microphones running out of batteries, etc. They should be connected to BBB/Zoom with back channel conversation with tech support and the tech moderator for status updates and troubleshooting.



- **Camera and microphone handler (on-site support)**: Anyone that can help pass the microphone, focus the camera on participants and speakers for close-ups, etc. Depending on the format of the event and profile of the participants, this role can be volunteer based. It requires some camera and framing experience. For small events there should be one camera handler and one microphone handler; for a bigger event (40+ participants) there should be two microphone handlers and one camera handler.

Additional roles may be desirable, such as:







DOCUMENTER



INTERPRETER

CAPTIONER

On-site room setup guide

How the physical room is set up affects the success of a hybrid event. This is some advice on how to prepare such a space:

- Remote participants should have a camera view of the room to have a general idea of the space and how people move within it. A wide angle camera located in a high point can be useful. For a long event, change the location to another angle, to offer variety.
- A projector with a screen or a large TV should be used to share views of remote participants. This should be located in such a way that it is visible to all on-site participants. Select a room with natural light but make sure it is dark enough to allow a good view of the screen as well.

