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Hybrid Meetings

Connect Digitally, Provide Engaging In-Person Experiences, Incorporate Essential Virtual Elements

Welcome

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Public Agenda is a national, nonpartisan, nonprofit research and public engagement organization.

We strive to strengthen democracy and expand opportunity in the U.S.

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Goals of Webinar

1. *Define what a hybrid meeting is*

2. *Examples and strategies for conducting hybrid meetings*

3. *Things to consider as you plan meetings and events*

4. *Tools and resources*

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What is a Hybrid Meeting/Event?

- Refers to physical location of participants

- In hybrid meetings, group of people attending are together physically

- Other participants join by phone or video

- Can be challenging to manage due to need for different accommodations & resources

- Remote work experts recommend this rule: if anyone is virtual, everyone is virtual

  - Meetings with remote participants should be planned and formatted around virtual piece

What are your hybrid meeting/event goals or needs?

Networking events and learning sessions/workshops

Getting content to participants while ensuring everyone stays engaged.

How to make this inclusive and equitable

Balancing attention between in-person & digital attendees

Increased access

promoting engagement and dialogue between online and in person participants

Community outreach/input

Inclusivity

keeping both virtual and in-person guests are engaged

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What are your hybrid meeting/event goals or needs?

Learning best practices and effective strageties to make hybrid events and meetings useful, engaging, and equitable.

Ensuring active participation and easy to utilize

Broader engagement with people who can't usually attend in-person

Challenges finding public places to hold meetings (no budget)

Workshops half day and multi day. Decision making. Issue exploration

Having effective meetings in the time of covid.

Technical Assistance with equipment

Haven't done it yet, so total newbie!

Large live meetings with virtual attendees

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What are your hybrid meeting/event goals or needs?

Ways to set up hybrid meetings on a tight budget (technology, staffing, protocols)

meeting needs of geographically dispersed groups

Making the meeting the most engaging and useful for all.

language access (bi-, multilingual)

How to create the best experience for Classroom and staff meetings that will be hybrid

To maximize engagement between remote participants & live (in-person) participants without creating inequitable dynamics. Increase inclusion overall (one silver lining of the remote meetings we've been doing is greater participation (ease of access).

Collective writing

To integrate in-person and online groups in meaningful interactive discussions.

Engaging Participation

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What are your hybrid meeting/event goals or needs?

Deliberating

Cheap options for the tech.

Finding value in the "in-person" meeting when many are remote. Is there one?

Public events with a range of tech capacities

Attending a meeting tonight that is hybrid! Looking for resources for a class on organizational communication that will cover this topic.

Groups sizes from 12-200

Greater participation by the members of the public

Collaboration/Tech

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Information Sharing

Middletown, Connecticut

Info Sharing (Local Governance)/Increasing Access for Public Participation

- Town leadership decision to retain virtual meeting format adopted during the pandemic

- Implementation of Cisco video conference system
  - Webex and Webex Assistant - platform allows for accessibility and public participation

- Legislation put into place to support making public meetings accessible through technology
  - House Bill 6448 & Senate Bill 183

- Hybrid format has created greater access for participation

- Funded through the city's operating budget

Application

- Using virtual tools and resources can open access for more people to participate in your meetings and events

- Flexibility to join online or by phone can help increase participation in community members who don't typically join due to barriers
  - Child care
  - Transportation
  - Timing of meetings
  - Weather

Collaboration + Community Events

Image Credit: Wonderlane, Unsplash

Emmanuel Presbyterian Church

Community Events

- NYC-based church holds services that can be joined in-person and by Zoom. Sunday service is held in a main Zoom room and offers Sunday school lessons for children from toddler through 6th grade in two breakout rooms. Zoom fellowship is available after the service.

- In-person attendees must register ahead (even infants) and adhere to COVID safety protocols that include masks and social distancing.

- Website provides information and links for in-person attendees: registration link, COVID Safety Guidelines, and an email contact in case people have not received registration confirmation. Online participants can also access downloadable pdf program for service and Zoom instructions.

Application

- Registration for in-person attendance for meetings and events
  - Plan for social distancing and other COVID protocols
- Create Zoom breakout rooms for virtual attendees to socialize during breaks
- Provide instructions for in-person and virtual attendance on website
  - Include contact information for each type of attendance should someone need assistance

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Austin, Texas

Hybrid Methods for Seeking Input from Large and Diverse Populations

- In response to Austin's rapid and diverse population growth the city held a month-long multi-channel consultation with community leading up to special virtual town hall meeting.
  - Vote on public engagement strategy to improve city process with goal of more and more effective public participation

- The virtual town hall allowed for in-person and digital attendance and participation
  - Streamed online and accessible through local television
  - Participants provided input through verbal comment, paper survey, telephone, text, Speak Up Austin forum, and Twitter

- Channels of participation were open throughout month allowing residents to provide feedback and comments before, during, and after virtual town hall

- Public participation through in-person and virtual forms has continued since this hybrid process

Application

- Provide key information and materials ahead of time
  - Make sure all participants receive same materials: surveys, agendas, reports, dialogue prompts, etc.
- Use variety of channels for participation
  - In-person
  - Zoom
  - Conference line
- Channels of participation that are open prior, during, and after meeting or event
- Share results for polls, surveys, and feedback in real-time
  - On screen in-person (or projected)
  - Zoom screen
  - Pause to read out loud for phone-in participants

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Joint Decision-Making

Image Credit: MD Duran, Unsplash

Invicta Toastmasters Club, Portugal

Hybrid Methods for Joint Decision Making

- Local chapter of international public speaking and leadership organization that transitioned to hybrid after pandemic lockdown restrictions eased in Porto, Portugal.

- Task force created to oversee move to hybrid format. Over several sessions task force and club members gave input and feedback on meetings allowing for adjustments from session to session.

- Use of polling software for speech competitions and Zoom chat function for sending feedback and evaluations to speakers

- Takeaways from Invicta Club and Toastmasters overall
  - For hybrid events important to create an equitable experience for participants online as well in-person
  - Stress adhering to rules and guidelines in terms of locality and venue
  - Weekly participation survey to keep members updated on rules/guidelines, number of participants for next meeting, any location schedule changes, and reminder to communicate inability to attend in-person to open spaces for others on waitlist.

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Application

- Some organizations like Toastmasters have been using hybrid methods for some time but important to acknowledge for most it's new and will be iterative and a "work-in-progress"

- Create ongoing feedback loop and work collaboratively with participants to determine what is and isn't working for the hybrid structure

- Use polling platforms or Google forms for voting and decision-making.

- Also may want to use collaborative online tools like Google Docs/Forms, Office 365, Padlet, for iterative collaborative work and decision-making processes

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Resources

Formatting and Structure

- Assigning Tech Producers – Delegate team members to operate tech equipment and monitor the online meeting platform

- Agenda Setting – Create a clear and detailed meeting agenda that outlines the intentions of the meeting

- Visuals to Support Conversations – Include visual elements that can help explain qualitative or quantitative information that may get lost in translation

- Pace the Discussion – Plan short, concise meetings and prioritize on keeping time and following the agenda

Resources

Technology

- Establish Digital Guidelines – Create a protocol that details what online participation should look like

- Tech Set Up – Using technology apart from a laptop is a great way for online participants to have access to the space

- Audio Is Essential – Use microphones to ensure online participants can properly hear and engage with in-person conversations

- Call In Instead – Some virtual participants may not have access to Internet or computer devices, prioritize meeting platforms that supports call in features

Resources

In-Person Considerations

- Protect Yourself & Others – Offer masks for those who require them and hand sanitizer to lessen the spread of germs

- Spread Out! – When setting up your space for meetings, space out tables and chairs to keep distance between parties

- CDC & Local Guidelines – Monitor national & local guidelines to see what practices are permissible for events and gatherings

Resources

Before The Meeting Starts

- Who's On Camera? - Discuss ahead of time whether or not participants will turn on video for upcoming meetings

- Prioritize Online Participants - Reinforce the fact that online participants are a part of the discussion, especially during input/comment segments of agenda

- Encourage Participation - Utilize polls, voting, and questions for all participants to share their thoughts and make decisions as a community

Resources
Challenges

Interruptions

In-person Activity

Technical Malfunctions

Workspace

Image Credit: Christina, wocintech.com, Unsplash

Let's Talk

Interactive Exercise

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- **Scenario 01** - Your team hosting its first hybrid town hall meeting - your town has permitted in-person meetings – vaccinated people are allowed to be maskless. As community members enter the meeting space, there are a few who approach your team and have expressed concern about others not wearing a mask in the building. *How do you accommodate members who are not comfortable with the current mask policy?*

- **Scenario 02** - Your team receives several emails from community members following the last town hall meeting. The members attended the town hall online and express that the connection was poor and that they were not able to participate in the evening's discussion. Your team is certain that the internet connection from the evening was secure. *How do you ensure remote participants who do not have a stable Internet connection can participate?*

- **Scenario 03** – An online community member, an older woman, is currently speaking to the room. There's a city council member in the room that is seemingly ignoring her and is making conversation with neighboring members. This member has also ignored and talked over the previous online speaker. *How do you address this community member while keeping your meeting on track?*

Scenario 01 - How do you accommodate members who are not comfortable with the current mask policy?

Encourage them to participate online

encourage to attend remotely

For in-person folks: Have everyone wear masks. More inclusive. I am not comfortable with asking who is vaccinated and who is not. This is my church's policy.

I think you have to be up front about that from the beginning so people can make choices for their own safety.

Separate space with online access that has a mask policy

1) provide an overview of the policy at the start of the meeting, 2) seek a separate physical spacing/distanced area, etc.

That is a microcosm of everything! Social distancing in the room

Perhaps invite a public health official to the meeting so they can explain current CDC guidelines or local health department guidelines. Encourage physical distancing.

Remind them of the rules/guidelines sent out prior to the meeting.

Scenario 01 - How do you accommodate members who are not comfortable with the current mask policy?

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agree; policy must be publicized w/ event

Communicate the mask policy in meeting invitation

I would have the room already set up socially distanced and have masks on hand to offer.

Reiterate the policy and read the CDC or local guidelines. Let them know that they can keep their mask on while attending the in person meeting

We let people know upfront that masks are not required. But we do pass our masks for those who may be pressured to wear them.

I would encourage them to phone in and make sure phone numbers are visible in invitations

Encourage phone-in for sure. Also, here in MKE the public libraries have been very helpful in providing Internet access & online meeting facilities for members of the general public. Maybe a partnership with local library system could help.

I have housekeeping slides I show when that happens

I would mute that person if they are not actively speaking to the whole meeting

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Scenario 01 - How do you accommodate members who are not comfortable with the current mask policy?

I've had this experience with Board meetings where you have to deploy all tech and experience to keep a meeting on track and running smoothly.

Also know which type of ZOOM product you're using. Power User accounts have a lot more features to control meetings and assist participants.

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Scenario 02 - How do you ensure remote participants who do not have a stable Internet connection can participate?

provide a phone-in option

Make sure phone call option is shared

ensure phone-in only options are given adequate time to speak

pre- and post-survey/input tools

Seems like phone in is the only option.

Their challenges are on their end. Which isn't satisfying. But turning off camera and microphone help.

Recording meetings

Recording and pre- and post surveys are good ideas.

If participants turn off the Video it helps them to hear and participate without seeing their video

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Scenario 02 - How do you ensure remote participants who do not have a stable Internet connection can participate?

We offer our library, and a rural Township Trustees office has offered to let folks participate from their office.

Periodically repost important links in chat

Follow up suvey allowing feedback

Pre meeting input survey so they can add topics to the discussion in advance

Assigned people whose job is to support participation. Participants could send comments via chat to a specific person, for example.

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Scenario 03 - How do you address this community member while keeping your meeting on track?

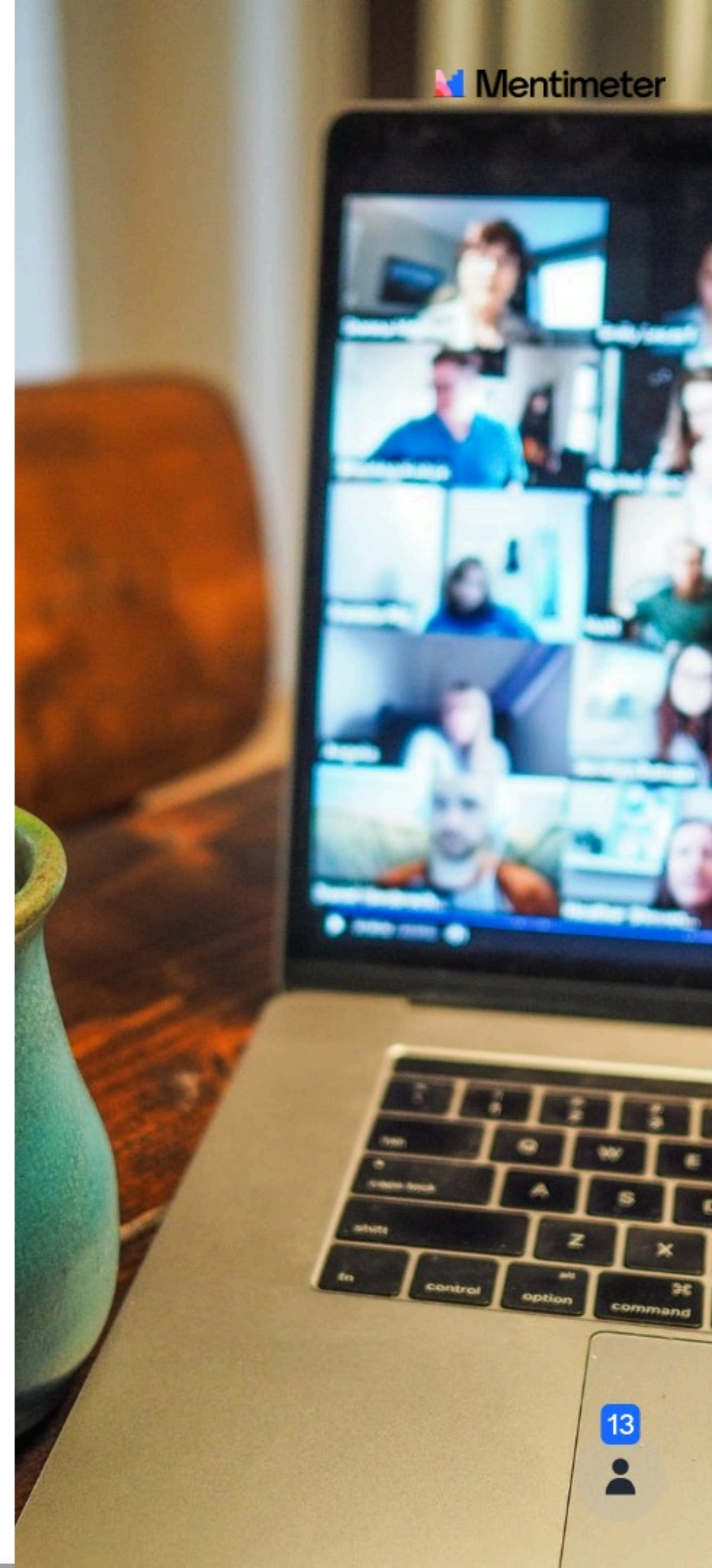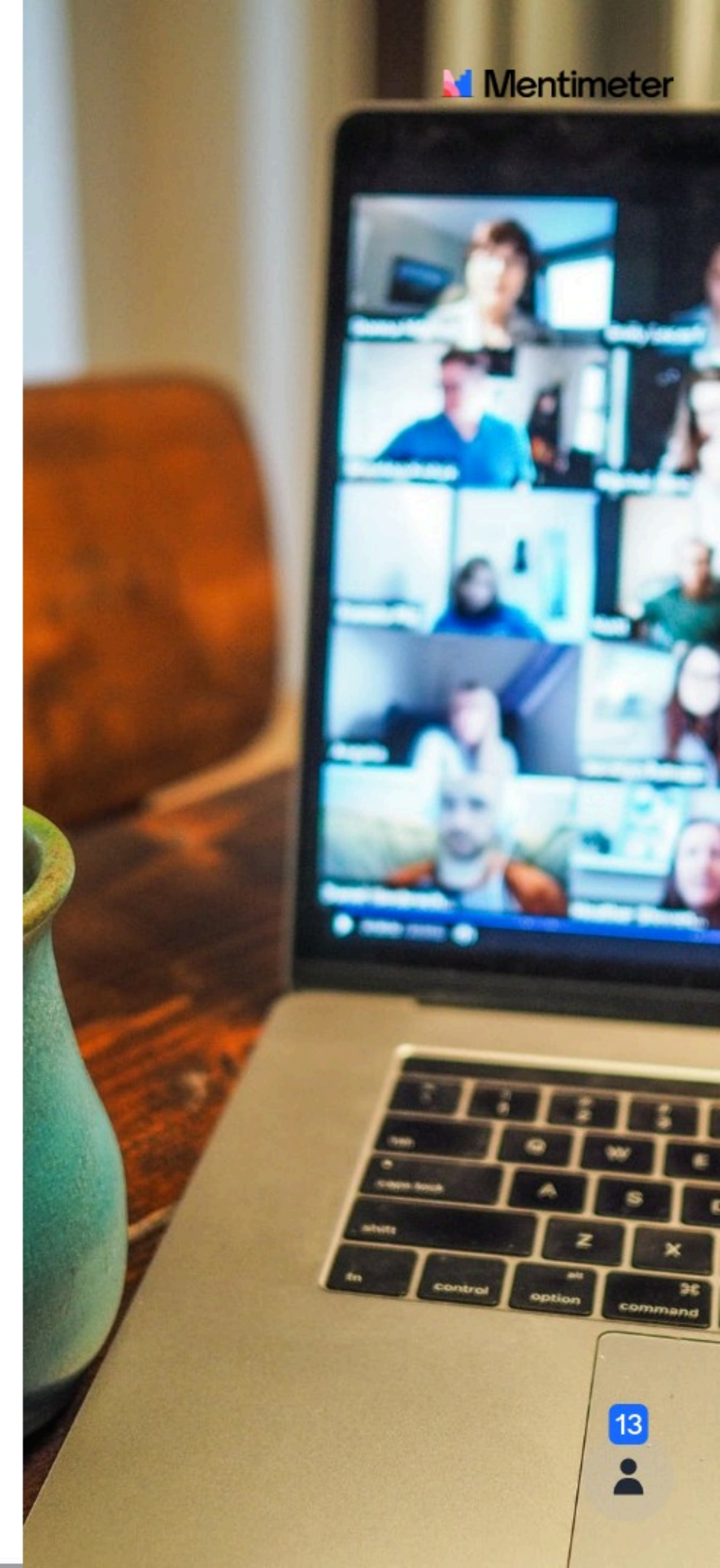|		
Ground rules! Enforced by a capable facilitator	direct message in the chat	if no other option, mute them
start with groundrules, discussion guidelines. reiterate as needed, then enforce...	Stop the meeting briefly and address the rules. If continues mute or remove to waiting room.	The facilitator just needs to step up and enforce common sense/ground rules of the group.
Have meeting norms in place, review at beginning of meeting & during meeting if needed	Capable and respectful facilitator. They should be explained as necessary to help everyone participate.	Enforce all discussion in the room to be through a microphone as well. Keeps the line between side conversation and participation more clear to people.

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Scenario 03 - How do you address this community member while keeping your meeting on track?

passively "we're hearing some background chatter, so we're going to mute everyone. Raise hand to be unmuted"

I guess we can't accidentally 'mute' her for a second. 🤣

Have waiting room enabled. Messages can be sent to the waiting room

But you do need to address the commenter and go over ground rules.

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Let's Talk { Discussion

What did you hear? Is anything resonating?

PLAN. PLAN. PLAN. PRACTICE. PLAN.

I'd like to learn more about effective ways to connect online and in-person participants.

Having several tech assistants on hand

Need to be aware of differing needs of in-person vs virtual participants and accommodate both

I think conflict resolution/meeting management is the most challenging part of hybrid meetings (for both facilitators and participants). We need to explore these options a bit more in depth.

Never underestimate tech challenges.

I appreciated the reminder about getting audio technology scaled right for hybrid meetings (especially with large groups in-person).

Good to see possible tools and approaches. Not really clear on the physical set up of a meeting to make these products work. Does it require purchase of additional camera/microphones to connect to a laptop to work effectively?

Where In person one facilitator is needed. Online needs two. Hybrid needs more. Planning hybrid takes longer than either online or in-person. Clients willing to experiment, fail and learn are needed as we invent ways of being together

What did you hear? Is anything resonating?

Facilitator needs to split focus. Address in person, and take deliberate time out to bring online into conversation. A tech assistance should be monitoring online and being the in person voice for that. the facilitator should not.

A separate tech facilitator should be dealing with member entering meeting online

Do a test run with set up team. Make sure microphones, admitting people, etc works.

It all seems overwhelming at times. Which is discouraging. But there is openness to new methods right now and that is encouraging.

Under-represented populations often face more barriers to participating, which means they are more likely to be online. So level playing fields between the two groups are essential. But it is virtually impossible to provide equivalent opportunities

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Are there any equity disparities that come to mind when thinking of hybrid structures?

Each new piece of tech has a steep learning curve for many!

As a facilitator/moderator, I tend to pay more attention to the people in the room with me, I fear that I may neglect the folks on-line. That's an equity "caution sign," for me to keep in mind.

Internet accessibility

The usual wifi access, device access, etc. Even cell service.

Internet accessibility especially for people in remote areas

online audience

always run your slides & website through a color-blind/ color-impaired check

Online tech is better able and more easily can support hearing impaired than in-person

Slightly different but the tech costs have a high barrier of entry for small orgs without much budget when trying to do a subscription, camera, mics, speakers, etc.

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Are there any equity disparities that come to mind when thinking of hybrid structures?

Level playing fields are essential. Under-represented folks are more often on-line.

While it's important to make sure online participants are fully involved, it would be a mistake to privilege online participants over participants in the room (have their faces appear on a huge screen in the room, voices more amplified etc.)

Our group is a community council advising our local police. Getting a diverse audience to attend has high barriers either in person or online. Transportation; access to computers. Offering both at least broadens access.

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Anything we should be thinking about that hasn't been mentioned?

I can see a community of practice emerging around hybrid meetings.

how to actually keep people engaged!

Truly balance both in-room and online participants so neither type of participation is privileged unnecessarily

The nitty gritty in process design to get discussion and deliberation happening in hybrid environments

Tiny orgs without budgets. Tools and tech options when you're buying it yourself.

Share recorded sessions that demonstrate best practices of hybrid meetings.

Would love to hear more about legal changes needed to allow online/hybrid public meetings for municipalities
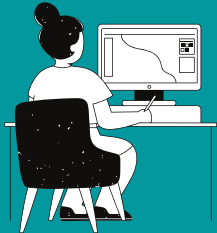
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Hybrid Meetings & Events Preparation Checklist

Preparing for In-person

- [ ] Develop a plan for how many people are permitted in the space at once.
- [ ] Spell out safety protocols for sanitizing surfaces, wearing masks, maintaining distance, eating in common areas, etc.
- [ ] Agree on any screening procedures for people attending in-person: recent travel, temperature check, and so on.
- [ ] Assign someone to communicate the protocols with everyone else and update the team or participants on changes to the policy.

First Hybrid Meeting/Event

- [ ] Purchase any technology needed and test ALL in a practice meeting.
- [ ] Send attendees detailed instructions on how to access the meeting.
- [ ] Adjust agenda to minimize blocks of reporting.
- [ ] Limit meeting time to an hour, or provide adequate break time.
- [ ] Set expectations: cameras on, microphones muted unless talking, participation is anticipated, and added patience for everyone.

Between Meetings

- [ ] Consider providing attendees with the same snacks or goodies prior to the next meeting to enhance a feeling of cohesiveness.
- [ ] Ask for regular feedback from attendees about what worked and didn't.
- [ ] Discuss a mentor or buddy program to pair staff members to increase rapport.
- [ ] Provide social time, either 15 minutes before or after meetings or at other times.
- [ ] Address any lack of meeting engagement privately between meetings.

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*Adapted from Boardable

Running Effective Hybrid Meetings, *Resources* ———

Articles

Hybrid Meetings: What They Are and 10 Tips to Make Them Work
Interactive Community Consultations on Austin's Public Engagement Strategy
Considerations And Best Practices For Running Hybrid Meetings
Is Your Team Only Partially Remote? Here's How to Run Effective Hybrid Meetings
This Connecticut Town Has Embraced the Hybrid Virtual Meeting
March City Council Meetings to Continue "Hybrid" Model
The Hybrid Work Model: A New Challenge For Diversity, Equity And Inclusion
What we learned from our first hybrid Toastmasters meeting

Videos

Create hybrid Toastmasters Zoom meetings using low-tech equipment
How to Have a Hybrid Meeting That Works for Everyone
Lead a hybrid meeting - 5 techniques you need to know

Technical Equipment

TechSoup - Software, Hardware, and Technology Services
Google for Nonprofits
Microsoft Nonprofits

Virtual Meeting Providers

Comparison of web conferencing software
Zoom
Webex

Collaborative Tools

Google Docs - Online Word Processor Included as Part of the Free, Web-Based Google Docs Editors Suite Offered by Google
Mentimeter - Interactive Presentations with Live Polls, Quizzes, Word Clouds, Q&As, & more
Poll Everywhere - Online Polling, Surveys, Q&As, Quizzes, Word Clouds, & more
Slido - Live Polls, Q&A, Quizzes, & Word Clouds
Padlet - Cloud-based, Real-time Collaborative Web Platform, Users can upload, organize, and share content to virtual bulletin boards called *padlets*