

Hybrid Events A Guidance



What can (not) be done virtually?

The pandemic has taught everyone on a large scale what can and cannot be achieved with virtual work forms – including virtual events. Some insights were new and, at times, surprising for most of us (e.g. that virtual events can significantly increase participation). This also led to expectations, cognitive patterns and actual practices having changed significantly in certain respects. The much quoted “new normal” now needs to be defined afresh since the option of meeting conventionally, physically has become available again. Many are articulating the need to combine the best (i.e. the advantages) of both worlds, analogue and virtual. To achieve this, that is the big challenge for “hybrid events”.

Virtual means can replace ↔ complement ↔ support
 ↔ analogue means

What can (not) be done virtually?

- (Not only) during the pandemic
- ✦ People actually experienced this as being feasible
 - ✦ New standards were established
 - ✦ Expectations shifted
 - ✦ New practices and habits developed

- What is reasonable?
- How much am I prepared to travel?
- How do I organise my life and my family?
- What damage are my practices (e.g. travelling) causing?
- How much flexibility do I owe whom?
- How available am I?
- How much can I actually deliver?

	Advantages of virtual	Hybrid	Advantages of analogue
During event	<ul style="list-style-type: none"> - Listening: People show more respect, listen more attentively, wait for their turn to speak; ordered proceedings - Rapid collation of data and inputs - Participants are forced to write succinctly - Participation increases significantly - Possibility of making contributions neutral (protection through anonymity, restriction of narcissism) - Multi-channel communication for people with different preferences, cognitive limitations (form of interaction, form of transmission: captions, visuals, audio, media) - Video can be switched on / off → focus - Less intimidating for introverts - Informal engagement is possible in a different way - Flexibility in terms of speed and timeline over extended periods 	How can we retain the best of both worlds by combining them skilfully and carefully?	<ul style="list-style-type: none"> - Parallel, unplanned meetings are easily possible - Informal atmosphere - Easier to manage cognitively (“Zoom fatigue”) - Stronger personal ties between participants - Meeting new people, networking - Serendipity as creative element - Physical activities, such as building models / forum theatre are possible (more easily) - Utilisation of physical spaces and atmospheres (e.g. experiences in nature, walk-about, physical activities such as walking) - Visual clues on presence / interest / emotions of participants (body language...)
Costs / Organisation / Logistics	<ul style="list-style-type: none"> - Event can be less limited in terms of time - Incorporation of people living far away - Facilitation of participation of people with limitations - Social distancing - In asynchronous activities, each individual can adapt the speed to his / her personal style / needs - Great creative opportunities in setting up the virtual platform - Better CO2 and cost balance without travelling 		<ul style="list-style-type: none"> - Creating ties to the grassroots (with local communities) - More spontaneity on the side of the facility (ability to improvise) - Possibility to get in touch with nature / outdoor exercises - Moderators are more accessible as human beings - Once you are present, you are actually present (fewer distractions) - Longer hours are possible per day - No challenges regarding connectivity / bandwidth - Social liability of a commitment

What are we actually talking about?

(Definition of terms)

“Hybrid” is one of the big buzzwords of our times. Yet, different people (unthinkingly) have completely different ideas of what a hybrid event actually is. Thus, a definition of the term “hybrid”, as well as of some other terms is necessary so that we actually speak of the same things and understand one another. Hybrid events can be “serial”, “parallel” and “satellite” hybrid events which are very different. Particularly parallel hybrid events can cover a broad spectrum. It is important to clarify and consciously decide in every case what kind of hybrid event is envisaged. This must then be transparently communicated to all parties involved in order to prevent unvalidated and implicit assumptions that could cause unnecessary confusion and irritation.

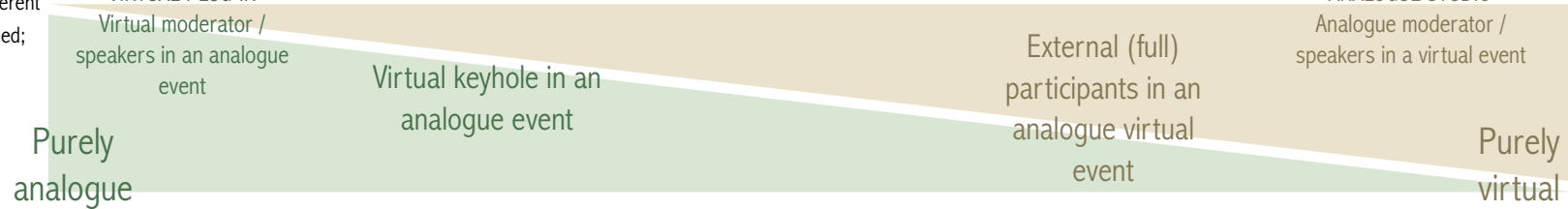
The distinction of
ONLINE v OFFLINE
 is confusing because it can refer to different
 dimensions and should thus be avoided;
 the distinction
ONLINE v ONSITE
 is much more sensible

It is important to define the exact location on the spectrum in advance and to
 communicate this transparently to all participants!

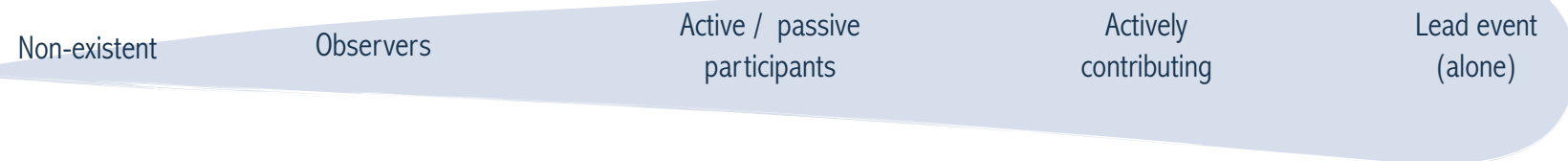
Special scenario II:
 "ANALOGUE STUDIO"
 Analogue moderator /
 speakers in a virtual event

onsite

online

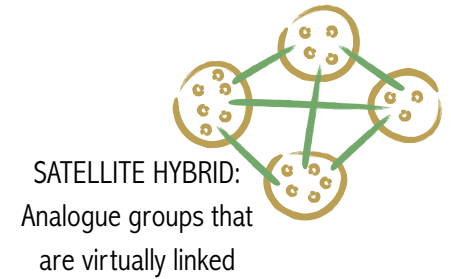
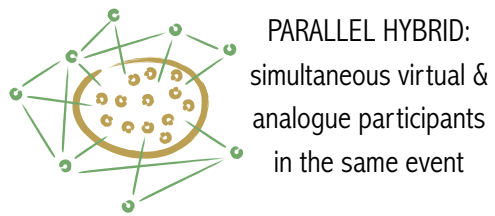
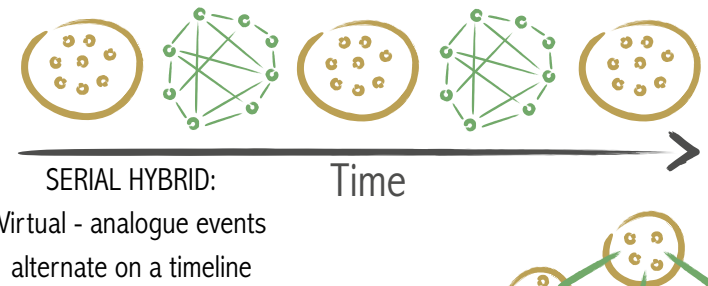


Role of virtual participants



What are we actually talking about?
 (Definition of terms)

Our language discloses our attitude:
 do we actually consider virtual events as inferior?
 Phrases with negative connotations:
 "we must just hold the event online"
 "when we can meet live again"
 "we'll wait until we can do it properly again"



Asynchronous events
 Participants collaborate online according to individual time schedules / speeds

Synchronous events
 Participants collaborate online in "real time", i.e. at the same time with direct interaction

How do you take an informed decision for or against a hybrid event?

Whether an event is to be a hybrid event or not (i.e. whether it should be purely analogue (onsite) or purely virtual (online) should be an informed decision. This includes answering a couple of questions. Some fundamental criteria will help in considering the benefits and thus in reaching a decision. On this basis a cost-benefit analysis can be made, i.e. the various costs must be added and compared to the expected benefits.

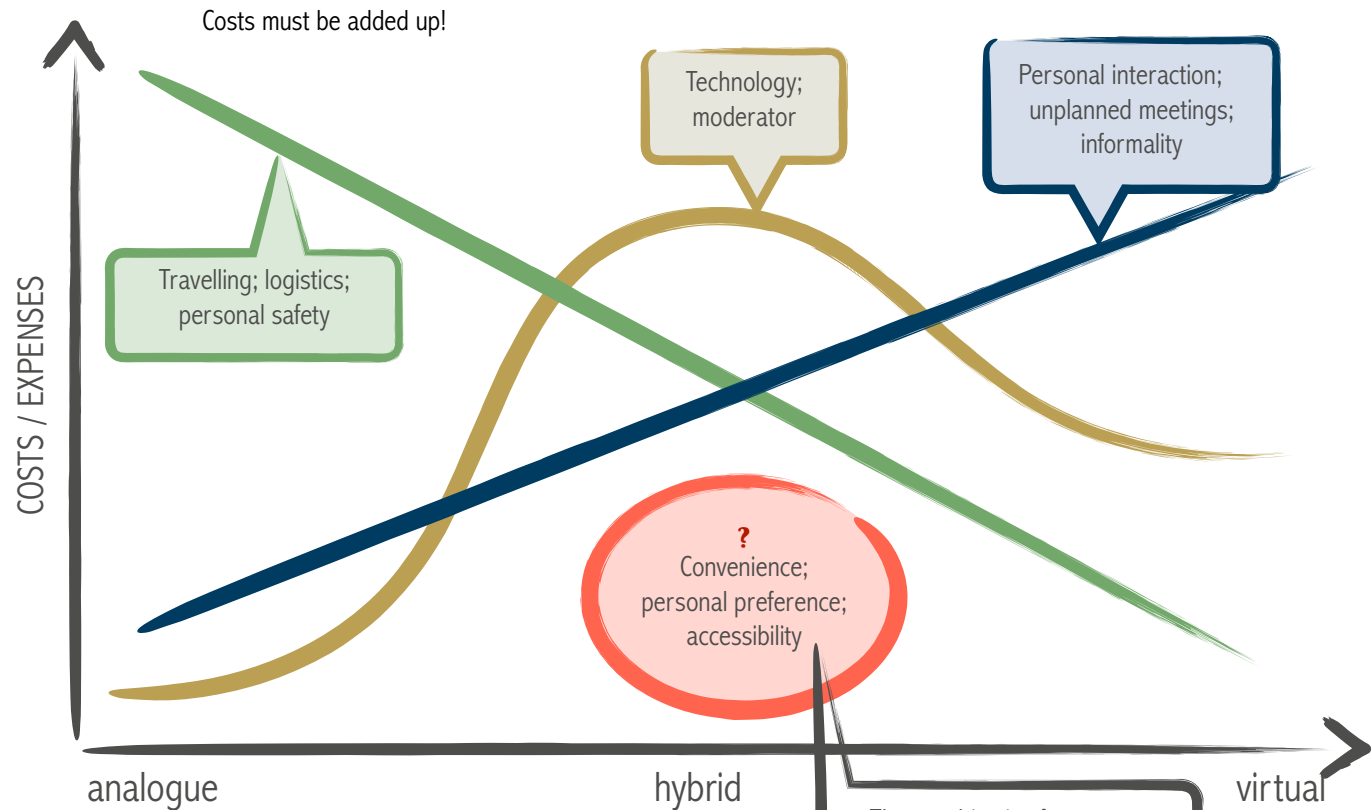


The following three tables refer mainly to “parallel hybrid” and – to a limited extent – to “satellite hybrid” events.

“Serial hybrid” events are much simpler because they merely alternate purely analogue and purely virtual events where everyone just follows their own “pure” logic.

Important questions

- Where on the analogue-virtual spectrum do you want to position yourself? What would justify a hybrid event?
- How can you tap into the strengths of both forms, rather than being tied down by their weaknesses?
- What costs are justifiable when and for what (additional) benefits?
- What additional costs are balanced out by savings elsewhere?
- Who will drop by the wayside in each of the possible situations? Who will be "sacrificed"?



Are core and peripheral participants taken into consideration?

Geographic distribution of participants: "naturally" a significant group will find itself at a central location, while other individuals or smaller groups are geographically distributed.

Fundamental criteria

Maximise participation: the various participants have different cognitive / psychological / social needs / points of departure to participate fully & effectively. Some rely on onsite presence (elderly, tech-averse people, those requiring assistance...), others on online presence (introverts, those with cognitive challenges, such as persons with impaired hearing, sight or mobility, as well as those with special family needs...).

Cost trade-off: additional resources for planning & conception, moderation, technology (finances, human resources) are compensated by savings, e.g. redundant travelling and accommodation (e.g. the costs saved for 2-3 Business Class flights will easily cover other expenses); an improved CO2 balance must be factored in.

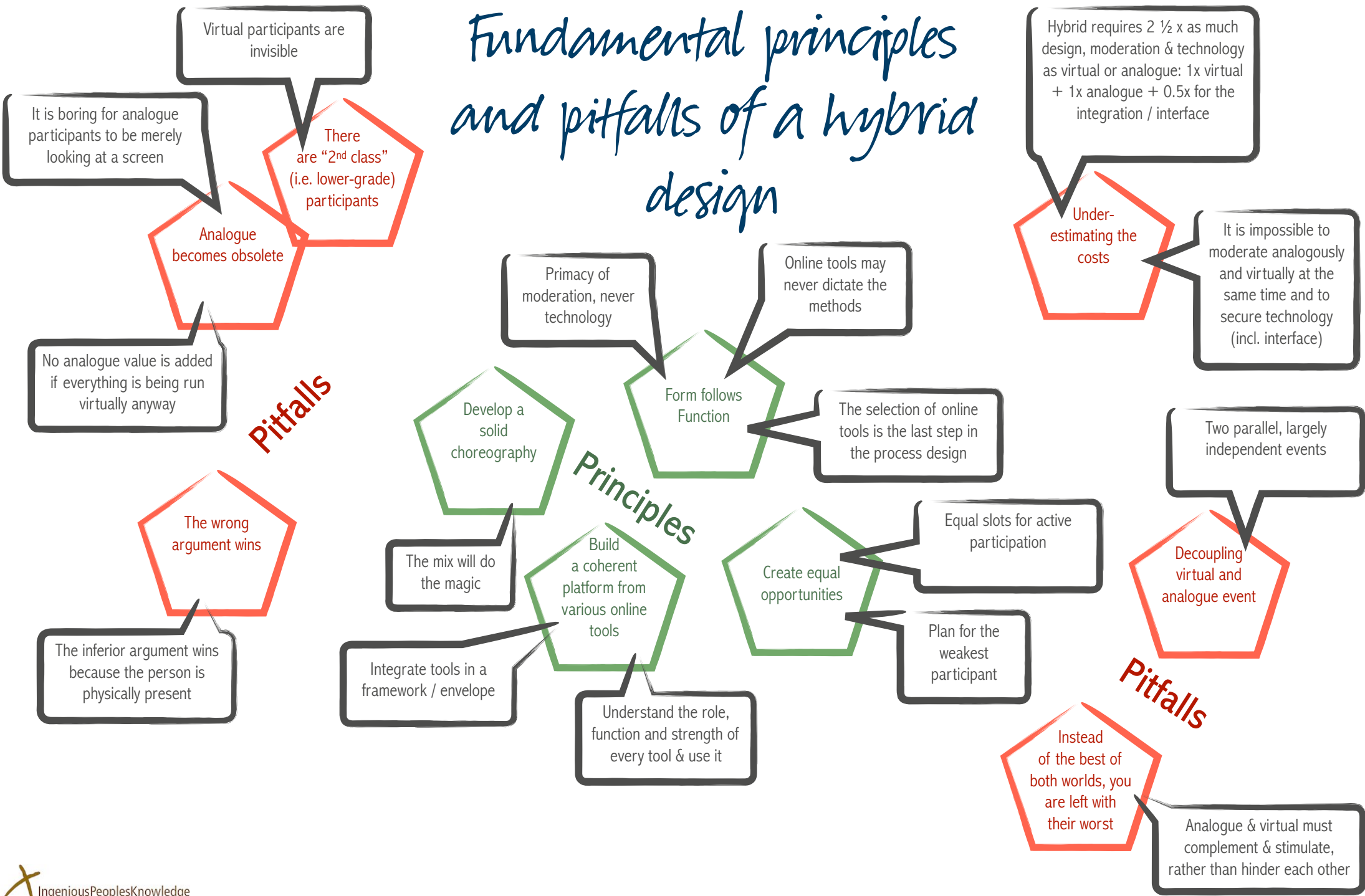
These subjective factors can gravitate to the one or other side, depending on the situation and the individual

How do you take an informed decision for or against a hybrid event?

Fundamental principles and pitfalls of a hybrid design

A range of fundamental principles will guide the format, choreography and specific arrangements of hybrid events. While these will often only apply to the design and moderation of all kinds of events, some will be of particular significance in hybrid situations. In addition, hybrid events hold a number of very specific pitfalls. In order to avoid these, certain imperatives should be followed in the design.

Fundamental principles and pitfalls of a hybrid design



Virtual participants are invisible

It is boring for analogue participants to be merely looking at a screen

There are "2nd class" (i.e. lower-grade) participants

Analogue becomes obsolete

No analogue value is added if everything is being run virtually anyway

Pitfalls

The wrong argument wins

The inferior argument wins because the person is physically present

Primacy of moderation, never technology

Online tools may never dictate the methods

Develop a solid choreography

Form follows Function

The selection of online tools is the last step in the process design

The mix will do the magic

Build a coherent platform from various online tools

Integrate tools in a framework / envelope

Understand the role, function and strength of every tool & use it

Principles

Create equal opportunities

Equal slots for active participation

Plan for the weakest participant

Hybrid requires 2 1/2 x as much design, moderation & technology as virtual or analogue: 1x virtual + 1x analogue + 0.5x for the integration / interface

Under-estimating the costs

It is impossible to moderate analogously and virtually at the same time and to secure technology (incl. interface)

Two parallel, largely independent events

Decoupling virtual and analogue event

Pitfalls

Instead of the best of both worlds, you are left with their worst

Analogue & virtual must complement & stimulate, rather than hinder each other

Conceptualising and designing hybrid events

A range of areas and aspects will help to successfully and effectively conceptualise and design hybrid events. The formal event design (process, choreography, rhythm and interaction) must be adapted to the specific requirements of the hybrid situation. Particular attention must be paid to the work in break-out groups. The definition and allocation of specific roles will assist in keeping the event on track and the participants of both spheres (onsite and online) on the ball. Informal processes can help in establishing ties and references across the borders between the two worlds. And the targeted use of technical infrastructure can also help to achieve integration.

Conceptualising and designing hybrid events

Formal event design

Different levels of hybrid during the course of the event

Alternate the focus of events between virtual and analogue

Higher cadence / shorter iterations in the programme

Frequent interaction between virtual & analogue participants

Don't let genuinely analogue means and formats fall short

Design two parallel processes / programmes / agendas

In introductory sessions, virtual participants must be involved / made visible repeatedly remain visible

and must remain permanently / repeatedly visible

Informal-personal processes

Buddy system: virtual-analogue pairs for informal exchanges

Also offer informal rooms online (e.g. Proximity Chats)

Technical infrastructure

Also use online tools in the analogue space, e.g. Q&A, whiteboards

equal slots

integration of outputs

blurring the analogue-virtual border

Working in online & onsite break-out groups

All groups integrate outputs online (esp. in twins constellations)

Create each group as an analogue-virtual "Twins"

same topic, same task, same function

frequent exchanges

Role allocation

Split roles in moderation & technology

Main moderator in the analogue room

Co-moderator for virtual process

Technical producer (driver) in the analogue room

Use of at least one interface person

who translates / transfers content via the analogue-hybrid interface

Every analogue group has an interface person

that immediately transfers analogue outputs online

A sneak peak into the future: Augmented/ Mixed Reality

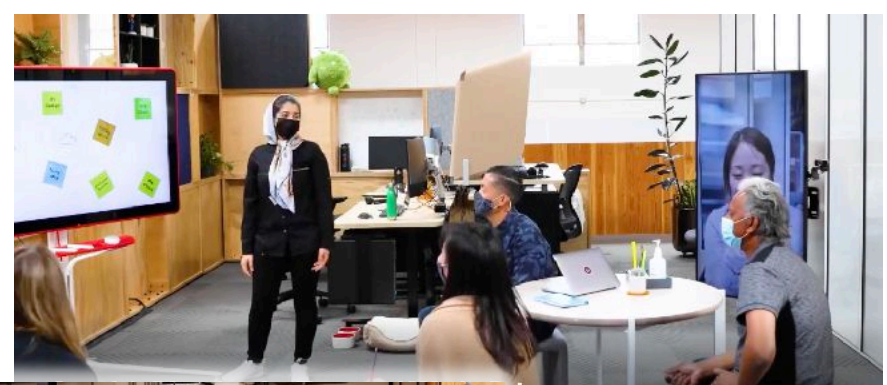
Regarding hybrid events (and other hybrid forms of being and doing), we are still at the beginning of a transition phase. Currently we are still hindered by unpleasant, irritating technical limitations. Many things still feel artificial, unnatural. Also, we are only just starting to get used to many new possibilities, to adapt these and to develop the necessary / useful skills – as individuals, as society, as environment.

This is a transition phase because right now new technologies, new forms of interaction are developing very quickly, mostly unnoticed by the public. What may often still appear as utopia / illusion / futuristic, de facto already exists. The technologies of “HoloLens” from Microsoft, “Portal” (and most recently the idea of the “Metaverse” from Facebook or “Project Starline” from Google are some examples (please note, all of them are being developed by tech giants, with the myriad of smaller innovators being even more difficult to discover and assess as laypersons) that are still in the exploration phase (and are neither accessible nor affordable for the general public). They are all still in their infancy and thus “inconvenient” for day-to-day use but are promising a rapid transformation of hybrid interaction.

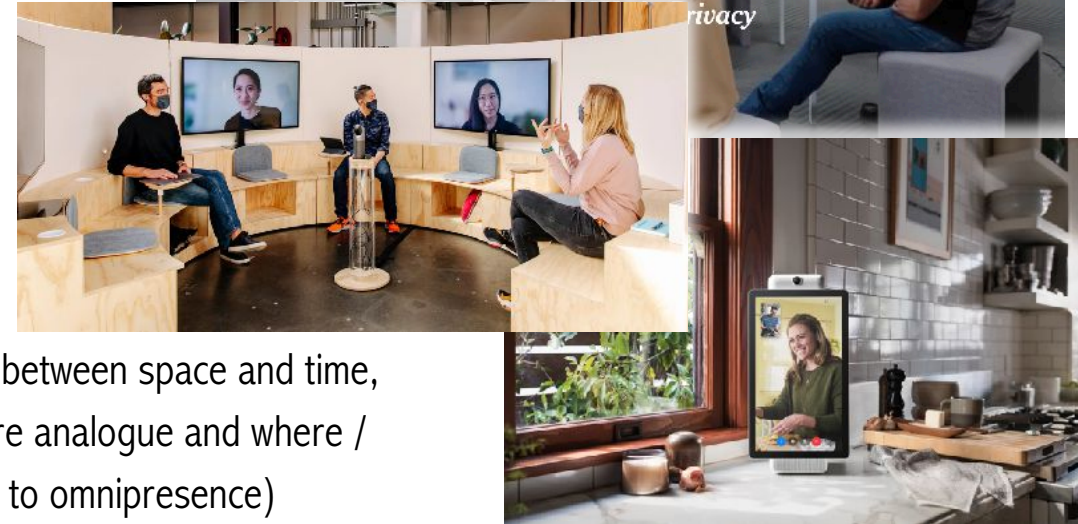


The gaming industry knows how to engage, motivate and keep people active virtually for many hours

A sneak peek into the future:



The transitions between analogue and virtual are becoming fluid, seamless and invisible



Blurring of borders between space and time, where / when we are analogue and where / when not (up to omnipresence)

Augmented / mixed reality

Virtual & analogue spaces become extensions of each other



“Devices” are disappearing / are no longer recognisable as such

Like TV studios we are incorporating the entire analogue space into the virtual presence



Soon we will cognitively ignore when something is virtual

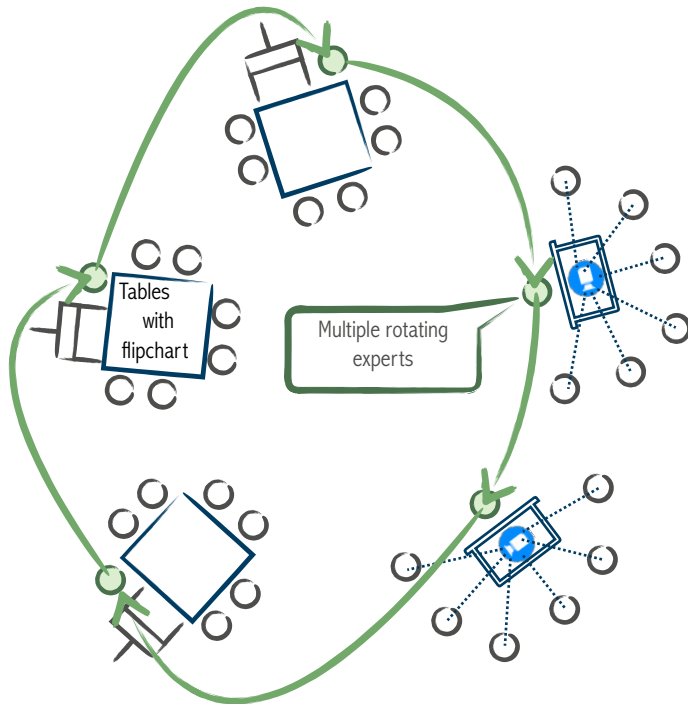
Technical guidance

Examples of hybrid formats

A) Expert briefings (aka Speed Geeking)

Underlying idea: Multiple experts circulate simultaneously from one break-out group to the next and repeat a short briefing, followed by a Q&A / discussion phase.

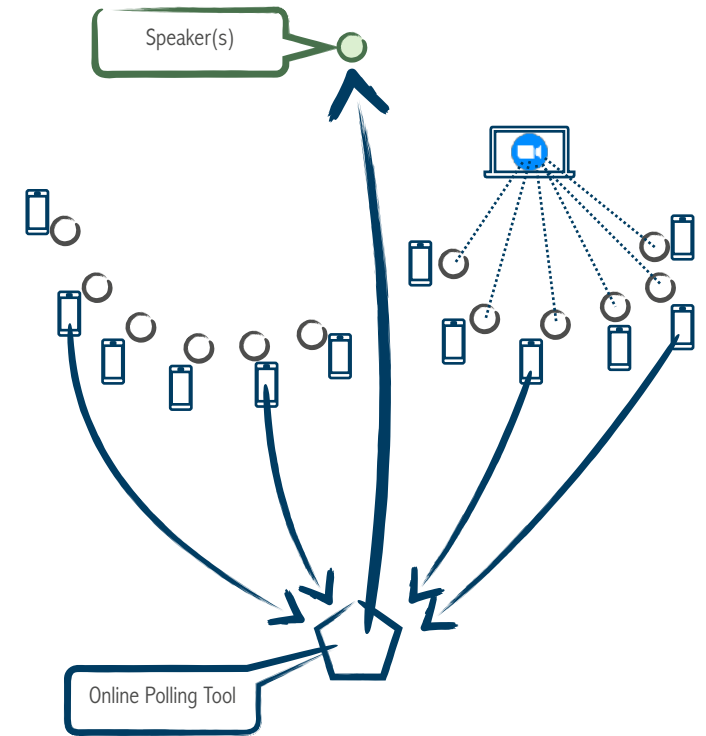
Hybrid form: While in analogue events all groups are sitting at tables, hybrid events will allow some groups to sit at tables and others to be constituted on Zoom (virtual tables). Experts move from a table to a notebook to a table and interact alternately with analogue and virtual groups.



B) Presentations (incl. panels)

Underlying idea: Experts / groups present and receive feedback (questions, comments) to which they can then in turn respond.

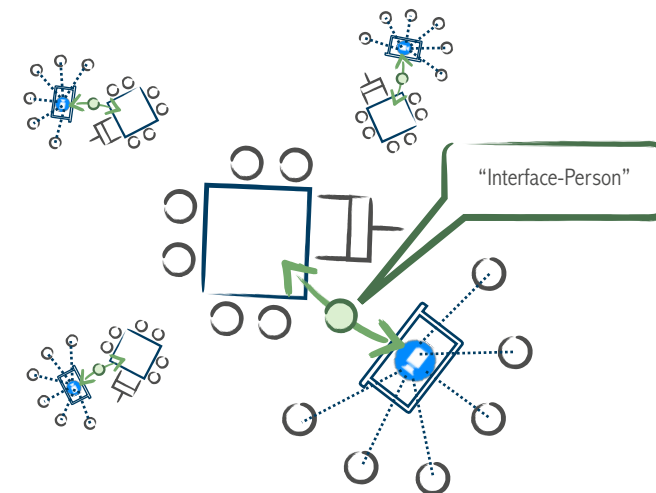
Hybrid form: Virtual participants join by video / audio; in order to ensure equal opportunities for all, all participants (whether they are analogue or virtual) use the same virtual channel to ask questions or make comments. Polling Tools make provision for this. They combine all comments in one stream and optionally allow an evaluation by the collective.



C) Group work (with analogue-virtual "Twins")

Underlying idea: The participants work in parallel break-out groups. Every analogue group has a digital twin that is simultaneously working on the same task. All groups have a pin board to collect their results (analogue or digital).

Hybrid form: Virtual participants form their own groups by video / audio; the groups are linked in pairs. One person in the analogue group acts as "human interface", i.e. transfers / consolidates analogue results to the digital pin board of the digital twin and informs the analogue group of the results from the digital group. At regular intervals (approx. every 15 min) both groups interrupt their work for a brief exchange with their twin in order to allow integration and mutual stimulation.



Example of a moderation plan

Calculation of time zones for international events

Separate moderation plans for online & onsite

Detailed instructions for tech online platform

Technical infrastructure online & onsite

Alternating sessions for online and onsite group



Example A) Expert briefings

Example C) Group work

Example B) Presentations

A roadmap for our programme					Aspired End time:	15:00	Total Duration:	300		
Date:	8/5/21	Start:	09:45	Effective End time:	15:00					
Step	CET	London	Bangkok	Duration	Process steps and lead	Onsite Facilitator - Instructions	Online Facilitators - Instructions	Online Production	Contributors	Infrastructure
Time Diff.		-1	5	in min						
# 0	09:45	08:45	14:45	15	Check-in, sound check	Informal welcoming of onsite participants	Informal welcoming of online participants	Settings in the Conferencing Tool Verification of audio / video quality		
# 1	10:00	09:00	15:00	10	Welcoming, programme	Welcoming by programme coordinator Presentation of agenda by moderator	-	Spotlighting of speakers in the Conferencing Tool Direct transmission of the opening address Share screen with programme	Programme coordinator	Beamer with screen; hybrid mode for virtual participants
# 2	10:10	09:10	15:10	20	Formulating expectations	Realtime poll on expectations Explanation of the Polling Tool for onsite & online Comments on results	-	Polling Tool: Share participation link in chat Share results screen (onsite & online)		Online Polling Tool via Smartphones
# 3	10:30	09:30	15:30	80	The 5 core elements of the programme: expert briefing (5 statements of 15 min. each)	Support of the 3 onsite groups: announcing the task, presenting the experts, setting time limits, monitoring the rotation of experts in the room	Support of 2 online groups: announcing the task, presenting the experts time announcements support	Divide virtual participants into 2 groups, link one analogue table to each virtual group Share task in chat Set timer, end groups	Representative A Representative B Representative C Representative D Representative E	onsite: 5 tables in the room: 3* with 6 chairs each 2* with 1 chair & a laptop with group call
# 4	11:50	10:50	16:50	45	Analogue: policy briefing with administration Virtual: fishbowl on research results	Welcoming of Ms X Moderation of the presentation with free Q&A	Welcoming of Mr Y & Z Moderation of fishbowl	Switch to Mr Y & Z in Conferencing Tool Operating fishbowl visualising on whiteboard Screen sharing of fishbowl visualising	Ms X Mr Y Mr Z	online: virtual double circle of chairs on whiteboard
# 5	12:35	11:35	17:35	45	Analogue: fishbowl on research results Virtual: policy briefing with administration	Welcoming of Mr Y & Z Moderation of fishbowl	Welcoming of Ms X Moderation of presentation with free Q&A	Switch to Ms X in Conferencing Tool Spotlighting of speakers in Conferencing Tool Screensharing of presentation of speaker Collecting & structuring of questions in chat	Ms X Mr Y Mr Z	onsite: double circle of chairs
# 6	13:20	12:20	18:20	20	Break	Time announcements	Time announcements	Opening virtual coffee lounge Set timer		Timer
# 7	13:40	12:40	18:40	45	Workshop on work planning	Allocating onsite participants to 3 groups Formation of pairs with a virtual group Nominating an interface person Announcing the task After 15 min & 35 min: interruption for exchange with virtual twin	Allocating online participants to 3 groups Formation of pairs with an analogue group Announcing the task After 15 min & 35 min: interruption for exchange with analogue twin Interface person continuously transfers results from pin board to whiteboard	Form 3 virtual online groups Nomination of one interface person each from the analogue room Opening an online whiteboard per twin Set timer		onsite: 3 tables in room: 3* with 6 chairs each, online pin board: 3 whiteboards
# 8	14:25	13:25	19:25	30	Closing discussion with programme coordinator	Short presentation of results of the 3 twin Brief reaction by programme coordinator Q&A through programme coordinator	-	Polling Tool: Share participation link in chat Share results screen (onsite & online)	Group spokesperson Programme coordinator	Online Polling Tool via Smartphones
# 9	14:55	13:55	19:55	5	Closing	Closing by programme coordinator	-	Spotlighting of speakers in Conferencing Tool Direct transmission of opening address	Programme coordinator	
# 10	15:00	14:00	20:00		End of event					

Alternating sessions for online and onsite group

Network plan for meeting room with hybrid set-up

