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Planning hybrid events

Digital Curation Centre

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Contents

Preface

This guide is aimed at those considering running a hybrid event and those who have been asked to organise a hybrid event. By 'hybrid event', we mean one that includes elements of in-person participation alongside remote participation in some form. The guide covers events requiring a high degree of participatory activities (such as workshops and group discussions) as well as less interaction between all participants (such as seminars and talks).

It aims to help you decide whether a hybrid format suits the type of event you intend to have and, if so, what technical and organisational elements you need to consider to make your event a success. Topics covered include:

- Categorising different types of hybrid events
- Guidance on how to assess your audience
- The planning stages of your hybrid event
- Suggestions to accommodate attendees in multiple time zones
- An examination of the variety of virtual event platforms available at the time of writing
- A specific use case

It is informed by the experiences of the authors in planning and participating in a wide variety of hybrid, in-person and virtual events and by the research and experiences of others who are acknowledged in the text.

1. Introduction

With organisers having adapted their events throughout the pandemic and many institutions' travel policies addressing climate change challenges and requiring less travel, virtual events and hybrid events will likely be the default.

Before starting to plan your hybrid event, you should consider if a hybrid option is the most suitable selection for your event. As this guide will highlight in more detail later, hybrid events come with their own set of challenges which are distinct from both fully virtual and fully in-person events; you should spend some time thinking about a cost benefit analysis for yourself and your attendees, and consider if a physical or virtual event might be the better option for your organisation and your audience. A first starting point to help you decide can be to draw up a list of events that you usually attend, and consider which of them you would still be willing to travel to (both from a financial and from a practical point of view), and where a virtual only option seems to be sufficient and fulfilling the purpose of the event without the need for physical attendance.[1]

We do not cover making events as accessible as possible in this guide as none of the authors are experts in this area. We strongly advise that you consider accessibility and inclusion for both the physical and the virtual aspects of your event, and we provide a list of resources that we found helpful at the end of this document.

A. Types of hybrid events

Hybrid events can take a variety of forms, depending on the goal you would like to achieve with your event, where your audience is based and so on. A hackathon team at the Software Sustainability Institute's Collaboration Workshop 2020 created an overview of types of hybrid events characterising them by interaction, synchronicity, and geographic distribution[2]; however, your own definition might be different.

Some common hybrid events that have been run regularly before the COVID pandemic include:

- Multi-site trainings on a single topic

- Conferences with online elements (such as the live streaming of talks, remote presenters, social interaction walls)

- Multi-site sprints ("hub and node") to address a joint challenge

This guide will present complimentary thoughts on events that to our knowledge have not been run in a hybrid setup but we have drawn on established resources where applicable.

B. Virtual vs physical experience: equal or different?

Providing an equal experience for all your attendees will be very hard, and, for some aspects, even impossible. You should aim at an equal experience where possible, but for some sessions (for example some networking opportunities), a hybrid solution will not be feasible without making it an awkward experience for some of the attendees. Focusing on a good in-person or virtual-only experience instead might be the better decision.

For example, the key to providing an equal experience may not lie in making every experience hybrid, but in ensuring there are plenty of valuable sessions and activities provided for both sets of attendees - even if they are held separately. Attempting to squeeze a social event like a drinks reception in a hybrid format may result in neglected remote and confused on-site attendees. Instead, you can plan two receptions - one taking place at your social venue, and one using your virtual events platform and online activities.

Whatever you decide to do, be clear in your communication about what attendees can expect to allow them to make an informed decision when deciding on their form of attendance. You might also want to consider how this reflects in the attendance fees that you offer - if several of your activities will require physical presence, this should be reflected in your online attendance fee.

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[1] Thanks to EOSC-Life for running this as an exercise with all attendees at their workshop on "Hosting hybrid events", https://www.eosc-life.eu/news/workshop-hosting-hybrid-events/
[2] Their overview can be found at https://github.com/softwaresaved/hybrid-event-guide/blob/master/typesofevent.md

C. Consider your audience

In addition to surveying your own preferences, it is really useful to understand the audience for your event and any challenges they might face in attending a physical, hybrid or virtual event. This will allow you to pick the most suitable option, and plan for an event that is accessible and will empower attendees to make the most of your event. One way to do this is to create personas for your audience members that will help you throughout the planning process.[3] This is especially useful if your audience is very diverse and their experiences and circumstances are different from your own.

A notable section of the world that should be taken into consideration in particular are those from low- and middle-income (LMIC) countries, mostly located in Africa, Asia and Latin America. As well as financial and time zone considerations such as those described later in this document, one should also note there are accessibility issues to keep in mind. For example, due to changing political relations in various regions of the world, some countries may be subject to sanctions which preclude the use of certain software, and especially those software that are based in the US, such as Zoom or Google. This will automatically exclude participation from any individuals from such countries. Internet bandwidth and stability may be taken for granted in high income countries, but are a challenge in LMICs. The same argument can also be applied to access to electricity. Therefore, the ability of participants from LMICs to engage in any meaningful way with a virtual element of a hybrid event may be compromised. Such considerations can be mitigated somewhat by recordings of the event but will still not replace the unique qualities of live participation in an event.

2. Event planning

Planning a hybrid event is a challenging, effort intensive and time consuming process, which is why, as discussed above, it is important to ensure that an assessment of the type of event, format suitability and cost-benefit analysis has taken place. There are a number of variables to

be considered such as size of your event, number of physical versus virtual attendees, whether your event is paid or free to attend, etc. One of the most common observations we have heard from colleagues who have planned a hybrid event – including our own experience – is that, in essence, a hybrid event involves the organisation of almost two separate events. It can be a very labour intensive and expensive endeavor, so it is important that you consider your requirements carefully at the budgeting stage and ensure that a hybrid event is resourced accordingly. You can alleviate part of the cost through a registration fee should you wish to do so.

A. Budgeting

You have conducted your initial analyses, and you now have clear goals and expectations for your event. These will form the basis of your budgeting exercise, and depending on the scale of your event the budget considerations will vary. Below are some common items to be considered:

- Physical venue costs (conference centre space and AV, any social activities and event locations like drinks reception and social dinner venues)
  - Bear in mind that you will need a lot of AV and technical equipment when planning your hybrid event. This is one of the most expensive aspects of an event, so it is crucial that you account for all the additional technology that will be needed in order to create a uniform and streamlined hybrid experience for all your attendees.
- Virtual platform costs (it may be provided to you by your conference venue, or you may procure a bespoke solution tailored to your event. Further thoughts on selecting a suitable platform are provided in section 4.)
- Staff effort and resourcing

  - For many organisations, staff time and expertise is the most valuable asset. Consider how many staff members you need to run your event, and ensure the cost of their time is factored in.

We made an example of a large scale hybrid event budget available for reference.[4] You will

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[3] A good starting point for creating your personas can be found in the Turing Way handbook at
https://the-turing-way.netlify.app/project-design/persona/persona-creation.html
[4] Digital Curation Centre. (2021). Dummy hybrid event budget. Zenodo. https://doi.org/10.5281/zenodo.5541511

notice that an important factor in this budget sheet is the expected attendee numbers and the split between attendees on-site and those joining you virtually. Inevitably, you will need to base your assumption on estimates or perhaps data from previous or similar events.

It is worth having a plan B in place for your hybrid event, including various contingencies[5] for sudden cancellation, postponement, shift to virtual only, as well as the relevant insurance coverage. Discuss with your event venue where appropriate, and ensure your legal team is involved in every step of the contract process.

B.   Charging for your event

Since the shift to virtual events due to the COVID-19 pandemic, a common debate is whether charging for virtual events is justified, as there is a misconception that event costs are only related to conference venue related expenses. Given the large virtual component in hybrid events, this will be a hot topic for some time.

As mentioned above, depending on your institution and type of event, staff costs may be one of the core components of your event's budget. Virtual events still require effort to plan, organise and run, so even with no technological enhancements, effort to organise an event is a cost that remains present in a virtual environment. Hybrid events require twice the size of a regular event team - considering there are events taking place online, on-site, simultaneously, on various time zones and platforms, etc - so hybrid event staff costs are even higher. Adding in any costs for virtual event platforms and technology requirements - from solutions like Zoom or gather.town to bespoke platforms, studios, (post-)production and editing, etc. - you will see that even a virtual event can become an expensive adventure. Anticipating your expenses as much as possible (see section 2 A on budgeting), and ensuring you set your event fees to a level that covers most if not all of your costs is vital.

If you do normally charge for your event, and you still invest resources in planning a hybrid or virtual event, then there is no reason why you should stop. Several organisations have charged fees for their virtual events and published their reasoning and justification for doing so, providing transparency for the costs involved in running such events.[6]

Finally, to keep your event accessible, consider budgeting so you can offer free places or other support for attendees that cannot afford paying the fee.[7]

3.   Accommodating multiple time zones

Most likely, your hybrid event is still scheduled around times compatible with your physical venue or organising host time zone. This excludes certain parts of the world from active remote participation as adjusting one's lifestyle to a different time zone for a short period of time while other commitments continue can be more difficult than travelling to a different time zone physically. Some ideas to make a hybrid event more accessible across several time zones to consider:

● Scheduling virtual social drop-ins, chats, Q&A sessions the week after at times that are more convenient for the part of the world excluded from convenient "live attendance."[8]

● Encouraging satellite meetings in parts of the world excluded from convenient "live attendance" (e.g. regional events organised by RDA in Australia); these could also host local speakers and encourage talks and discussions in languages other than English.

● Dedicating certain time slots (e.g afternoons in GMT, which will be acceptable times for certain parts of the US, Asia, parts of Australia) to virtual sessions. At these times, meeting rooms in the venue can be converted into 'desk spaces' for physical attendees to use their laptops to join the virtual sessions.

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[5] Digital Curation Centre. (2021). Hybrid event - example risk register. Zenodo. https://doi.org/10.5281/zenodo.5532527
[6]Examples include EMBL https://blogs.embl.org/events/2021/02/15/why-do-we-charge-fees-for-virtual-events/ and the Research Data Alliance
https://www.rd-alliance.org/rdas-17th-plenary-meeting-rda-organisational-assembly-support-statement-rda-plenary-hybrid-virtual
[7] This resource by the World Bank is a good starting point to help you calculate adequate fees for other countries:
https://blogs.worldbank.org/opendata/new-results-international-comparison-program-shed-light-size-global-economy
[8] For example, during VP17, the RDA Secretariat held RDA Q&As daily at different times to accommodate as many time zones around the globe as possible.

- Design parts of the event or specific days to be virtual only.

- Record as many sessions as possible, and ensure they are available on demand.

- Have repeat sessions at different times depending on the type of activity.

Providing additional offers will require more staff resources, so make sure you plan for this accordingly. You might want to consider finding partners that are located in different time zones and can support the delivery of some sessions at times that are more convenient to them. In that case, make sure you offer them training and briefing sessions ahead of the event to ensure what is expected of them to ensure a consistent attendee experience across the board.

In some respects, the time zone issue is not a new development brought on by the need for virtual or hybrid events. Events held in Europe and the US have always been a considerable way away from colleagues in Australia and Asia, making them significantly harder (and in the case of in-person meetings probably more expensive) to attend. It is impossible to completely resolve time zone issues. Your audience may choose to physically travel to your time zone, adjust to it remotely or rely on you to provide solutions. However, the new reality for virtual and hybrid events does give room for solutions to enable as much and as wide participation as possible, as outlined above.

4. Platforms and selecting the right tool

There are multiple virtual event tools available (as simple as Zoom, and as elaborate as you need them to be), and most of them are now expanding to include hybrid event applications. Certain conference venues have also had to evolve during the COVID-19 pandemic because of event restrictions by developing their own virtual or hybrid technology.

An important thing to keep in mind is that most of these platforms - and your relevant venue

set-up - come with a significant price tag. If your event is small, or the format allows for it, you may be able to deliver using less complicated solutions - like Zoom, GoToWebinar/GoToMeeting or Microsoft Teams. You will likely still need increased AV and manpower on-site for recording and broadcasting - speak to your venue to come up with an appropriate plan.

You have assessed your needs and your audience, and you are now certain that you need a bespoke platform to deliver. Generally, you will find three broad categories of solutions:

1. Video conferencing tools (e.g., Zoom, Microsoft Teams, GoToMeeting, etc.)

2. Wrappers for video conferencing tools (e.g. Hopin, Whova) that provide scheduling and messaging options around established video conferencing tools

3. Integrated solutions that may provide browser-based conferencing options or incorporate a video calling platform (or YouTube and Vimeo if your content is live streamed or on-demand or pre-recorded) into a all-in-one solution for your session scheduling, poster exhibition, sponsor promotion, attendee lists, etc (e.g. Cvent Attendee Hub)

There are multiple options, and many of these solutions are very similar. RDA Secretariat colleagues put together a matrix outlining numerous virtual solutions (with hybrid aspects), later expanded by the RDA VP17 organising committee. This matrix, used to procure a virtual events platform for RDA VP16 and VP17, is provided here for your information[9] - with thanks to RDA colleagues granting us permission to share it. You will notice that the RDA committees compiled a list of criteria for the specific events in question, ranked based on importance; each platform was then assessed against these criteria. Defining your specific event requirements is a crucial first step before any further decisions are made.

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5. Use case: Planning for hybrid RDA P17

The following section will outline our planning notes for a hybrid RDA P17. We cover different scenarios for each type of plenary session in detail, along with their technical, physical, virtual and staffing considerations.

All session chairs, speakers and moderators should be offered training and guidance ahead of the event to ensure they understand their own roles and the support provided to them.

Plenary session

Hybrid opening or keynote: Speaker physically present

Scenario: A plenary session where the speakers are on-site, and the audience is a mix of physical and virtual attendees. For the purpose of this scenario, we assume 300 attendees on-site, 600 attending virtually via the virtual events platform or YouTube streaming.

The main plenary room has a capacity of over 1000. Social distancing will be implemented comfortably.

Technical Requirements for Presentation	Technical Requirements for Remote Participation	Support/moderation staffing requirements
✓ On-site professional cameras, professional recording of speakers ✓ Dedicated technicians covering streaming and video editing ✓ Recorded talks will be available to RDA website/virtual event platform within the day	✓ Remote attendees will watch the talk on YouTube or virtual platform ✓ Dedicated technicians covering streaming and video editing ✓ Recorded talks will be available to RDA website/virtual event platform within the day ✓ To ensure equal opportunity for questions, Q&A will only be carried out via an app or sli.do. No questions will be taken on site ✓ Ability to project virtual events platform/attendee camera roll, and therefore those attending virtually through an additional screen/projector in the room, to enhance the hybrid feeling	✓ On-site venue technicians covering technical aspect ✓ OC/PC/RDA volunteers moderating the virtual 'room' and addressing technical concerns ✓ Experienced moderator on-site, coordinating Q&A via the app, frequently engaging and acknowledging the remote audience, running housekeeping at the start of each session to ensure what is in the room transfers seamlessly to the virtual platform

Example run of session:

- On site moderator welcomes everyone to the event, and checks that everything happening on site can be seen and heard by virtual attendees
- On site moderator introduces the format of the event and explains Q&A via app/sli.do
- On site moderator runs an example sli.do/app Q&A asking all attendees to indicate where they are joining from. The results are projected in the room.
- First speaker presents
- Sli.do questions come through
- Speaker/moderator address selected questions
- Recording becomes available for those on different time zones

Plenary session

Hybrid opening or keynote: Remote speaker

Scenario: A plenary session where the speaker(s) are presenting remotely exclusively, or are a mix of on-site and virtual presenters. The audience is a mix of physical and virtual attendees. For the purpose of this scenario, we assume 300 attendees on-site, 600 attending virtually via the virtual events platform or YouTube streaming.

The main plenary room has a capacity of over 1000. Social distancing will be implemented comfortably.

Technical Requirements for Presentation	Technical Requirements for Remote Participation	Support/moderation staffing requirements
✓ On-site professional cameras, professional recording of on-site speakers ✓ Dedicated technicians covering streaming and video editing of on-site speakers ✓ Recorded talks will be available to RDA website/virtual event platform within the day ✓ Virtual presenters will be projected on the main screen ✓ Virtual 'speaker prep' room will be available via the virtual platform for the remote speakers	✓ Remote attendees will watch the talk on YouTube or virtual platform ✓ Dedicated technicians covering streaming and video editing on-site ✓ Recorded talks will be available to RDA website/virtual event platform within the day ✓ To ensure equal opportunity for questions, Q&A will only be carried out via an app or sli.do. Questions will be projected on screen. A moderator will then facilitate these questions as normal ✓ Ability to project virtual events platform, and therefore those attending virtually (ie camera roll) through an additional screen/projector in the room, to enhance the hybrid feeling ✓ Option for pre-recorded remote keynote presentation. It is not ideal to pre-record as a whole, but parts of the talk can be pre-recorded, with live Q&A	✓ On-site venue technicians covering technical aspect for on-site presenters ✓ OC/PC/RDA volunteers moderating the virtual 'room' and addressing attendee technical concerns ✓ OC/PC/RDA volunteers moderating the virtual 'speaker prep room' and addressing speaker technical concerns, preparing screen sharing, slideshow etc ✓ Experienced moderator on-site, coordinating Q&A via the app, frequently engaging and acknowledging the remote audience, running housekeeping at the start of each session to ensure what is in the room transfers seamlessly to the virtual platform

Example run of session:

- On site moderator welcomes everyone to the event, and checks that everything happening on site can be seen and heard by virtual attendees
- On site moderator introduces the format of the event and explains Q&A via app/sli.do
- On site moderator runs an example sli.do/app Q&A asking all attendees to indicate where they are joining from. The results are projected in the room.
- First speaker presents remotely, is projected on screen and recorded through a virtual platform. Virtual attendees watch on platform/YouTube; on site attendees watch through projection
- Sli.do questions come through
- Speaker/moderator address selected questions
- Second speaker presents on-site, is streamed live via virtual event platform/YouTube. Virtual attendees watch stream on platform/YouTube; on site attendees attend as normal.
- Sli.do questions come through
- Speaker/moderator address selected questions
- Recording is edited to combine both speakers and becomes available for those on different time zones

Plenary session

Hybrid opening or keynote: Remote speaker

Scenario: A plenary session where the speaker(s) are presenting remotely exclusively, or are a mix of on-site and virtual presenters. The audience is a mix of physical and virtual attendees. For the purpose of this scenario, we assume 300 attendees on-site, 600 attending virtually via the virtual events platform or YouTube streaming.

The main plenary room has a capacity of over 1000. Social distancing will be implemented comfortably.

Technical Requirements for Presentation	Technical Requirements for Remote Participation	Support/moderation staffing requirements
✓ On-site professional cameras, professional recording of on-site speakers	✓ Remote attendees will watch the talk on YouTube or virtual platform	✓ On-site venue technicians covering technical aspect for on-site presenters
✓ Dedicated technicians covering streaming and video editing of on-site speakers	✓ Dedicated technicians covering streaming and video editing on-site	✓ OC/PC/RDA volunteers moderating the virtual 'room' and addressing attendee technical concerns
✓ Recorded talks will be available to RDA website/virtual event platform within the day	✓ Recorded talks will be available to RDA website/virtual event platform within the day	✓ OC/PC/RDA volunteers moderating the virtual 'speaker prep room' and addressing speaker technical concerns, preparing screen sharing, slideshow etc
✓ Virtual presenters will be projected on the main screen	✓ To ensure equal opportunity for questions, Q&A will only be carried out via an app or sli.do. Questions will be projected on screen. A moderator will then facilitate these questions as normal.	✓ Experienced moderator on-site, coordinating Q&A via the app, frequently engaging and acknowledging the remote audience, running housekeeping at the start of each session to ensure what is in the room transfers seamlessly to the virtual platform.
✓ Virtual 'speaker prep' room will be available via the virtual platform for the remote speakers	✓ Ability to project virtual events platform, and therefore those attending virtually (ie camera roll) through an additional screen/projector in the room, to enhance the hybrid feeling.	
	✓ Option for pre-recorded remote keynote presentation. It is not ideal to pre-record as a whole, but parts of the talk can be pre-recorded, with live Q&A.	

Example run of session:

- On site moderator welcomes everyone to the event, and checks that everything happening on site can be seen and heard by virtual attendees
- On site moderator introduces the format of the event and explains Q&A via app/sli.do
- On site moderator runs an example sli.do/app Q&A asking all attendees to indicate where they are joining from. The results are projected in the room.
- First speaker presents remotely, is projected on screen and recorded through a virtual platform. Virtual attendees watch on platform/YouTube; on site attendees watch through projection
- Sli.do questions come through
- Speaker/moderator address selected questions
- Second speaker presents on-site, is streamed live via virtual event platform/YouTube. Virtual attendees watch stream on platform/YouTube; on site attendees attend as normal.
- Sli.do questions come through
- Speaker/moderator address selected questions
- Recording is edited to combine both speakers and becomes available for those on different time zones

Group meetings

Hybrid group meeting: Chair physically present

Scenario: Group meetings are largely run by chairs. Our role is to ensure a smooth experience for both remote and on-site attendees. This scenario assumes a group session where 1) the chair is physically present 2) 50 attendees are on-site 3) a maximum of 150 attend virtually.

Technical Requirements for Presentation	Technical Requirements for Remote Participation	Support/moderation staffing requirements
✓ On-site professional cameras, recording of on-site presentation ✓ On-site Presentation will be streaming to virtual platform ✓ Dedicated technicians covering streaming and video editing of on-site speakers ✓ Recorded talks will be available to RDA website/virtual event platform within the day	✓ Remote attendees will watch the talk on a virtual platform. The talk will be streamed on a virtual platform/YouTube using the professional cameras. ✓ Dedicated technicians covering streaming and video editing on-site ✓ Recorded talks will be available to RDA website/virtual event platform within the day ✓ To ensure equal opportunity for questions, Q&A will only be carried out via an app or sli.do. Questions will be projected on screen. A moderator will then facilitate these questions as normal. ✓ Ability to project virtual events platform, and therefore those attending virtually (ie camera roll) through an additional screen/projector in the room, to enhance the hybrid feeling.	✓ On-site venue technicians covering technical aspect for on-site presenters ✓ OC/PC/RDA volunteers moderating the virtual 'room' and addressing attendee technical concerns ✓ Experienced moderator on-site, coordinating Q&A via the app, frequently engaging and acknowledging the remote audience, running housekeeping at the start of each session to ensure what is in the room transfers seamlessly to the virtual platform.

Example run of session:

- On site chair welcomes everyone to the event, and checks that everything happening on site can be seen and heard by virtual attendees
- On site chair introduces the format of the event and explains Q&A via app/sli.do
- On site moderator runs an example sli.do/app Q&A asking all attendees to indicate where they are joining from. The results are projected in the room.
- speakers present on-site, presentation is streamed live via virtual event platform/YouTube
- Sli.do questions come through
- Speaker/moderator address selected questions

* If the session is a BoF/interactive, the moderator will facilitate as if all attendees are in the room, as the rooms will be fully equipped to project virtual attendees image and audio.

Group meetings

Hybrid group meeting: Chair(s) presenting remotely or a mix of on-site and remote presentations

Scenario: This scenario assumes a group session where 1) the chair is presenting remotely 2) up to 50 attendees are on-site 3) a maximum of 150 attend virtually.

Technical Requirements for Presentation	Technical Requirements for Remote Participation	Support/moderation staffing requirements
✓ On-site professional cameras available, pointing at audience (optional) ✓ Dedicated technicians in the room ✓ Virtual presentation is recorded via the platform. Recorded talks will be available to RDA website/virtual event platform within the day ✓ Virtual 'speaker prep' room will be available via the virtual platform for the remote speakers	✓ Remote attendees will watch the talk on virtual platform ✓ Dedicated technicians covering streaming and video editing on-site ✓ Recorded talks will be available to RDA website/virtual event platform within the day ✓ To ensure equal opportunity for questions, Q&A will only be carried out via an app or sli.do. Questions will be projected on screen. A moderator will then facilitate these questions as normal ✓ Ability to project virtual events platform, and therefore those attending virtually (ie camera roll) through an additional screen/projector in the room, to enhance the hybrid feeling	✓ On-site venue technicians covering technical aspect for on-site aspect ✓ OC/PC/RDA volunteers moderating the virtual 'room' and addressing attendee technical concerns ✓ OC/PC/RDA volunteers moderating the virtual 'speaker prep room' and addressing speaker technical concerns ✓ Experienced moderator on-site, coordinating Q&A via the app, frequently engaging and acknowledging the remote audience, running housekeeping at the start of each session to ensure what is in the room transfers seamlessly to the virtual platform ✓ Part of the guidance provided to chairs will be a requirement that fall back plans are in place in case of last minute inability to attend

Example run of session:

- On site moderator introduces hybrid format, remote speaker and on-site audience. On site camera is pointing at the audience and moderator (optional).
- Remote Chair is projected on screen, welcomes everyone to the event, and checks that everything happening on site can be seen and heard by all attendees
- On site chair introduces the format of the event and explains Q&A via app/sli.do
- On site moderator runs an example sli.do/app Q&A asking all attendees to indicate where they are joining from. The results are projected in the room.
- speakers present remotely as if it is a virtual meeting. The main difference is that this virtual meeting is projected on screen, and the remote attendees can also see the stream coming from within the physical room.
- Sli.do questions come through
- Speaker/moderator address selected questions

* If the session is a BoF/interactive, the moderator will facilitate as if all attendees are in the room, as the rooms will be fully equipped to project virtual attendees image and audio.

Unconference

Hybrid unconference

A hybrid unconference, jointly run by IDCC staff and RDA was run at the RDA's 17th plenary.

The physical venue made 13 suites available, of varying sizes, to accomodate a number of hybrid parallel sessions.

✓ Hybrid Opening Session, live streamed, similar format to plenary sessions.

✓ All participants use mentimeter to vote.

✓ All sessions are run as hybrid sessions, with all available technical equipment as outlined in sections above.

✓ Where the main speaker/session lead is physically present, the session is ran as described in the section "Hybrid group meeting: Chair physically present"

✓ Where the main speaker/session lead is remote, the session is ran as described in the section "Hybrid group meeting: Chair(s) presenting remotely or a mix of on-site and remote presentations"

✓ Hybrid Closing Session, live streamed with report-back, similar format to plenary sessions.

✓ Extra time will be factored in for dealing with the hybrid transitions.

Hybrid social events

Social events are another aspect that may require two separate streams; a virtual and a physical, with some scope for integration of virtual participation across the board.

At present, a museum is booked for a social dinner, with the initial expectation of a ceilidh aspect. Budget permitting, a virtual speaker could be introduced during the welcome section of the social dinner, and a streaming service to enable virtual tuning into the celebrations. This could be promoted as a sponsorship package.

Separate virtual coffee breaks, quiz evenings and drinks receptions can be organised to provide virtual attendees with a networking space.

Similar to virtual only events, networking and socials should be part of the programme while still allowing breaks that give virtual attendees time away from their computers and allow physical attendees to take advantage of less structured networking opportunities at the venue.

Hybrid poster exhibition & Sponsor exhibition

The poster exhibition can be run as mainly a virtual event, with those available on-site having a physical poster in the exhibition area to enable a 1:1 interaction where possible.

The technology that will be selected to facilitate the virtual aspect will provide a 'virtual trade show' type facility, where each poster presenter will have a dedicated area with their poster presentation and a video presentation if they wish. It will be anticipated that the main area of interaction is online, and all presenters will be required to have a virtual poster even if they are present on-site. This way, virtual attendees will be able to approach them, discuss their work and instant message them through the virtual platform.

An additional feature to ensure a hybrid experience would be a virtual presentation/screen in the poster exhibition area, with a rolling display of virtual posters along with the virtual presenters' contact details.

Poster voting will be carried out using a Google Form (or an equivalent if the virtual platform selected provides such a feature).

Similarly to the poster exhibition, sponsors can opt to have a physical exhibition stall on-site, a virtual 'trade show' area on the virtual platform, or both.

Final remarks

So far, practical experiences with hybrid events still seem to be limited and we are looking forward to more use cases and lessons learned going forward. Our planned hybrid event had to be moved to a virtual plenary, however, we hope that our planning is still useful to others who are just starting out in planning their hybrid events.

Quick guide

- Define the scope of your event
  - Should it be virtual, in-person, or hybrid
  - How big will it be
  - What types of sessions will it cover
- Understand your audience
  - Create personas for your attendees
    - A good starting point for creating your personas can be found in the Turing Way handbook at https://the-turing-way.netlify.app/project-design/persona/persona-creation.html
  - Identify any barriers they might face and take them into account for any further planning
- Budget
  - Use the hybrid event budget template for budget for your event: https://doi.org/10.5281/zenodo.5541511
- Select your tools and venue
- Define staff roles and responsibilities
- Brief and train your speakers, chairs and staff
- Ensure you collect feedback from your attendees

Resources and further reading

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About the authors

Alexandra Delipalta was the main organiser for the RDA Plenary 17*; Patricia Herterich was a key member of both the organising committee and the programme committee for the event.

It is important to note that despite our extensive planning for a hybrid Plenary 17, this version of the event did not materialise; due to the COVID-19 restrictions in place in the UK in April 2021, the event ran as a virtual-only Plenary. Our notes presented in this guide provide our thinking and planning process based on our extensive experience running both physical and virtual-only events of varying scales - combined to anticipate requirements and challenges for a hybrid event. We do however plan to run our events in a hybrid format going forward and once it is safe for the community, at which point this guide will be updated with our experience and tips and tricks for delivering a successful hybrid event.

* The DCC alongside UKRI and Jisc hosted RDA's 17th Plenary Meeting in April 2021:
https://www.rd-alliance.org/plenaries/rda-17th-plenary-meeting-edinburgh-virtual

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