

How to conduct Hybrid Events: some key principles

A hybrid call is one that has a mix of participants in the same physical room, together with others who are remote [1].

Why are Hybrid Events inclusive?

Hybrid Events...

- Accommodate diverse needs and circumstances, ensuring that individuals, regardless of geographical location, personal constraints, or other logistical challenges, can actively participate in professional engagements [2].
- Level the playing field, allowing individuals with varying abilities, financial resources, or familial responsibilities to engage in meetings and talks on equal footing, offering the greatest flexibility to participants despite organizational challenges such as the additional set-up of online platforms for meetings and the personnel required to operate and monitor the platform during the event [3].
- Overcome many barriers routinely encountered by some of our members that are too often neglected (e.g. closed captioning provided via Zoom for the deaf and hard of hearing community, accessibility for individuals with physical impairments which prevent them from attending, screen reader compatibility for individuals with visual impairment) [4], [5].

How to make a Hybrid Event successful?

When scheduling the event/meeting...

- Define if this is a hybrid event, a full online event or a streamed event (e.g., Youtube) [6], and specify it in the invitation.
- Send the meeting invite with proper advance notice.
- Include a link to an agenda document in the invite.
- (optional) Provide slides and support videos in advance.



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Just before the event/meeting starts...

- Be 15-20 minutes in advance in the room to check the IT set-up.
- Check if people in the room (attending on-site) can:
 - see the slides
 - see the speaker
 - hear the microphones of the room
 - hear people talking on zoom
- Check if people online can:
 - can see the slides
 - can see the speaker
 - can hear the speaker
 - can talk
 - need closed captioning

During the event/meeting...

- Start on time to avoid disruption.
- Consider recording providing all speakers agreed to it prior to the talk (for external purpose, the nccr features online talks here and/or the talks could be added on Teams for internal purpose only)
- Give audio and video feedback. If you are unable to see or hear someone, let them know so they can address and correct.
- Be intentional about introductions (or not).
- Be intentional about who has mic/camera on...
- Provide verbal cues when referring to a document or an item on a slide.
- (optional) Document in real-time.

After the event/meeting...

- Capture action items (in the minutes or by email), and give them a deadline.
- (optional) Upload recording/slides.
- (optional) Save the chat (complimentary to the recording, e.g. references)
- (optional) Send survey for feedback / how to improve?

Resources

[1] All-Remote Meetings. The GitLab Handbook. <https://handbook.gitlab.com>



- [2] Medina LR, Shrum W. 2022. Going virtual: Academic conferences in the age of COVID-19. *First Monday*
- [3] Puccinelli E, Zeppilli D, Stefanoudis PV, Wittische-Helou A, Kermorgant M, Fuchs S, Menot L, Easton EE, Weber AA-T. 2022. Hybrid conferences: opportunities, challenges and ways forward. *Front. Mar. Sci.* 9:
- [4] Tao Y, Steckel D, Klemeš JJ, You F. 2021. Trend towards virtual and hybrid conferences may be an effective climate change mitigation strategy. *Nat. Commun.* 12(1):7324
- [5] Skiles M, Yang E, Reshef O, Muñoz DR, Cintron D, Lind ML, Rush A, Calleja PP, Nerenberg R, Armani A, Faust K, Kumar M. 2022. Conference demographics and footprint changed by virtual platforms. *Nat. Sustain.* 5(2):149–56
- [6] Delipalta A, Herterich P. 2021. Planning hybrid events. Zenodo