Guidance for Planning and Hosting a Successful Hybrid Event - Reflections from the ACCESS Annual Assembly 2022

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Introduction

ACCESS (Advancing Capacity for Climate and Environment Social Science) is funded by ESRC (Economic and Social Research Council) to champion climate and environment social science for five years (2022-2027). It is headed by Professor Patrick-Devine Wright of the University of Exeter, with Professor Birgitta Gatersleben of the University of Surrey as Deputy Director. ACCESS aims to provide leadership on the social science contribution to tackling and solving a range of environmental problems, including a sustainable and biodiverse environment and a net zero society. ACCESS will build capacity for interdisciplinarity and leadership amongst early career social scientists, respond with agility to requests for social science insights from stakeholders, scope new research questions and enable data exchange and use. A flexible fund, valued at £1m, will provide resources to generate new insights and solutions on themes such as interdisciplinarity and evidence co-production.

As part of our objectives to improve visibility and coordination of environmental social science across sectors, ACCESS will hold an Assembly annually across our five year duration. The first ACCESS Annual Assembly was held across two days in June 2022. It was intentionally timed to occur early in the first year. As such, the aim of the event was to clarify the aims of the ACCESS leadership team, support network building, sharing insights and experiences, coordination and collaboration across a range of partners from different sectors (civil society, policy, industry and academia). To provide focus, we selected four key topic areas: Interdisciplinarity, Knowledge Co-production, Data and Horizon Scanning.

The Assembly was the first event organised by the team and was a relatively small event in terms of total participant numbers (day 1: 42 in person, 30 online; day 2: 47 in person, 24 online). Everything was done with the aim of enabling co-production and inclusivity. Following on from this, an early decision was taken to hold the event both in person and online. This raised numerous challenges in terms of event organisation and administration – challenges we could not find set down in any existing Guide. It is in the spirit of collaboration that we share learnings from our experiences in this short guide. Our hope is that our reflections can inform future events to enable their success.

Reflections on Pre-Event Planning

Have a Critical Path Event Checklist. Begin this on the first day of planning.

The email traffic is heavy for an event of 50+ people – especially in the days immediately before and during the event when dropout or last-minute requests arise. Suggest one dedicated staff member to monitor an event mailbox during the event.

Venue

Begin with a clear idea of the budget. Keep a detailed record of expenditure to track allocation across budget categories (travel, catering, hotel). Ensure the project leadership team are regularly kept up to date with expenditure assumptions from different bookings.

Book a conference/workshop venue early. Look for a large bright social space. If you plan to use breakout groups, find a venue with all seminar rooms near the main lecture theatre. Ensure easy to access outside space in case of good weather.

Book AV support early and have a test meeting with AV support staff ahead of the event to ensure all angles are covered.

Book a lecture recording. Engage with venue Facilities Coordinator to ensure prompt assistance on site on the day.

If the event is on campus, be aware of internal agencies that might need to be involved/informed e.g. campus services/Event teams etc and procedures such as logging the event on a campus activity tracker.

Accommodation for participants

While in many cases, accommodation is left to participants to book themselves, in our case we had funds to do this for participants. In that case, it is worth investing in the comfort of as good an hotel as the budget allows – participants appreciate the thought and feel well looked after.

Choose an hotel(s) located close to the event venue as it also promotes sustainability through active travel between each location. We had prepared to book taxis if required but found instead that participants preferred to walk – this was helped by good weather on the days of our event!

In our case, we chose to have the event dinner in the hotel venue. This simplified travel challenges. In that case, establish a good relationship with the hotel/restaurant staff and make sure to find out who will oversee the group at the conference meal. Pay attention to the details of the menu (e.g. are calories in vegetarian menus sufficient?). Providing a welcome drink before dinner is also a good idea.

Catering

Outsider (i.e. not University managed) catering allows for greater choice and option to use local sustainable caterers. Again, good fare is vital to the overall success of the event. Event attendees always remember things like the catering! Pre-attendance planning must include questions on dietary requirements. Encourage participants to bring their own water bottles.

Badges/lanyards are essential to enable networking. Try and pre-use existing ones that can be returned at the end of the event or encourage participants to bring their own.

Make sure to have enough people on hand to cover all tasks on the days of the event. Be prepared for last minute drop-outs in facilitators so gauge numbers accordingly.

Schedule regular weekly meetings with the core organisational team early on. Involve additional staff nearer the date of the event so everyone is clear what is going on.

Develop a detailed workplan for the day(s) of event

Share the working schedule with break-down of participants' interaction ahead of the event with all involved (staff, speakers, tech support). Make sure all staff involved know their roles on the day (e.g. facilitators for breakout group discussions). Have a contingency role in place if a speaker/chair/facilitator is unable to attend or is unable to present in person.

Equality, Diversity and Inclusion (EDI)

It is important to establish EDI requirements at an early stage, for example via a registration stage/booking form. Prepare post-event evaluation to send out very soon after the event if not captured at the event itself.

Designing the event programme

We timed our progamme to begin at lunchtime on day 1 and finish in the late afternoon of day 2. This enabled access via public transport for most participants on the same days as the event itself and minimised nights away from home.

Since a key aim of our event was to enable networking by participants across sectors, an early decision was taken to balance the emphasis on themed sessions with coffee/lunch breaks in the event programme. Often conferences end up as mostly lecture sessions with minimal opportunities for discussion and networking, apart from an event dinner.

Determine the key themes of the event to match up with and support project objectives and work tasks, but ensure there are not too many topics, so that each can be treated in sufficient depth.

Design sessions to showcase the expertise available as well as promote inclusivity. For our session on Interdisciplinarity, four eminent leaders were recruited to lead discussions and share their insights. By selecting individuals with different roles and positions inside and outside the project team, further networking and collaboration was encouraged. For our session on knowledge co-production, we gave voice to early career researchers by choosing to focus on Policy Fellowships and organising the session to showcase how fellowships are handed across different policy contexts. Across all sessions, we ensured that session leaders included non-academics (e.g. representatives from Nature Agencies) so that the multi-sectoral focus of the event was a constant feature. We were also careful to ensure gender balance in all sessions.

For co-production, invite leaders of each thematic session to take ownership of how they wish to organise their session. Ensure careful tie-in back to host organisation for logistical support (e.g. timings, breakouts, facilitation, AV needs etc.)

With large numbers of participants at an event, organising breakout groups is useful to facilitate small group discussions, as well as further promote networking and collaboration. Since we were offering a blended event that includes both face to face and remote participants, we decided to organise separate breakouts for each type of participant, presuming that combining both types within breakouts would be challenging to allow conversation and interactions. Broadly speaking, this worked well – but needs appropriate numbers of skilled personnel to lead each breakout group and facilitate discussion and note-taking.

Audio/Visual inclusion for remote participants

Remote participation in a blended event can often feel second class – without the same opportunities to enjoy the catering on offer, socialising and event dinner! Small details matter to ensure remote participants are well looked after. It is often not enough to simply have audio and visual capabilities (e.g. a webcam and microphone) in order to make the online experience as engaging as attending in person.

Important questions to consider are:

1. **What will online participants see? What will they miss?**
   For example, they may only be able to see a small portion of the front of the room. To mitigate this, make sure that speakers are aware of the limits of the camera's range, to make sure they stay visible and do not wander off camera! You can also add more cameras to an online meeting by joining from a laptop and pointing the webcam at the audience.
2. **What will online participants hear? What will they miss?**
   Test out the range of the microphone(s) before you start, and make sure that you have someone taking responsibility for taking a microphone to anyone in the audience who wants to ask a question or add a comment. If this is impossible, make sure that the contribution is repeated by someone with a microphone before it is responded to.
3. **How will you invite engagement from online participants?**
   When you're in full flow, it's easy to miss virtual hands or comments in the chat of whichever online platform you are using. Make sure that someone is responsible for monitoring the online participants and indicates when there is an opportunity to hear from them. Ensure a facilitator is available for any late-comers who might need some guidance or assistance. Think about keeping a few minutes of each feedback session aside for online engagement, to make it clear that everyone in person is focused on the contributions of those joining virtually. You can also use tools such as Mentimeter or Slido to invite engagement from online and in person participants at the same time, bridging the gap between them.
4. **How else might the experience differ for online participants?**
   What will those joining online do during a coffee break? How can you replicate the experience for them? For example, you could move people into small breakout rooms so they can have informal conversations with each other during breaks. Make sure to address online participants directly in between sessions, so they don't feel left out and secondary to those attending in person. Use the Chat function to signpost participants to any relevant links to access materials on line. Turn off the microphone in the plenary venue during coffee breaks.
5. **When and how do you want online and in-person participants to engage with each other?**
   It is possible to keep the different participants separate, e.g. through having online-only breakout rooms. This is the easiest option in terms of logistics, but consider the impact on building connections between participants. Hybrid breakout rooms are possible, following many of the principles mentioned above, but require careful facilitation to ensure that online participants feel included and able to contribute equally. In our case, since all breakouts were treated separately

(face to face vs. online), and since venue camera were mainly pointed at the speakers at the top of the room, there was little visual contact between the face to face and online audiences. Use multiple cameras to address this challenge.

6. **How will you tell if any issues arise for online participants?**
It is useful to have a member of the organising team joining online, in order to monitor the audio and visuals, and keep an eye on any accessibility issues that may arise. It is also useful to regularly check in with online participants, to keep them engaged and check that they can follow the session.

Post-event

Prepare thank you emails to send to all speakers/attendees/staff involved. De-brief with whole team very soon after the event to capture all wins and losses. If an annual or regular event, capture learnings and share for future occasions.

Event evaluation and social capital

While it is typical to evaluate an event using a post-event survey to all registered (which we did), organisers could consider utilising a Social Capital approach if networking is a primary goal. In our case, this meant opening the event with an online survey to provide a baseline measure of connections between all delegates that could be compared with post-event data. Quantitative data was collected on key variables including:

- Bonding social capital
- Bridging social capital
- Linking social capital
- Shared Understanding – members having a mutual comprehension of the purpose and form of the network, creating the ability to meaningfully connect within it.
- Trust – the belief that other members will act with the network's best interests at heart, increasing their motivation to do the same.
- Reciprocity – the opportunity for members to both give and receive value within the network.

Participants were given a brief overview of each characteristic, and then asked to rate their perception of each one out of ten. This was repeated in the post-event social capital evaluation survey.