Research Data Alliance Hybridisation of Plenaries

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This document outlines detailed processes to assist you with planning hybrid events. The document includes reflections and definitions of what a hybrid event looks like and what to expect during the planning preparation. It will cover online and in-person arrangements elements.

Each planning step used in this document is based on the RDA's 19th and 20th Plenary meetings examples. Both plenary meetings were scheduled and run as hybrid events. Hybrid events are events where some speakers are physically present at the venue and some online, remotely. The same scenario applies to attendees; there is a mix of onsite audience and remote, watching a live stream online. But the whole audience can interact with each other using networking and messaging tools via an online platform.

Each of the planning steps in this document will walk you through the following:

1. Timeline
2. Resourcing required in planning hybrid event
3. Online technical requirements (Zoom)
4. On-site audio-visual equipment requirements
5. Event management platform (Whova [Hu:va])
6. Speakers presentation materials
7. Test arrangements for speakers
8. Resourcing and further reading

Co-created with RDA members involved in the planning of the past two plenary meetings, the document should give an overview on what is required to organise a smooth and successful hybrid event.

Introduction

By hybrid events we mean a mixture of in-person and remote (online) sessions. Some participants physically attend the event. Others watch a live stream online from the comfort of their own homes or offices.

Hybrid event planning is not simply arranging to live stream the in-person event to an online audience. It is all about coming up with one event experience that engages two different audiences together while getting them to interact with one another.

Many businesses consider hybrid events being the ideal format for the future, compared to exclusively in-person or virtual-only events. But combining both elements of the events into one (hybrid) has its own complexity. There are many challenges on the way and you should consider three main criterias when thinking of planning a hybrid event:

1. **Increased planning time & complexity.** You will be planning two events (online and in-person) in one. That will require additional time and learning.
2. **Increased cost for organisers**. A physical venue hire and purchasing a hybrid event platform will add extra cost.
3. **Additional resourcing.** One person won't physically manage overseeing planning of two elements of the event, building a hybrid event platform and managing equipment onsite. You will require support staff.

To host a successful hybrid event, you have to bring together in-person and virtual event technology, and merge aspects of in-person and virtual event planning.

We listed all plenary hybrid planning steps that each event planner should familiarise themself if they consider planning a hybrid event.

1. Timeline

Starting looking for an event online platform, physical venue and identifying registration options well ahead of your start day of the event will provide a smooth planning process. Bear in mind that selecting a tool for your event is half of the planning. Familiarising yourself, building it, learning new commands will take a lot of time. Sometimes you will spend a day going back and forth with a selected platform's support team to get an answer to your query. An event timeline example can be viewed below.

Starting Time	Description	Comments
9-12 months prior	Identify event's venue	
4-5 months prior	Identify & select hybrid event platform	Ideally select the registration and event's platform at the same time
	Identify & select registration platform	
4-5 months prior	Recruiting onsite technicians	
3 months prior	Building event platform	
3 months prior	Collecting event's materials	Speakers & sponsors profiles, posters, etc.
3 months prior	Recruiting support staff to manage platform and onsite sessions	
2,5-2 months prior	Uploading event's materials and synching registration list	These are regular (if not daily) time consuming tasks
2,5-2 months prior	Purchasing Zoom accounts and setting up Zoom rooms	
2 months prior	Production of the platform's guidance to speakers, attendees	
2 months prior	Production of staff platform training materials	
2-1 weeks prior	Staff training on online platforms	
3-2 weeks prior	Testing platform, Zoom	Always test Zoom rooms and platform streaming

2. Roles and responsibilities in a Hybrid set up

In terms of resourcing, a hybrid Plenary requires more effort compared to a fully virtual or physical event. To ensure its success, roles and responsibilities have to be clearly defined from the beginning of the planning stage using documents such as a run of show that will list all detailed tasks needed before and during the Plenary, timeline, and responsible person.

For an example of a run of show, please see [RDA P20 run of show.xlsx]().

2.1 Volunteers

RDA Plenaries are characterised for having breakout sessions which are blocks of parallel 90-minute sessions organised by different groups. As these sessions happen simultaneously, the volunteers' role is key.

Volunteers are usually students/employees from the local organiser who in return get a free registration (subject to discussion for each Plenary) and free meals on site during their 'working hours'. Their main task is to guide the breakout session onsite hosts/chairs to successfully open the Zoom call links for online audience, test that onsite equipment such as screen, projector and sound works and that the hosts are comfortable with Zoom functions like screen sharing, video recording, and others. The total number of volunteers will depend on the number of simultaneous breakout sessions in a day but at least one volunteer per session should be assigned.

For a detailed description of the Volunteers responsibilities please see the example of RDA P20 Volunteer Guidance.doc.

While volunteers are not in charge of setting up or configuring the Zoom rooms for the breakout sessions, they need to have access to the Zoom meeting links that the Technical plenary coordinator has created. The document with a Zoom rooms access can be downloaded in the laptop of each breakout session for easy access or alternatively a small label with the zoom passwords and login email can be printed and put in each laptop.

Consider the following tasks when dealing with volunteers:

- Define volunteers available
- Allocate volunteers to each session
- Develop or update the Volunteer guidance document and Zoom training document
- Preliminar online/onsite training session and walk through Volunteer Guidance and a Zoom training
- Arrange a meeting with volunteers during the event day to check any outstanding doubts
- Define a communication channel that volunteers can use on the event day to quickly alert of any issues. During the last RDA P20 we used Slack but not everyone had the app installed on their phones.

2.2 Technical team

The support of technicians on site is crucial for the success of a hybrid event as they will address any issues that may arise on the day of the event.

The venue can have their own technicians or work with an external company. The amount of technicians required is variable but it is recommended to have at minimum one technician responsible for one session. During the latest RDA P20 we had two full time technicians present at all Plenary sessions and one technician that rotated between all Breakout sessions.

The general responsibilities of the technicians include the following:

- Ensure the correct setup of AV equipment like camera, projector, screen and room laptop to guarantee that the presentations, audio and video are shown to onsite attendees and virtual attendees on the Zoom webinar or Zoom meeting.

If a technician is supporting a Plenary session (main session):

- Manage microphone and headset connection for speakers at Plenary sessions.
- Test the connection of camera, projector and audio to accommodate remote speakers in advance of their session.
- During a plenary session the technician will control the room laptop, this implies that they will be in charge of accessing the online folder with materials of presentations uploaded by the session chairs and present them during the sessions. In between sessions they also need to show any holding slides if available.
- The technician will start the Zoom webinar from the main laptop and assign a) co-hosts as needed to support him monitor the zoom chat for the Q&A of each session and b) panellists role for remote speakers.

If a technician is supporting the Breakout sessions (parallel sessions):

- The technician will review room by room if there are any issues with the AV equipment that neither the volunteers nor the session chairs can solve.

It is necessary to communicate with the technicians in advance to clarify any potential doubts they may have. For RDA P20 we held a meeting with the technical team, the event coordination team and the venue several weeks before the event to align everyone regarding

- Number of technicians to be present, in which room and their contact details
- Reconfirm AV equipment and any last minute requests
- Make sure technicians had access to Zoom links and would be invited as co-hosts
- Coordinate test for audio or connection for remote speakers
- Clarify responsibilities
- Requirements of programmes/software needed for the laptops, in our case all the laptops had Zoom already installed and would have the guidance documents for volunteers with zoom links and passwords saved in advance.

2.3 Digital events coordinator

A digital event coordinator was hired on a temporary basis for the first time to help facilitate the event platform Whova during the Plenary 20. As a part-timer, for 9 weeks the event coordinator was involved in:

- Building the event platform Whova by uploading new registrants, updating speakers' profiles, uploading agenda and zoom links, sending announcements, communicating with sponsors regarding their Whova pages, opening social activities, monitoring chats and communicating with attendees
- Monitoring the help desk and queries sent by email to the Secretariat email
- Supporting sessions and solving any technical issues remotely

2.4 Technical Plenary coordinator

The technical plenary coordinator is responsible for providing a Zoom meeting room for each breakout session as well as a Zoom webinar room for any Plenary Sessions. He/she will also need to make sure the rooms are all openable by volunteers or staff to support chairs on the day.

This is broken up into the following steps:

- Setting up the Zoom licences with dummy gmail accounts
- Setting up each individual meeting room to specifications
- Setting up the Webinar room to specifications
- Adding the links to each of the rooms to a tab on the Master Schedule Excel document for volunteers and staff (we use a template from previous Plenaries).

Section 3 describes in detail the zoom infrastructure and configuration that the Technical plenary coordinator should follow.

2.5 Event organiser team

The event organisers are in charge of the planning and logistic side of the conference. In a hybrid plenary this translates to serving as a link between the roles mentioned above. Consider the following scenarios:

- Support the technicians during the Plenary sessions to a) identify all speakers and panellists onsite and remotely b) update them with any programme last minute changes b) act as co-hosts to monitor the Zoom chat during the Q&A session.
- Reach out onsite and online speakers to organise tests for connection, audio, etc with the technical team. This step is described in detail in point 7.
- Lead the volunteers during breakout sessions, support them with any outstanding doubts and involve the technicians if a particular session has any technical problems.

- Monitor that all the zoom rooms and links have been created by the Technical coordinator and assigned to each session. Ensure that both volunteers and technicians have access to them.

3. Zoom infrastructure and configuration

3.1. Zoom set-up overview

The virtual component of the RDA Plenaries is set up using a set of Zoom rooms. Breakout sessions take place in a Zoom “Meeting” room type and Plenary sessions in a “Webinar” room type.

This is done with a set of zoom licences on the RDA Secretariat Zoom account. One licence is needed for each concurrent Breakout Session. The licences are assigned to dummy gmail accounts set up for the use of hosting the sessions so that the login information can be shared with volunteers.

Each of these licensed gmail accounts sets up one recurring Breakout Session Meeting to be used multiple times throughout the event (a “room” either real or virtual) while one account is chosen to also host the Plenary sessions. This chosen account is given a Zoom Webinar licence in addition to the standard Zoom one so that it can create both a recurring Meeting and Webinar.

All Secretariat licensed accounts are set as host on each room, Meetings and Webinar, so that any volunteer logged into any of the RDA Secretariat licensed accounts can join as host/co-host in any breakout room or Plenary session.

Once the Meetings and Webinar are created, links to these rooms are generated and added to the Whova platform for registered attendees to access.

3.2. Zoom configuration

The configuration of the Zoom Meeting rooms used to hold Breakout Sessions are set up with the following goals in mind:

- Attendees can enter a Meeting room without a host. The idea is to set up a room that anyone can enter at any time so that attendees DO NOT have to be let into the room by a host/co-host. This is done by including the password to join the meeting in the link posted to Whova.
- Any volunteer logged into any of the RDA Secretariat dummy accounts is a host/co-host of ALL meeting rooms upon entry.
- Ensure recordings of the sessions go to the RDA Secretariat cloud and NOT to any local computers being used to run zoom at the event.
- Make sure participants can talk with each other through Zoom chat.

The configuration for the Zoom Webinar room used for the Plenary Sessions is set up with the following goals in mind:

- Attendees can join the waiting room without approval from a host.
- Anyone logged in with any of the RDA Secretariat dummy accounts is a host/co-host upon entry.
- Plenary sessions are configured to use Zoom Webinar regarding chat.
- Ensure recordings of the sessions go to the RDA Secretariat cloud and NOT to any local computers being used to run zoom at the event.
- A Practice session is set up so that a host (a volunteer logged in with a RDA Secretariat zoom account) can start the pre-session to do any technical checks with remote presenters before the Webinar goes live.
- Remote panellists are able to join the pre-session for a technical check via a Zoom generated invite before the host begins the actual stream of the Webinar.

4. Event management platform

To create a successful hybrid event, you need to know how to set up an in-person and a virtual event and create an equal balance between them. To help you in that task, a hybrid event platform is the way to go. The market is overwhelmed with hybrid platforms but how to make the right choice? To help you select the hybrid event platform, it is important to think about the capabilities and features that you require for your event.

Engagement between two parts of your event is what you need to focus on and to achieve that, the hybrid event platform should include the following minimum requirements:

- Simple to use (for both - organisers and attendees)
- Live broadcasting
- Downloadable recorded content
- Networking features
- Virtual booths for exhibitors/sponsors
- Interactive capabilities
- Analytics

The RDA Plenary uses all-in-one event management platform Whova [hu:va] to run Plenaries. The platform is accessible to onsite and online attendees, is set to exchange messages, check on social events, and mainly, to stream sessions from onsite to online audience. Streaming is done via connecting Whova with Zoom rooms.

Once the financial formalities are set (paid and contract is signed), Whova's technical support team will be creating your dashboard. It normally takes a couple of working days and once complete, you will receive access to the platform. You will be able to ask any support questions you may have about the system's setup, disable some functionalities, etc.

Whova will have two dashboards, one for organisers ('administrator's view') where you have access to the platform's background and you build and control your event. Another dashboard is for attendees who will only see a ‘finished’ side of the platform. Administrators can check how a part of the menu looks by simply switching in between two dashboards within one click. All changes are constantly saved and easy to change.

Whova needs to be built by organisers by filling out a simple menu such as agenda, speakers, attendees, sponsors, etc. We recommend starting doing it no later than 10 weeks prior to the Plenary.

Whova has a detailed list of training materials both for organisers and attendees to use. However each event requires its unique, personal settings and plenaries are not the exception.

Please use Whova’s templates to upload registrants, speakers, programmes, posters, etc. These can be found on Whova’s dashboard, once the platform is purchased and you have access.

Every event platform is unique and you will need to learn functionalities and tricks. Below you will find a list of general recommendations:

a. Zoom and an event platform will normally have two chats. To avoid duplications, please disable one or another.
b. Uploading agenda templates: once downloaded & filled out, please leave a column where a live streaming URL needs to be entered empty. We recommend adding zoom links no earlier than a day prior to the event. This is to avoid attendees clicking on zoom rooms and questioning why there are no sessions.
c. Some attendees would not receive organisers’ announcements and 99% it is related to them being unsubscribed from an event platform. You will need to contact a support team, so they can help.

5. AV Equipment required

Hybrid sessions are run at the conference venue via audio visual equipment. They will be live streamed on to virtual attendees via Zoom and accessible via an event platform.

The correct functioning of the equipment is key in the delivery of a hybrid event. For that purpose it is recommended to consider the following steps:

a. Determine your audio visual equipment requirements and confirm that the prospective venue can fulfil them. During the hybrid 20th plenary the following equipment was in place:

   - For plenary sessions (main sessions):

   Film screen, camera, projector, laptop*, headsets for each speaker at plenary sessions and/or handheld microphones for the Q&A session.

   - For parallel breakout sessions (parallel sessions):

As a minimum, film screen and projector. Camera, laptops*, and microphones (one for a speaker and one for Q&A) were required. Please note that some session organisers may have additional equipment requirements that they will communicate to the venue.

- Laptops*:

One laptop per session/room where a Zoom room can be set up and will be used only for logging in to Zoom & streaming. It can't be used for monitoring a chat or browsing any links/access to documents. Laptop switching should be avoided to make the stream setup as simple as possible. Session chairs of each parallel session will be required to bring their own laptop to monitor the chat and act as a co-host for the Zoom session.

- Plug socket stations

Each venue room should be set up with charging stations, so attendees can charge their devices. Number of charging stations needs to be decided in time before the conference depending on the room layout. As a complement, adaptors and extensions are also required per room.

b. Perform a site visit (where possible or ask locals to do it for you) to check the venue and equipment. Use a checklist that includes technical details about the equipment.
c. Confirm the duration, resourcing, and type of technical support that will be available. As discussed in section 2, having dedicated technicians during the day is essential.
d. Agree on tests needed. During the RDA P20 tests for the audio/connection and Zoom links were done at least 30 minutes before the start of each in-person session. For remote speakers, tests are required to be run at least one hour prior to the session start or alternatively, during a catering break (when a room is available).

6. Requirements for breakouts session organisers/chairs

It is important to mention that apart from approving sessions and including them into the main programme, event planners need to provide support to session chairs (those who run them). Support (depending on your event) might include programme allocation, notifying about any technical processes and how to use audio-visual equipment, event platform, presentation materials collection, and also allocating staff to help on the day.

All chairs of the approved RDA plenary breakout sessions are responsible for creating and managing their own sessions' programme. Session group chairs organise their own session agenda, structure, select speakers, and the timings (within given 90 minutes).

However, the RDA Secretariat (where applicable 'in collaboration with the local organising committees') normally provides the following support to each breakout session:

- **Creation of collaborative session notes**

3-4 weeks prior to the Plenary. The RDA Secretariat also links session notes to each session page on the RDA website.

Collaborative session notes are Word documents created for each approved breakout session to be used as rolling notes prior/during and after the Plenary. Group members share their agendas, notes, Q&A in the collaborative notes documents and those are normally open to all. These are important documents to reflect discussions during the sessions and use in the future.

- **Providing guidance for chairs on how to run a hybrid/virtual event with general recommendations and specific processes applicable to each plenary.**

Session chairs manage their own sessions. To help them with logistical and technical questions, RDA Secretariat prepares a guideline for session chairs on how to run a successful meeting (whether it is fully online or hybrid).

The guidance provides an overview on basic topics such as:

- Recommendations on how to run a sessions;
- Roles and responsibilities of a session chair, session moderator;
- Secretariat's role and support;
- Links to working documents: collaborative notes, post-webinar proforma, links to web pages with main resources (programme, pathways, etc), to an event platform;
- Steps on how to upload their session presentations, details on arranging AV equipment tests.

- **Providing staff to support session chairs both on-site and virtually.**

On the Plenary days each breakout session is required to have at least one person supporting a session on site (at a venue) if it is a hybrid format or fully virtual (online). To help with this, volunteers are invited. The volunteer numbers depend on the numbers of breakout sessions you have scheduled.

- **Testing and ensuring on-site locations are equipped to facilitate hybrid sessions**

Local hosts should be able to advise you on what audio-visual equipment is available in each venue room. They should also advise on what particular equipment needs to be hired or changed to facilitate hybrid streaming. Most of the time a venue would have the following equipment: screen, projector, speakers, microphones, wi-fi, connection points, socket points, camera.

If there is no opportunity for you to travel to the venue and test equipment with the locals, please ask them to test it, making sure all requested AV are available and set up for the hybrid streaming. Local technicians should be able to do so as they are familiar with it and report back to you.

Bear in mind that you should arrange a quick training with local technicians and volunteers to know how basic equipment works, what might go wrong and how to quickly fix it, etc.

- **Ensure technical staff are present at the venue to address any issues with equipment (cameras, microphones, laptops, etc.)**

Collect contact details and ways on how to reach technicians on the day of the plenary. There will be numerous occasions when something is not plugged properly or some audio-visual equipment is missing or there is an issue with connection, streaming, screen sharing, etc. If you or a volunteer can fix that, that's good, however sometimes a professional technician is required. Make sure you have their contact details handy, share them with session chairs or volunteers (whoever is responsible for raising issues).

- **Materials collection**

Materials collection for each scheduled session is required to be completed at least one week prior to the event. However, practice shows it does not work as there are many last minute changes to the presentation slides and chairs run behind deadlines. Our proposed deadline would be 2-3 working days prior to the session date (so, not a general date to all as some sessions are scheduled on the last day of the plenary!), unless local hosts have specific rules.
Materials are usually required to be collected in PPTX (PowerPoint Presentation File Format). To facilitate identification of each presentation please make sure to request session chairs to name their file as per the session title stated in the official plenary programme (provide a link to the programme).

Some session chairs will have a couple of people contributing to one session and each will have their own slide deck. To avoid any issues on the day (switching one presentation file to another from a different laptop - very time-consuming), please make sure to notify session chairs not to upload multi materials related to one presentation. So, ideally, you would request a single presentation file to be uploaded to a specific location. The reason for that is it would be smoother and easier to open and share a single-presentation only once (from an in-room laptop) and simply switch speakers (online/in-person). If you have multi presentations saved in a folder, there would be a delay in switching between them (time to close one presentation, find a new one, open and share). This is the guidance we received from the venue's technicians who have had experience running such tasks during hybrid conferences. Their exact words 'Having multi-presentations for in-person and online speakers caused many delays'.

That is to ensure that staff or technicians can access materials located in one place, download to PCs onsite, and safely present them at the venue. Downloading is the safest way of streaming presentations rather than doing it from a browser.

Locals would normally propose the best way of materials collection (Google drive, SharePoint, bring on a USB memory stick).

Communication goes to all session chairs via a general mass-email (created for all presented session chairs). RDA Secretariat normally asks to upload presentation materials to a specific folder (created in advance and open to all). Note, when creating a folder, make sure to use a clear title, e.g. create a folder with days/dates (e.g., 'Tuesday/21 March') > subfolders for each breakout session presented on that day (e.g., ‘Breakout 1’). This will help you and session chairs to upload their materials to the correct folder and for you, as an organiser, to identify and track what’s missing/uploaded.

There always will be someone who will not upload a presentation due to many reasons. Make sure that you have a couple of USB memory sticks with you on the day, in venue rooms to transfer presentation materials from a chair’s laptop to a laptop onsite. Alternatively, they can email the presentation or quickly upload to a dedicated folder.

7. Arrangements and test for speakers

As soon as speakers begin agreeing on presenting at the event, you need to start communicating to them about what you need from them. Start it sooner rather than later as practice shows 50% of speakers would ignore your emails (they are busy people!) and delays are inevitable. You should not expect speakers to contact you about the details; that is your job, not theirs. Make sure to check if they:

- agree on a test date/time
- have registered (if applicable)
- uploaded their presentation materials
- send photos and short bios (to be published on the event’s website)
- notify which venue room they will be presenting, what date and time
- share an agenda of each session

A couple of weeks before the event, check in with each speaker about their date and time for testing their presentation and/or connection/sound, etc. There always are two scenarios of testing, onsite and remote (online).

- **Onsite**: this is the easiest way of arranging and testing equipment for speakers. Firstly, make sure to check with venue technicians and the operational team that the required hybrid equipment is in place for each plenary session. Those might change depending on a number of speakers (therefore, microphones), connecting to a remote speaker, etc. Discuss options on testing equipment with speakers next.

Onsite test is normally organised 30 minutes prior to the start of each RDA plenary session. Speakers need to be notified about that minimum 2-3 weeks in advance. Once everyone is in the venue room, a local technician can quickly go through testing equipment (microphones, sound, presentation materials); RDA plenary organisers should distribute an agenda with detailed timings for each speaker’s presentation, and show their seats on the stage.

- **Remote**:

Some presenters/speakers may be presenting remotely. To ensure that they can do so, please see the following steps.

For Breakout Sessions (parallel sessions) - zoom rooms set up as a “Meeting”

Any remote speaker can click on the zoom link like an attendee from the event platform (or whichever event software being used). They will enter the room as an attendee and will need to be made a “co-host” by either the volunteer opening the room or another co-chair that has already been given host/co-host rights by the volunteer.

All co-hosts/hosts should be able share their screen automatically, but it is wise to test before the meeting starts.

For Plenary Sessions (main sessions) - zoom rooms set up as a “Webinar”
Any remote presenters speaking in a Plenary session (a webinar type zoom room) will need a special link to join the room before the webinar is started.

Volunteers logged in as any of the RDA Secretariat accounts will be able to login and start a “Practice Session” before the actual start time. Once the Practice session is started by a host account, any presenters with a speaker link may enter as well.

To issue speaker links to the remote presenters for Plenaries, in Zoom click the webinar name, navigate to invitations, and hit edit on “invite panelists”. Sending them an invite will automatically generate an email from zoom with an invitation and link to the webinar’s practice session.

If a panelist cannot find their link the day of, you can log in and resend the invite at any time, or simply email them the generic “Panelist” invite you’ve created.

You or a local technician will need to open the plenary session Zoom room first, so allow 5-10 minutes prior to the speaker’s test. Arrange a test with a remote speaker no later than 30 minutes before a plenary session starts, so ideally 50-45 minutes before. This is to allow time for any issues that might arise. The speaker should be notified to use exactly the same log-in Zoom details to join the real session once their time is up.

8. Resources and further reading:

- ’Planning hybrid events’ September 29, 2021
  https://zenodo.org/record/5532595#.ZEAGDfzMK5f

- Hybrid event technology solutions: your essential guide
  https://www.eventbrite.co.uk/blog/hybrid-event-technology-ds00/