Hybrid Events
A Guidance

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Why not unleash ingenuity within systems?

Marc Steinlin/ September 2021

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".

What can (not) be done virtually?

Virtual means can replace ↔ complement ↔ support ↔ analogue means

(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	- 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?	- 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-abouts, physical activities such as walking) - Visual clues on presence / interest / emotions of participants (body language…)
Costs / Organisation / Logistics	- 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		- 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

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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.

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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 ore sensible

It is important to define the exact location on the spectrum in advance and to communicate this transparently to all participants!
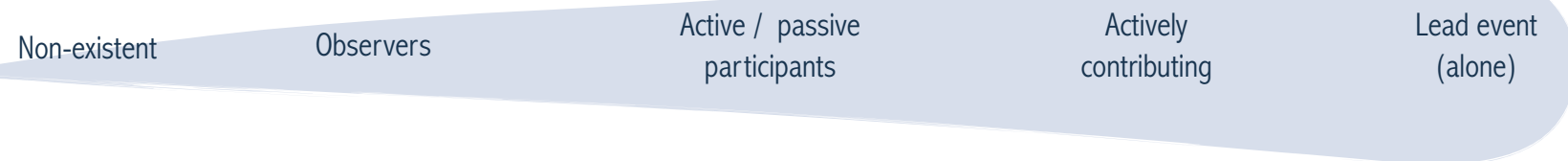
Special scenario I:
"VIRTUAL PLUG-IN"
Virtual moderator /
speakers in an analogue
event

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

Virtual keyhole in an
analogue event

External (full)
participants in an
analogue virtual
event

Purely
analogue

Purely
virtual

onsite

online

**Role of virtual
participants**

Non-existent   Observers   Active / passive
participants   Actively
contributing   Lead event
(alone)

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

SERIAL HYBRID:
Virtual - analogue events
alternate on a timeline

Time

SATELLITE HYBRID:
Analogue groups that
are virtually linked

PARALLEL HYBRID:
simultaneous virtual &
analogue participants
in the same event

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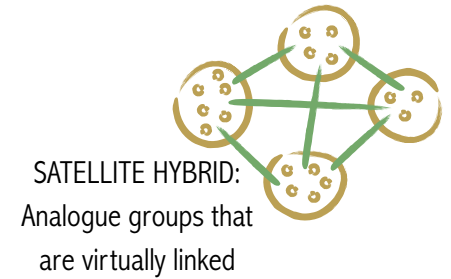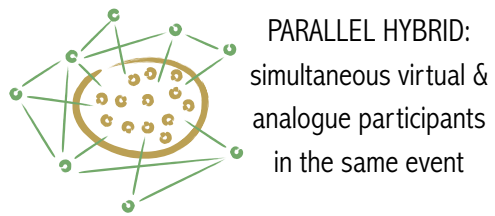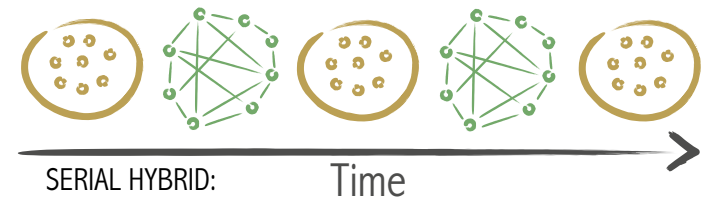
**Asynchronous
events**
Participants collaborate
online according to
individual time
schedules / speeds

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

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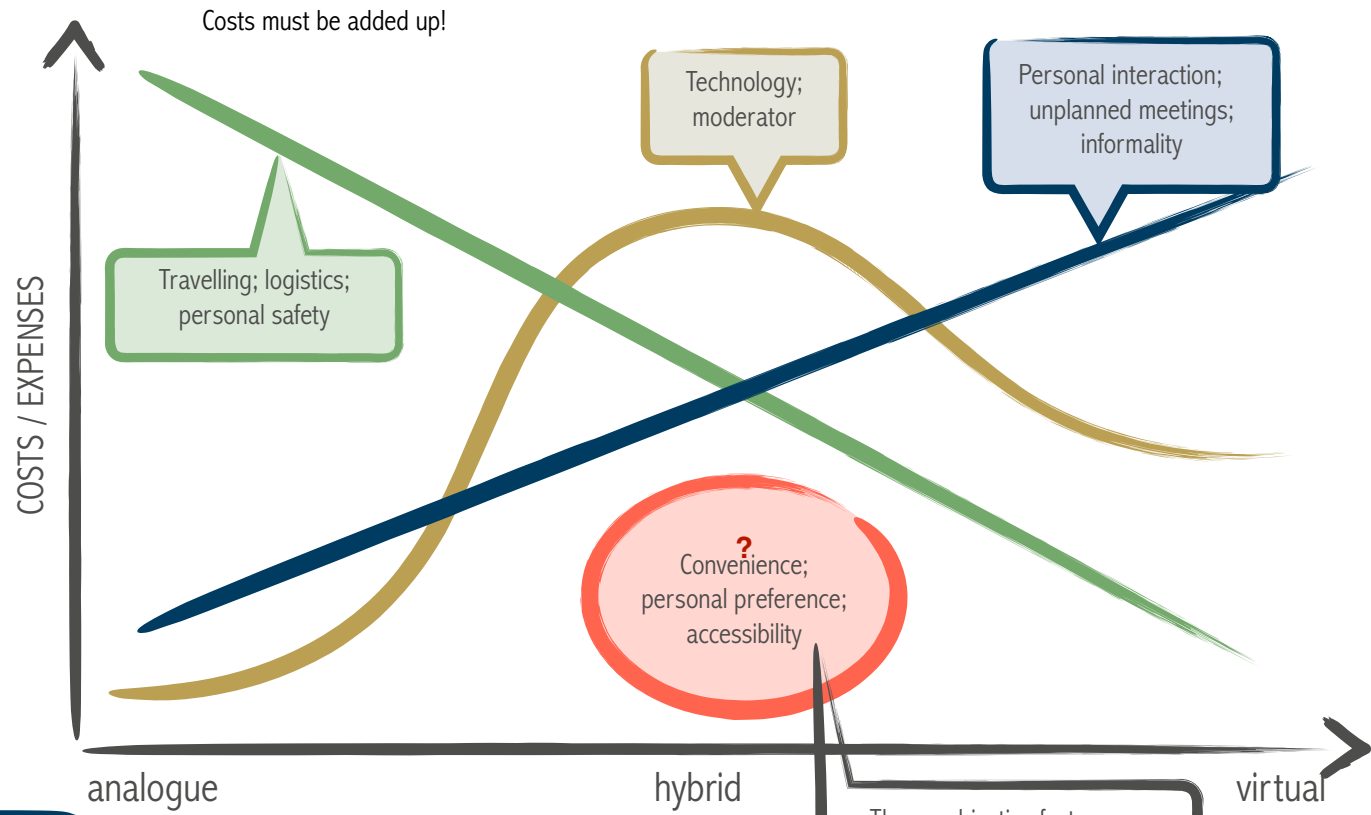
The following three tables refer mainly to "parallel hybrid" and – to a limited extent – to "satellite hybrid" events.

"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"?

Costs must be added up!

Technology; moderator

Personal interaction; unplanned meetings; informality

Travelling; logistics; personal safety

COSTS / EXPENSES

?
Convenience; personal preference; accessibility

analogue　　　hybrid　　　virtual

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

Are core and peripheral participants taken into consideration?

Fundamental criteria

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

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 CO_2 balance must be factored in.

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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

Pitfalls

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

The wrong argument wins

The inferior argument wins because the person is physically present

Principles

Primacy of moderation, never technology

Online tools may never dictate the methods

Form follows Function

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

Develop a solid choreography

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

Create equal opportunities

Equal slots for active participation

Plan for the weakest participant

Hybrid requires 2 ½ 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)

Pitfalls

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

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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, rythm 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

Informal-personal processes

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

and must remain permanently / repeatedly visible

Buddy system: virtual-analogue pairs for informal exchanges

Technical infrastructure

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

Role allocation

Main moderator in the analogue room

Split roles in moderation & technology

Co-moderator for virtual process

Technical producer (driver) in the analogue room

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)

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

Create each group as an analogue-virtual "Twins"

same topic, same task, same function

frequent exchanges

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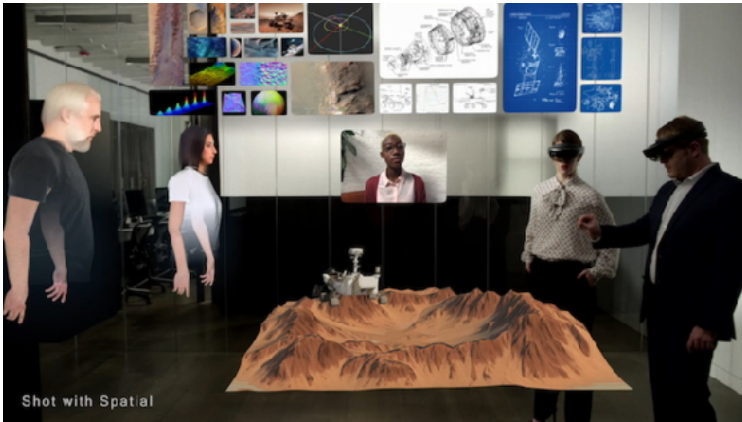
The gaming industry knows how to engage, motivate and keep people active virtually for many hours

A sneak peek into the future:
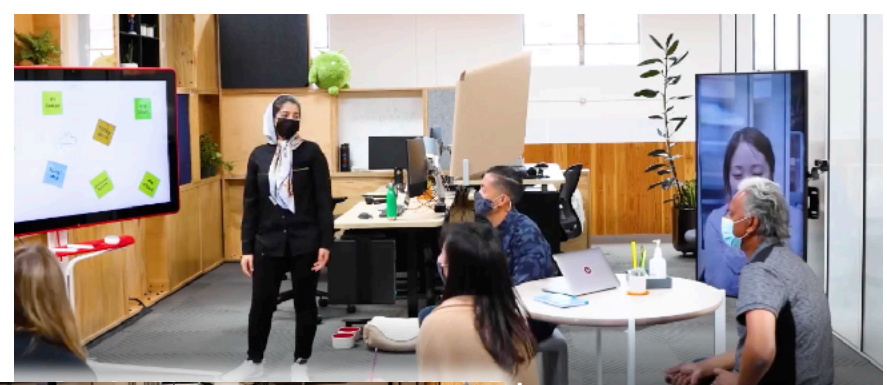
The transitions between analogue and virtual are becoming fluid, seamless and invisible

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.

Tables with flipchart

Multiple rotating experts
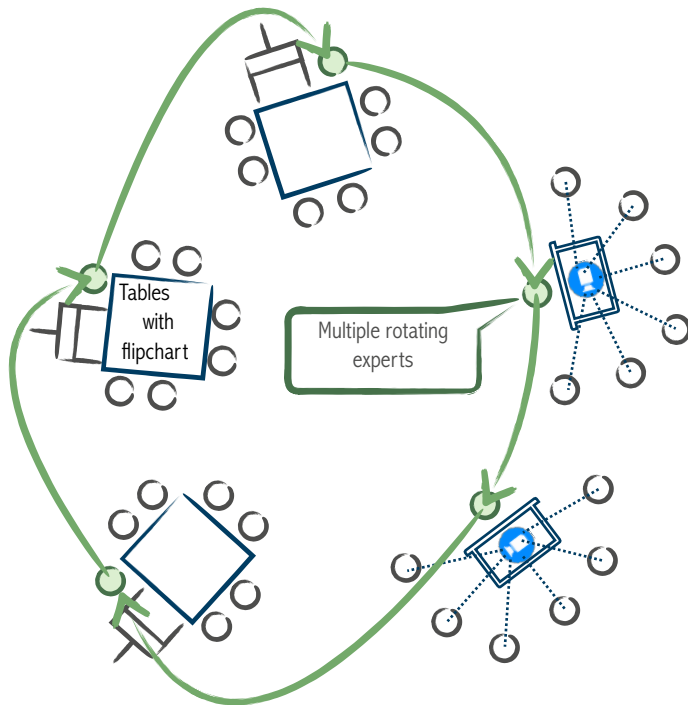
B) Presentations (incl. panels)

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.

Speaker(s)

Online Polling Tool
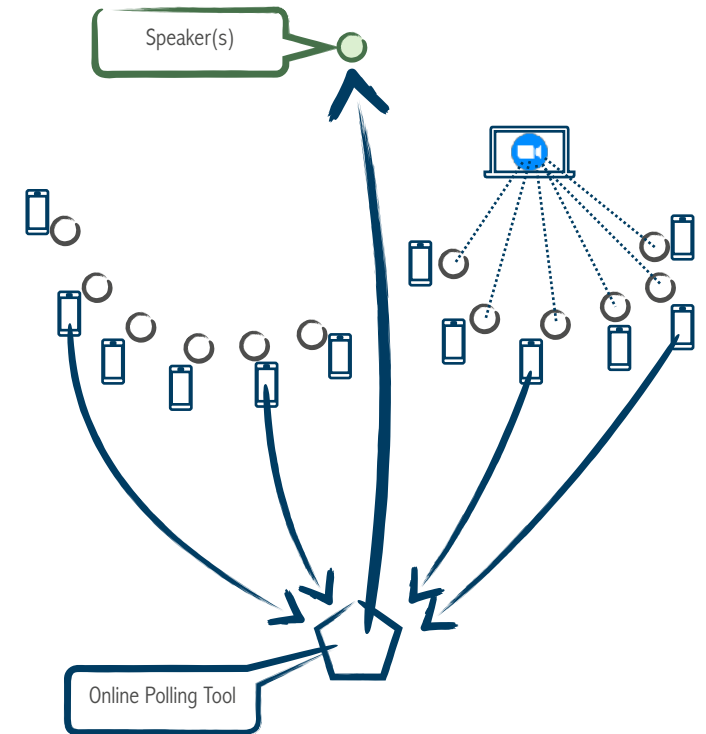
C) Group work (with analogue-virtual "Twins")

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.

"Interface-Person"

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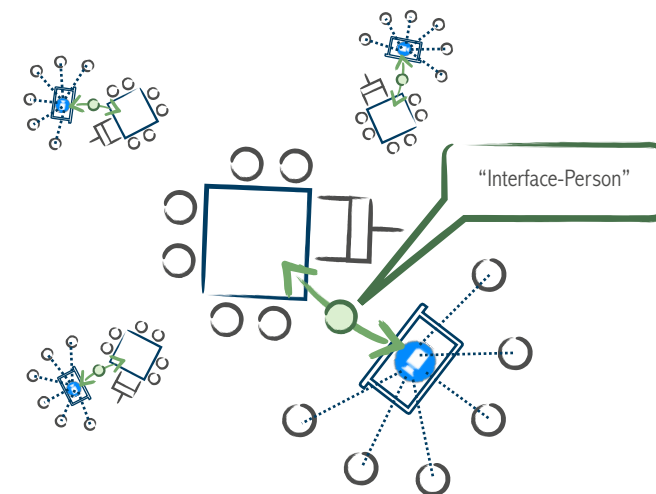
Example of a moderation plan

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

Alternating sessions for online and onsite group

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 Facilliators – 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 ✅ Spotlighting of speakers in Conferencing Tool	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 twins 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					

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Network plan for meeting room with hybrid set-up

Screen 1 for presentations/ movies

Room PA System

Screen 2 for virtual crowd

Orange: Video
Blue: Audio

Presenter

Room Mics

HDMI Splitter

(Auto-tracking) Camera

Zoom Speaker as a PA Audio IN

Projector as a 2nd screen

Camera as Video Source

Projector as a 2nd screen

PA Audio OUT as an Zoom Microphone

Screen share

Wide Angle Camera

Camera as Video Source

PRESENTER

HOST

AUDIENCE

TABLES

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