Open Letter to Our Future Selves

Dear Future Selves,

We are writing to you during a period of transition. Just as we're starting to feel pretty comfortable with remote facilitation two years into the global pandemic, the sands are shifting again. Our emergent new "new normal" requires hybrid facilitation, where some participants (and facilitators) gather in person while the rest of the group participates via their computer screen. This introduces additional potential for new unknowns and uncertainties, especially in terms of the balance of decision-making authority and interpersonal dynamics.

The observations below come from our initial experiences navigating this new terrain, including some rough patches along the way. We decided to document them both as a way of sharing what we have learned with others who might be facing similar challenges, and also to create a placeholder so that in a few years' time once we're feeling comfortable (hopefully) we can remember where we started.

For now, though, we're still figuring all of this out. So keep in mind the 'you' in this scenario is also US. We invite your learning, too. As with so much about the pandemic, we're all in this together!

**Risk 1: In-person and remote participants feel disconnected from each other in a hybrid gathering.**

| *You're probably in good shape if…* | *You may struggle if…* |
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| You're working with a co-facilitator, and one person can be present in the room while the other is facilitating remotely (either from a separate location, or in the "in person" space but participating via a computer). Hybrid facilitation seems to help balance participation and equalize expectations between in-person and online participants. | You are a solo facilitator - either online or in person - trying to create a bridge between online and in person participants. Different modalities of participation create different needs, and it can be difficult to attend to multiple groups simultaneously. |
| The numbers of in-person and online participants are known in advance and remain stable. | There is a last-minute shift from having just a few people joining online to having a substantial online group. In our experience, what may start out as 'just a few' that then bumps up to ⅓ of the group the day before. This kind of dramatic, last-minute change makes it particularly difficult to plan for hybrid integration. |
| You build in in-room facilitation pauses and check-ins with the online group, supported by an online facilitator or 'producer.' | Your attention as the facilitator is consistently and primarily on the in-room participants. Focusing primarily on the in-room participants |

| | can be even more tempting if key decision-makers or other key roles are in-person. |
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| There are opportunities to bring in-person and remote participants together in smaller mixed groups. Consider having participants bring laptops to integrate online participants into breakout groups, for example, as opposed to always having the online group BE a breakout group. | There are few, if any, opportunities to 'blend' the participants across in-person and remote venues, other than in plenary. The online group may develop some cohesion but could feel isolated from in-person participants without more informal, smaller fora for interaction. |

*Lingering question:* How do you effectively generate shared work products, provide feedback and build consensus across online and in-room groups? Flip charts, sticky notes and dot voting are hard to share with a remote group, while online worksheets don't easily allow for in-room feedback. This one we're still working on…

*Notes to self:* Build a team with the range of skills demanded by hybrid facilitation. The array of skills required to facilitate a hybrid event means that you may need a larger facilitation team than you're accustomed to. Skills needed may include:

- Plenary facilitation, both in person and online;
- Breakout group facilitation, both in person and online;
- Hybrid technical production to ensure seamless audio-visual engagement both online and in the room;
- Technical or subject matter expertise (e.g. for lightning talks or presentations);
- Event planning skills and coordination (e.g. room bookings, catering, IT rental);
- Familiarity with COVID safety considerations and regulations.

**Risk 2: Too many moving parts translates into a confusing participant experience (and a frantic facilitation experience)**

| *You're probably in good shape if…* | *You may struggle if…* |
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| You made an effort to simplify your design. Your facilitation team has an adaptive mindset and can anticipate potential rough spots. | Your design is complex (several activities with different moving parts, multiple working spaces, and/or movement in and out of breakout groups). |
| You have a designated producer who is really clear about what is supposed to happen and comfortable with the full design. The producer can help clarify instructions online and manage transitions while also tracking what is happening in the room. This can help ensure that connection between participants joining from different locations AND a robust team to support and provide backup as needed. | You put too many roles onto one individual, such as facilitating in the room, troubleshooting the unexpected, and managing online transitions. You don't have small group facilitators for each group or extra support to help manage technical glitches. |

| You have a clear expectation of numbers of online/in-room participants, and at least a general idea of relative power dynamics that will show up in each OR if that's not possible, you are doing some scenario planning ahead of time to be able to pivot if needed. | The online/in-room balance shifts at the last minute in substantive ways. |
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| You have a decent sense of the technology capabilities among the participants, and/or have the opportunity to provide a quick tech briefing in advance to level the playing field. | The facilitation plan requires sophisticated tech skills or hands-on engagement that some participants struggle with, without adequate time or resources to provide on-the-spot support or a way to centralize the more tech-savvy tasks with those who have the requisite skills. |
| You also made for a dry run with all your facilitators, producers and breakout group facilitators, especially a full dress rehearsal where you practice what you will say, test technology and perfect your timing. | Not everyone could attend the dry run, and/or you didn't spend the time to ensure your instructions are clear. You were not able to test whether the technology works as anticipated. |

*Notes to self:* Be prepared to accommodate last minute logistical shifts. The relative numbers of in-person and online participants might change at the last minute, and that can have ripple effects across your hybrid event design. Try to remain flexible on design elements like:
- the frequency and duration of breaks;
- the structure and organization of breakout rooms (both physical and online);
- the number of facilitators on hand; and
- even how much food to order.

### Risk 3: Space/sound/tech logistics

| *You're probably in good shape if…* | *You may struggle if…* |
|---|---|
| You plan a session with IT/venue staff before you write your facilitation plan, and then develop a plan for the capabilities available. You run a speed test in different locations of the meeting rooms (e.g. using https://www.speedtest.net) or have the meeting venue send you screenshots of the speedtest results if you can't run the test yourself. | You expect all participants to have the same technological and bandwidth capabilities and don't validate this expectation in advance. |
| You are able to project faces of online participants into the room (on large screens, for example) and move your in-room camera to | You weren't able to test out your camera and screen options in advance. You didn't develop a strategy to ensure online and in-room participants can see each other well at key |

| | |
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| capture key speakers AND key work products coming out of the session, or toggle between. When bandwidth allows, seeing the face of the person reporting back from a small group discussion, for example, keeps everyone more engaged. | report-back moments. |
| One word: Microphones! | You have a giant room or weak sound system such that online participants have trouble hearing the in-room conversation or vice versa. Space and masks are a plus for current COVID protocols but can really work against communication! |
| You can create an agenda that balances the energy of an in-person event with the potential fatigue of online engagement. We experience two-three hours online as a current max. | You develop an all-day hybrid event as if it were an in-person event and expect online participants to just power through. |

*Lingering question:* What can you do to leverage the additional energy that in-person participants feel as they connect face to face without 'cutting out' the virtual participants?

*Notes to self:* Invest in technology _and_ tech support. Creating an integrated experience for all participants regardless of whether they are joining in person or via their computer screen requires enhanced IT capabilities and coordination, including:
- A venue with reliable, strong internet connection and good sound system
    - Explore whether you can set up a separate conference WIFI that can only be accessed by participants who have a password.
- A high-capacity local technical support team to provide key technical equipment (laptops, microphones, multiple screens with different displays) and ensure excellent sound quality and visuals for in person and online participants (see Ukraine's list of equipment and technicians).
- Individual microphones for panel speakers and multiple microphones for participants (ideally individual microphones) with a direct feed to the virtual room. Consider supplementing microphone input by having an in-person producer pass around a hand-held microphone.
- Significant pre-testing of all equipment, breakout rooms, and online tools.

Learning is a process and you don't have to go it alone! Now may be a good time to call on others to share experiences or work on solving a complex facilitation challenge as a group. Back in the summer of 2021, a CLA Community of Practice (CoP) Sprint Team did just that and captured it all in this Resource Deck CLA CoP Sprint on Virtual Facilitation, including a few on hybrid facilitation. Now may be a good time to convene a new sprint team…what do you think?