3 Running the event

Here we go into details about technical areas and things to watch out for regarding running a hybrid event.

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Pre-setup and testing

It is very important that the technical setup is tested at least one day in advance, to make sure that it works, make adjustments, and have time for further testing. It is recommended that this task be done during a workday and starting early, so there is time to change, hire or buy any equipment that is not working as planned. The test should be run using the same tools and online spaces of the real event.

The setup test should include the following activities:

- Prepare the room’s physical setup, including chairs, workspaces, screen/projector/TV locations, lighting.
- Install and test the sound system, including all microphones that will be used, and have extra batteries for microphones ready.
- Test the internet speed to connect to the platform that will be used. Have a connectivity backup plan ready (e.g. mobile data plan).
- Rehearse the whole setup with a main speaker in position to check lighting and position of cameras, microphones, screen and flip chart.
- Check that the screen/TV is correctly displaying what we see in the teleconferencing system (videos in spotlight, display, etc.).

Running the event

These are general recommendations for running a hybrid event:

- Whenever someone is speaking, they should be speaking into a microphone. The lead facilitator and remote moderator have to regularly remind the participants of the interdependency between the two spaces.
- If there is a space for questions or comments, you must ensure that remote participants have the same opportunities to speak as the on-site participants. The remote moderator has to monitor for raised hands and make sure that anyone who asks to speak is given the opportunity to do so.
- If the size of the TV screen or projector wall allows it, invite remote participants to keep their cameras on during the session. If there are too many of them to all be visible at once, or there are connectivity issues when too many people have their cameras on, the on-site and remote facilitators need to plan and design specific activities to invite the remote participants to appear on video in small groups or individually.
- Use another camera view for the speakers or groups of speakers. Make sure this view is available to remote participants. If the size of the TV screen or the projector wall allows it, a view of the on-site room should be kept side by side with a view of the remote moderator and willing participants.
- Depending on your participants' specific needs, you need to organise the material to be shared with them in ways that make it easier and simpler for them to access. This could vary from printing, showing on screen or creating a repository for access and individual download. To prevent connection overload and a possible break of connectivity, providing materials early on will help all participants to access them in time to download and have them beforehand, maintaining their focus on the conversation instead on searching for the files.
- If speakers use presentations, explain that you need them at least one day before to share them. If your TV screen or projector wall is small, consider printing out one copy of the presentation per table. Remind the speaker to write less text on slides and use good contrasts and images. It is ideal if presentations are uploaded to the Zoom/BBB room and screened via the projector on the wall to be seen by all participants. If this is not possible, run a presentation view on-site and in parallel online. However, take into account that traditional presentations are cold means of communicating, and create detachment from people. Think of alternative ways to convey the message.
- Note taking, if relevant, can be done using an online pad which can be collaborative or private and can be shared afterwards for input and additions. This makes key information on the discussion accessible to all participants. Note takers can choose to share their notes in real time or copy and paste their notes at regular intervals to facilitate participation.
- Automatic or human-made closed captioning can ease remote participation and increase focus, making the person/s speaking in the room feel closer.

- Allow adequate time for people to relax, stretch and disconnect. Be punctual when starting back after breaks.

Opening the session

The main facilitator should briefly explain the hybrid model during the opening remarks:

- Explain the hybrid modality in use and acknowledge how we each must make an effort to make it work.
- Explain how important it is to use the microphone whenever you are speaking.
- Explain where the cameras are and how to position yourself when taking the microphone.
- Remind participants about the importance of introducing themselves when they start to speak so remote participants know who is speaking.
- Introduce the people who are connecting remotely.
  - People being introduced should be encouraged to be on camera and added to the "spotlight" by tech facilitators.
  - Just a quick greeting should be enough at this point. Depending on the available time, a more detailed introduction can take place later during a round where both remote and in-person participants introduce themselves.
  - In a large, more formal meeting, tech facilitators, documenters, captioners, interpreters and other support people who are connecting remotely should just be mentioned instead of participating in this pre-session round of introductions, to save time.

Tips for hybrid events

- A slower pace is key to facilitate interactions between different spaces and experiences. It gives time to all participants to follow one another, and to moderators/facilitators to monitor the two spaces and troubleshoot if there are issues.
- You need to design the content, goals and timing for the slower of the two spaces, the online one.
- Prepare and copy on a flip-chart and an online pad/presentation written instructions for exercises in plenary or groups, questions to be answered, and in general anything that participants need to focus on and have access to beforehand for their effective engagement.
- Prepare group lists to facilitate rotation and interactions among participants.
- Remember that while it is easy to improvise on-site in response to body language and unforeseen situations, online participants will not be part of this interaction. Facilitators need to bridge this experience.
- Keep in mind that continual adjustment of content and pace might be needed if additional needs are identified once the meeting is in process.

When only the speaker/s is/are remote:

- Create a welcoming space for the remote speaker to help them feel like part of the conversation.
- Have them be joined online by the remote moderator and two or three other participants. They can be people from the team or volunteers. Have them on video side by side with other people, not just the presentation. Explain to other participants why it matters.
- Give them a close-up view of the room so they can gain a sense of the space that on-site participants are sharing.
- The facilitators and remote moderator can plan an opening and a closing activity to get on-site participants to use their bodies. Listening to someone on a TV screen is tiring and after 10 or 15 minutes, people will lose focus or interest. Think of interactive formats where participants have roles to play, such as a radio show: they can be interviewed or play promotional spots or sing. Fun brings back interest. Announce this activity the day before to create excitement in the room.
- Inform remote participants that they can choose which cameras to see, depending on the tool in use.

About activities

Depending on the event objectives, number of participants and event format, you might want the participants to work together in activities that can be done on-site and online.

- Activities that are done manually bring back energy and focus. Think of “analogue” group activities that can be replicated online
- If you design activities, make sure remote participants can also participate in them. It is important to keep in mind that flipcharts and sticky notes are very hard to transmit to remote participants in a meaningful way. Use shared pads, collaborative editing or online drawing instead.
- For icebreakers or connecting activities, online tools and platforms such as Mentimeter can be used to screen word clouds and create an interactive conversation with participants from the two spaces.
- Keep things simple. Don’t stress or obsess about the one tool to connect them all; give people enough time, and trust that they will be able to find solutions. Be around to be their sounding board if they call on you.

About breakout rooms

Some events might include the possibility of having participants break into smaller groups in order to work together.

Breakout rooms can be designed as separate on-site and online groups, or teams with a mix of both on-site and online participants. The following table compares both models.

Model	Pros	Cons	Requirements
On-site and online groups separated	Easier to organise.	Less flexibility in combining participants – segregation effect.	One facilitator for each online group, while on-site groups could have one or more facilitators that move around.
Mixed groups	Better integration of all participants.	Requires more planning and facilitation resources. Requires rooms or spaces that are quiet and have good connectivity.	Requires at least one camera and one speaker per group. Groups have to be small and on-site participants have to use a microphone. Activities have to be online (i.e. notes).

Which model you choose would depend on your group size, resources, event dynamics and objectives.

Principles of participation

Similar to any other event, there must be general principles of participation, shared before the start of the convening/event as part of the logistics advisory.

Print and distribute one copy per table or alternatively list them on a flip-chart big enough to be readable for in-person/on-site participants. For remote participants, a presentation or web page link can be shared via chat.

If the moderator/facilitator of the session is on-site they can read out loud from the flipchart and ask everyone if there is anything to add or remove/change. They will mention the link for the remote participants and invite the remote moderator to share the link in the chat.

The on-site moderator and remote moderator will then take rounds to facilitate participation and contributions from the two groups of participants: the on-site group and the remote group(s).

Tech support in online, on-site and hybrid spaces

Hybrid tech support can be hard to grapple with, as it is something rather new. It differs greatly from tech support for an "all online" meeting and tech support for a completely on-site meeting.

For example, support for online meetings requires tech staff to:

- Be constantly in touch with organisers and presenters to check the time and last-minute changes to the agenda.
- Admit participants to online spaces and filter/exclude the non-invited.
- Test and troubleshoot participants' audio, video and potential connectivity issues.
- Enable cameras and audio when participants have issues, and mute and disable cameras when they are introducing noise.
- Manage the global camera view and screen views that the participants get.
- Assist with sharing screens or other media.
- Create and oversee breakout rooms.
- Pay attention to dynamics in the chat.
- Preserve recordings (audio, chat and notes).
- Provide links to external tools like surveys, games, drawing pads, etc.
- Alert presenters and organisers about participants' requests.
- Communicate important information to participants.
- Support interpreters and captioners (if present).
- Support event broadcast to other platforms (e.g. YouTube – if applicable).

Meanwhile, supporting an in-person meeting will require the tech support person to:

- Test the internet connection and have a backup solution in case of disconnection (e.g. mobile phone data plan).
- Check that the projector, TV and/or screen are working.
- Make sure that microphones and speakers are working.
- Check that the presentation(s) and screen shares are compatible with the display and that they show properly.
- Troubleshoot any issues on presenters' computers and/or manage presentations and assist with sharing other kinds of media.
- Make sure that participants have access to microphones when they want to speak.
- Assist with changes in the room setup or lighting.

However, in a hybrid event we will have a mix of both worlds, and it is not just the sum of these two lists above – which are not at all exhaustive lists – but rather another layer on top of that, which is connecting these two worlds through technology.

This layer includes additional tasks such as:

- Set up and manage video cameras in the room so that remote participants have a feeling of being present and do not feel excluded. This ideally would imply two cameras:
  - One camera with the current speaker in focus, meaning that this camera needs to be managed and adjusted at all times – and it should also point to drawings, papers or any exercise space used on-site.
  - Another camera to give a broader view of the room, allowing remote participants to have a sense of room dynamics.
- Make sure people in the room always use microphones when they speak, so remote participants can hear what is said in the room. This also means that people should request the use of the microphone and not have parallel discussions that exclude remote participants.
- Make sure remote participants are audible in the physical room, which means connecting online audio to the room audio system.
- Make sure that remote participants are not excluded by relaying dynamics happening in the virtual and the physical room to one another through the chat.
- Make sure requests from remote participants to speak or intervene are noted by the facilitators.

The number of tasks and the fact that they all need to be done simultaneously require a team of two to four people present at the event, some on-site and some remotely. As we can see, some of these tasks do not require specific technical skills: all the tasks related to observing and communicating dynamics in and to the different rooms, as well as passing microphones and keeping the camera focused, can be managed by other people supporting the event.

Designing inclusive events

Running a successful hybrid event is not easy and there are many challenges. We have collected a few general recommendations that can help you in having a successful event:

- Recognise that while the experiences of on-site and online participants can be different, on-site and online participants are all equally contributing to the convening/event and every effort has to be made by all the team to make this **as inclusive as possible**.
- Event planning must be fully inclusive of both groups of participants, and you must dedicate particular care to the effective inclusion of the smaller participant group(s), be it the online and distributed group or the on-site group(s).
- You need to design hybrid plenaries and working groups in a way that everyone is able to meet and work together, regardless of how they are participating.
- You must recognise the importance of time and plan for a pace that allows all participants to absorb conversations and process information. Allow for spaces and breaks for everyone to rest and recover.
- Recognise the important role of technology and how you are dependent on it for hybrid events. But also consider all the limitations of technology. When tech fails, take a deep breath and move on. Glitches happen; don’t stay stuck in them. Have a plan ready if connectivity fails and the two components become disconnected.
- Recognise the onset of fatigue, especially for the team members engaging in a multiplicity of roles such as tech support, moderation and facilitation, documentation and note taking.
- Recognise the specificity of online fatigue and design the duration of the meeting in a way that is respectful and caring for online participants.

Be ready for potential issues

When connectivity is involved, you cannot be 100% sure that all will work perfectly. Therefore, it is good to be ready to react in case something doesn't go as planned.

- Have a communication channel for everyone participating in the organisation of the event, to rapidly be aware of issues and coordinate responses.
- Have a detailed event agenda with timings, so everyone knows what is happening and when they need to intervene.
- Have a plan ready in case the connectivity cuts in the middle of the sessions, so that remote participants and on-site participants can continue their work.
- Have alternative internet connection methods, even if at a lower bandwidth (e.g. 4G mobile phone access).
- Have extra people able to take over in case the remote facilitator has an issue.
- Have copies of all presentations and work materials ready for remote and on-site participants.