

A Guide to Hybrid Conferencing

Please note: you are reading the digital version of our guidelines. For a clear-text version, optimised for text-to-speech software, please download the version available [here](#). This is a shortened version of our hybrid conferencing guidelines for experienced conference organisers. For a more detailed version tailored towards early career/PGR and first-time conference organisers, see [here](#).

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We would love to have your feedback! Please contact any of us if you have suggestions of what else to include in this guide and/or how to improve it.

Nick, Katharina, and Francisca, September 2022

A hybrid conference is not an in-person event in which the online component is just an add-on. Indeed, the aim should be to create an event in which both in-person participants and online participants are being served equally well. To achieve this, do not shy away from resorting to infrastructures that may be somewhat to the disadvantage of the in-person participants. (The importance of) creating a good atmosphere for remote participants is often invisible to in-person participants; explain to the in-person audience why you take certain steps and measure (e.g. breaks to correct for audio quality, muting and unmuting, etc.)

Whatever hybrid style you choose, make sure you spend a significant amount of time planning it. What you can do will be determined by several factors, among them:

- the software you use
- the size of the event (in smaller settings an ordinary group call might do, for bigger events with an anonymous online audience, a webinar structure allowing questions only when authorised by the organiser might be advisable)
- the hardware at the venue and the availability of hardware to online participants – for the venue, consider in particular clip-on mics for the speakers, and handheld mics for the audience in Q&A sessions, as well as cameras capable of recording *both* the speaker and the audience
- how tech-savvy the conference participants are

Here, we have assembled some ways of promoting a more fruitful blending of online and in-person participants (this list is not exhaustive!).

Know Your Technology

The main challenge for organisers of hybrid conferences is handling technology. This regards both: choosing a venue adequately equipped for the purposes of hybrid conferencing, and familiarity with using said equipment. The organisers must be ready at all times to assist all participants in all matters technology.

Audio

Make sure the microphone setup can clearly and loudly catch speakers (both those standing close to the mic and those who might have a tendency to walk around the room) *and* audience questions. Clip-on mics work well for the former while handheld mics work better for the latter. Another benefit of using microphones is that hearing aids might be able to connect with them allowing for better understanding for persons with hearing impairments.

Video

Think of ways to include the online audience as visibly as possible. We recommend two screens (one for presenting, one for showing remote participants). Make sure to have the remote audience permanently visible on the second screen, perhaps set on the side of the room. Online participants, moreover, need to see not only the speakers, but also the audience during the Q&A.

Connection

Establish chat-stations, i.e. permanent connections with online participants especially for coffee breaks. Consider having one dedicated place with a dedicated device (or devices) and dedicated accounts which keep a permanent connection open to the online audience. This allows any in-person participant to easily get in touch with the online crowd.

Technological Skills

Because of the additional technological demands of hybrid conferencing, even in fairly small-scale conference or workshop situations you will need more than one organiser who is very familiar with the technological aspects of a hybrid conference. This includes:

- Great familiarity in handling the communication software of your choice (Zoom, Webex, Teams, ...), including the ability to troubleshoot any issues, and awareness of what the technology used by an online participant can and can't do.
- Skills in chairing online events in an engaging and inclusive manner. Think about whether you want a double chair (one online, one in-person), or one chair plus a (technical) assistant. This will in part depend on what resources you have and on who among the organisers brings what skills. Often, it helps to have an online chair who is physically present at the conference - they can easily intervene if there are issues for the online audience.

Tip: Choose your venue according to the technological demands and, if possible, book the room for a rehearsal (most venues allow for rehearsals without extra charge). Give yourself enough time to test the setup and consult the house technician if you have questions or are unsure about how to use a device. Think about allowing participants (both in-person and online) to have a test run as well if they want to and if feasible.

Tip: There might be hiccups on the way. Don't worry if that happens: being transparent about mishaps in using technology can create group coherence. Do *not* just carry on and hope for the best when things are not working smoothly, but communicate when things go wrong. Plan sufficiently long breaks for setting up the technology. Five minutes breaks between two talks most likely won't do!

Presentation Modes

Vary the format of the talks, mix formats that are more in-person-friendly with more online-friendly formats.

- Synchronous and asynchronous presentations. Not all talks must have the same format. Some might be synchronous (i.e. live talks with live participants locally or online), some might not (e.g. pre-recorded talks). Mixing the format can send a signal to online participants that they are being included properly, and it will remind in-person participants that there are participants outside the event's venue.
- Synchronous and asynchronous Q&As. Often, live Q&A sessions feel the most challenging for online participants. While the main reason for this pertains to the technology being employed (lousy microphone, accidentally being muted or muting, ...), another reason is that online participants literally do not take up space in the room and thus may feel less present. While having some live Q&As will be both desirable and unavoidable, asynchronous modes of presentation *and* Q&A can be used for at least some talks to side step it all together.

Example: Consider the setting of a prerecorded talk plus forum discussion (both talk and Q&A are asynchronous in this example). Here, online participants would watch the talk and comment in a forum prior to the in-person participants' engagement. In-person participants would watch the recording together and would be given the time to consult the existing online forum discussion. They would then be able to discuss the recording following on from the forum discussion and record their input (which can then be fed back to the online participants). This requires a moderator/chair who blends the forum content with live discussion.

Make live Q&A sessions more inclusive

Even if mixing presentation modes, the classical Q&A format (with online live participants) will still be common. Here are some ideas of how to integrate online participants into a live Q&A session.

- **Make sure you have enough breaks before and between the talks and Q&A to allow for checking the tech setup.** A break between talk and Q&A of five minutes moreover is best practice for inclusive conferencing – so there are two reasons now!
- **Have an organiser in the room who is constantly connected to the online participants.** It's often not enough to just ask online participants whether the audio is okay because they will often say that it is even if it's just barely okay, and having a member of the conference organisation always online can help ensure that does not happen.
- **Consider having in-person participants walk to a fixed camera plus microphone setup.** Be aware, however, that this might create accessibility issues – a handheld microphone that's passed on plus a moving-head camera (which follows the speaker) are a good alternative.

Tip: When chairing a live Q&A session in an hybrid setting, there are unique challenges and ways of moderating the discussion that you should be aware of and should act in accordance with.

- Online participants are not likely to follow up on their questions if not explicitly asked if they have a follow up. If time permits, ask them if they are satisfied with the speaker's answer.
- It's easy for online and in-person participants to feel disconnected from each other, especially online participants when the speaker is giving the talk in-person. Alternate between questions from the in-person and online audience during the Q&A so both are kept engaged.

Accessibility

More generally, you should strive to have a conference that is as accessible as possible for all participants, whether they're attending the conference in-person or online. Consider:

- Having live captions during talks. This can prove essential for participants with hearing disabilities and could be a helpful resource for non-native participants as well.
- Choosing audio equipment supporting hearing aid technology and transcripts of the talks.
- Record the talks (and live Q&A sessions) for the participants that cannot join live for the entirety of it. This might be especially helpful for online participants in different time zones and/or who have caring duties.
 - For this, get the explicit permission of the presenter (and, if you choose to record the Q&A, every other person appearing in the recording). Make sure your written permission includes: context and date of the occasion, whom the recording will be made available to and how (university server, public server, etc.); the same applies for pre-recorded talks in an asynchronous format.
 - The advantage in terms of accessibility might come at the cost of a disadvantage in terms of the audience's willingness to participate in the Q&A. One work-around is to only record the talk (with permission), but leave the Q&A undocumented.

Note that different modes of presentation have different advantages and disadvantages when it comes to accessibility and inclusivity. Forum discussions might work well for those with caring responsibilities, but participants with visual impairments might prefer a classical Q&A. Using different presentation formats and methods can be preferable to meet different needs.

Tip: The perfect presentation format that would be maximally accessible unfortunately doesn't exist. Make sure that you attune the presentation format options not only to your participants but also to the venue's available infrastructure. Most universities have an accessibility team that will be most happy to assist you.

Informal Gathering and Networking

One of the main purposes of conferences in philosophy is to get participants to chat with one another, usually in an informal setting. Online participants, however, cannot participate in conference dinners or participate in lunch breaks during this informal networking. Hence, it is important to have an infrastructure available that includes online participants and allows them to interact with in-person participants. Here are some ideas of how to achieve that (again the list is most definitely non-exhaustive):

- Have a gathering with online and in-person participants using the software of your choice with breakout rooms or on more socialising-focused software like "Gather". If the conference spans over more than one day, consider a conference breakfast or lunch online on one, and a classical conference dinner on the other day.
- Consider having one of the meals completely online (perhaps utilising the infrastructure at the venue for in-person participants) such that everyone is on an even playing field.
- Little gestures can go a long way! If budget allows, why not send a little food basket of local specialities to the speakers participating online in advance?
- Make sure that there is an online infrastructure for breaks for online participants. Having some breakout rooms named "coffee corner 1" and "coffee corner 2" is easy to set up and creates options for interaction. Just like organisers will be around in breaks for speakers in classical settings, so should an organiser be around in breaks for online participants.
- Match in-person participants and online participants randomly at least during one of the breaks.
- Promote the usage of chatting stations for individual in-person participants to join the online crowd.
- Have a list of all the participants with short descriptions available to all participants. This way, asynchronous participants can be more easily integrated. In this vein, make sure to still have name tags for in-person participants, stating their name, pronouns and affiliation.

Extra Guidance

Plan for extra guidance and careful communication of timetables, talk formats and what is required of participants (both online and in-person)

Conference participants will need a lot more guidance through a hybrid event than through an in-person event or online-only event. This is so in part because there is not yet any agreed upon routine for hybrid events; and in part because there are more things to consider when it comes to making a hybrid event work.

Tip: Think about how to provide the programme and how to make it readily available throughout. It should not only contain the speakers but also the mode of presentation. Physical copies of programmes work for real life participants only, of course (although have in mind sustainability considerations). Websites or PDF documents work better for online participants.

Inclusivity

Of course, all rules of good practice for inclusive conferences apply to hybrid conferences as well, in particular:

- **Choice of Topic:** When choosing a topic, make sure that your conference attracts a diverse group of speakers and participants. This does not mean that niche topics should necessarily be avoided, but even conferences on such subjects can have representation of viewpoints that push the debate forward in novel directions that challenge dominant positions.
- **Choice of Keynotes:** When inviting speakers, instead of ranking them in a single list, try creating multiple lists according to methodology and demographic variability and then invite one speaker from each list at a time, ensuring that in the end you have one speaker from each.
- **Choice of Speakers**
 - To ensure greater diversity in terms of demographics and methodology, consider collecting (optional) demographic data when sending out your call for speakers. After ranking the submissions, in cases of close ties, disclose this demographic information for a fairer assessment of the merits of the candidates.

Tip: Be explicit in your call for speakers that you welcome submissions from members of underrepresented groups. It's a small gesture that can go a long way!

- When assessing submissions, do not take into consideration: Language (to ensure there is no bias in favour of native speakers); Presentation (you can reformat submissions to all fit the same format); Hedging (those with more experience and especially members of dominant groups tend to make bolder claims)
- If you accept submissions from multiple groups (postgraduates, postdocs, etc.), try creating different pools of submissions from which to select the accepted papers, ensuring you get representation from members at each stage in their careers
- **Funding:** Pay attention to the fact that very often junior speakers (early career or PGR students) are precluded from participating due to lack of funds as their travel and accommodation costs are not covered. Look out for EDI funding at your department to cover for speakers' expenses other than just the keynotes'.
- **Venue**
 - Make sure the venue of your conference meets as high accessibility standards as possible. Remote participation may, indeed, be one way to make events accessible for a plurality of disabilities – a perk of hybrid conferencing. But a venue should still meet accessibility criteria and allow for the easy participation of disabled individuals.
 - Have a quiet room so participants can take a step-back and recover from the often-intense environment of the conference.
- **Catering:** Different participants will have various dietary requirements. Make sure that the catering at the conference can accommodate those requirements with good quality. Further, consider providing vegan catering at your conference as it both meets dietary requirements and makes your conference more sustainable.

Note that hybrid formats can aid with diversity and inclusiveness in several ways:

- Different formats have different strengths, and so using different presentation and participation modes can increase the quality of the participants' experience at least with some of the talks (those that meet their needs particularly well)
- Having an online and in-person audience can calm discussion down. It is more difficult to talk over one another when there is an in-person/online gap bridged by a chair
- Hybrid conferencing requires more breaks and more active planning of the time spent. This can help with engagement and create a more inclusive atmosphere for everybody
- One restriction is that every person needs to meet some minimal requirements with respect to tech and the ability to use it. Having appropriate support is thus a necessity!
- The advantages of hybrid conferencing regarding sustainability are obvious, but it is worth highlighting them: having online keynote speakers will reduce emissions for said speaker to practically zero
- The same rules for fair and inclusive practice that apply to any in-person only conference apply to hybrid conferences as well (for a good source on this point, see the MAP UK Inclusive Events Guidelines)