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Introduction

This handout is designed to accompany the recorded video trainings, *How to Host a Successful Hybrid Meeting or Event*, [Part 1](#) and [Part 2](#). Part 1 focuses on the technology your PTA should consider as you plan, and part 2 focuses on facilitation strategies to increase your hybrid success. You are strongly encouraged to view the two recordings before using this document. While this handout can stand alone as a resource, the recorded trainings provide context and additional suggestions.

Part 1: The Basics

Hybrid = Equity and Inclusion

Hybrid is a way for PTAs to include everyone, everywhere in PTA events. Hybrid events and meetings allow a broad group to benefit from PTA’s work and engage in achieving PTA’s mission.

Hybrid ≠ Live Streaming

The key to successful hybrid events and meetings is everyone —no matter whether they attend virtually or in-person—can see and hear each other and equally participate with each other. This is not the same as live streaming, where virtual attendees are passive observers.

	Live Stream	Hybrid
Virtual attendee sees	video feed from in-person event	everyone attending virtually or in-person
In-person attendee sees	in-person attendees only	everyone attending virtually or in-person
Virtual attendee hears	audio feed from in-person event	everyone attending virtually or in-person
In-person attendee hears	in-person attendees only	everyone attending virtually or in-person
Virtual attendee participates with	no one	everyone attending virtually or in-person
In-person attendee participates with	in-person attendees only	everyone attending virtually or in-person

Hybrid requires your PTA to run mirror-image, simultaneous virtual and in-person events/meetings. Do not do anything in one that cannot be done the other.

Technology and Facilitation: equally important.

Neither technology nor facilitation is more important, so PTAs must plan for both to host a successful hybrid meeting or event. National PTA’s two *How to Host a Successful Hybrid Meeting or Event* video trainings address technology ([Part 1](#)) and facilitation ([Part 2](#)). We encourage you to view both, starting with [Part 1](#).

Meetings vs. Events: an important distinction.

All PTAs can host hybrid events (speaker presentations, town halls, panel discussions, etc.). An event is defined in this handout and in the videos as any PTA gathering that does not require voting, minutes, and debate.

Some state laws and PTA bylaws do not allow hybrid business meetings—meetings are when a board, committee or the general membership gather to vote, debate, and conduct business. Be sure to check with your state PTA before planning a hybrid *meeting* and consider amending your PTA's bylaws to allow for hybrid meetings if that is an option.

Part 2: Technology

3 Main Technology Components

1. **Visual:** Digital cameras, cell phones, laptop/device cameras, etc. that allow the in-person audience to [see](#) the virtual audience and the ones that allow the virtual audience to see the in-person audience.
2. **Audio:** Speaker phones, microphones, computer/tablet microphones, etc. that allow the virtual attendees to [hear](#) those attending in-person and vice versa; and
3. **Participation:** Cloud storage tools like Google Drive, Box, etc. to house online agendas, handouts, brainstorming spreadsheets, and virtual whiteboards, polling or other cloud-based collaboration tools to allow everyone at the event to share and interact together.

Venue Determines Technology

For small groups sitting around a table, a laptop may work at providing the camera and audio needed. Your PTA may want to add a separate monitor for a better picture.

For larger groups or if your group is spread out, your PTA may need to add a speakerphone or use remote microphones to both amplify the virtual audience sound and pick up the in-person audience. Speakerphones allow two-way communication and eliminate the need for additional microphones. Consider asking everyone attending to bring a device or laptop to sign into the virtual platform. Then everyone can see everyone, and everyone can use the chat box and whiteboard (if your platform has one), eliminating the need for extra cameras and cloud-based sharing tools. This works best in smaller groups. To prevent feedback, however, you will want to add remote microphones. Google how to do this type of set-up or watch the video link provided below for assistance.

Projectors can help, depending on the size of the room. Project the virtual attendees on a screen or wall for all to see, and a one or more digital cameras/smartphones on tripods aimed at the in-person audience for the virtual audience to see. Some projectors have built-in microphones to amplify the voices of the virtual attendees.

Depending on the equipment used, your PTA may need to sign multiple devices into the meeting/event platform. Keep that in mind as you select a platform. Zoom works well in this setting.

Virtual attendees typically have access to a chat box of some kind. To level the playing field, use an [online whiteboard](#) or a [sharing/brainstorming document on a cloud-based drive](#) and ask everyone—virtual and in-person—to use that tool. The same with polling. Your virtual platform may have a polling feature. However, if in-person attendees are not signed into the virtual meeting, they cannot access that polling feature, so find a [web-based polling tool](#) and ask everyone to use it. For equity and inclusion, everyone should use the same tools.

Before You Shop for Technology or Venue: important questions

- ? What technology options are available where we usually hold our meetings or events?
- ? How will we use the equipment we purchase? At all our meetings/event or only at a few?
- ? Does a purchase give us flexibility in where we can host our meetings/events?
- ? Since PTAs are not required to meet in a school, have we considered other hybrid-equipped public or private space that might be available? Places like libraries, community centers, or local colleges and universities? Have we explored conference rooms in big-box stores, supermarkets, local business parks, and those belonging to other nonprofit associations?
- ? Has our PTA researched hybrid-equipped public or private space that can be used for all or some of our events and meetings? Could this influence our decision purchasing equipment?
- ? If we find hybrid-ready space elsewhere, does it make financial sense to make a PTA technology purchase?
- ? How will we adjust our budget to fund our purchases, rentals and subscriptions? Should we seek a sponsor? Is there grant money available to support our technology plan?

Technology Choices

Remember, [your PTA can purchase equipment and pay subscription fees](#), and the purchased equipment and subscriptions belong to the PTA and not to any person.

[Review your PTA's options](#). Purchase of one type of equipment may eliminate the need to purchase others. A mix-and-match approach may provide your PTA better flexibility.

[Digital cameras](#) range in price but usually have clearer pictures and more features than smartphone cameras. Decide what works best for your PTA to show the in-person audience to the virtual attendees. [Tripods](#) are inexpensive and can add flexibility.

[Speakerphones](#) vary in price from less than \$100 to hundreds of dollars. Look for a wireless device for flexibility of use, easy set-up, enough battery/talk time to meet your needs, and find a model suggested for a conference to ensure it picks up and transmits sound for a larger group. A good speakerphone will eliminate the need to purchase other microphones since it will amplify virtual attendee sound as well as pick up in-person attendee voices as well.

[Lavalier or lapel microphones](#) work well if a presenter or group of presenters will be speaking at your event or meeting. They can be clipped onto a shirt, jacket or other clothing and pick up the voice of the presenter. Lavaliers can be purchased individually or in groups, and some systems are expandable. The range in price from less than \$100 to hundreds of dollars.

[Conference camera and speakerphone combinations](#) created to convert a standard meeting room into a hybrid meeting room can be purchased. These range in price from about \$400 to thousands of dollars,

but they eliminate the need for additional purchases. They may work well if your gathering space size fits the requirements of the system and if your PTA consistently uses the same space.

Omnidirectional conference microphones designed to pick up the voices of in-person attendees. They range in price from less than \$50 to hundreds of dollars. Some are directly wired into laptops, and some are Bluetooth. They can be purchased individually or in packages. Consider your space and needs.

Wireless speakers to amplify the voices of virtual attendees can be purchased for \$35 - \$150. Consider battery life and portability when you purchase.

Cloud-based sharing platforms such as Google Drive, Sync and Box can be free to nonprofits or, for expanded storage, can cost \$2-5 a month. Some PTAs use Microsoft products such as Teams. Compare prices and storage and find a solution that meets your PTA's needs. See the item below for a cost and feature comparison.

Cloud-based sharing, brainstorming and polling tools vary in price and features. Google Forms, Survey Monkey, and Doodle, among others, can be used for polls and surveys. Spreadsheets and docs stored there could be used for brainstorming. **Cloud-based whiteboards** such as Whiteboard Fox, Limnu and Miro can be used for brainstorming. Some are free, and some require a monthly fee based on the number of users.

Where do I find more technical help and information?

Review the links in below for great videos and articles on purchasing and setting up hybrid technology, and the products available and how to use them. Some the articles are related to products but still contain good information, and some of the videos contain ads.

- Watch [Parts 1](#) and [2](#) of the *How to Host a Successful Hybrid Meeting or Event* mini -video training.
- Markus Seppala @MarkusPresents You Tube videos (some ad content)
 - [5 Hybrid Tips](#) includes on technology, set up, engagement, streaming, etc. (46 min)
 - [Hybrid Setup for Meeting and Teaching](#) includes using Zoom and a smartphone. (9 min)
 - [Basic set up](#) for a hybrid meeting/event using Zoom and the equipment you already have on hand. (8 min)
- Rotary
 - Video [Going Hybrid - Small Meeting Tech Setup](#) (6 min) and
 - [Going Hybrid - Small Meeting Tech Setup](#)
- Read the [How to Get the Technology Your Local PTA Needs](#) National PTA OneVoice blog with its list of tools and links to resources.
- Visit [TechSoup.org](#) and check out their nonprofit technology marketplace to find great deals on technology and tools for your PTA.
- [Zoom tech guidance](#) for hosts and panelists.
- [Zoom Guide to Virtual Events](#) (from planning and pre to follow up)
- Article on [13 Best Online Whiteboard and Collaboration Tools of 2021](#) (including free tools)
- Article on the [best free cloud storage space](#).

Part 3: Facilitation

Planning is the Key

To facilitate a successful hybrid meeting—one where the virtual and in-person attendees all hear each other, see each other, and participate with each other—must deliberately plan and strategize. If your PTA is informal and loose in meetings and event, hybrid meetings will require you to become more structured.

1. Planning Pre-Meeting or -Event

- ✓ For hybrid meetings, check your PTA's bylaws and with your state PTA to be sure your PTA is allowed hold a hybrid meeting.
- ✓ Determine [what can be done outside the meeting/event to streamline](#). Can ideas and opinions be shared, questions asked, etc. before meeting to save time at the meeting? This is sometimes called [asynchronous brainstorming](#) and can shorten hybrid and face-to-face meetings.
- ✓ Know what [technology is available at the venue](#) and plan ground rules and processes to overcome obstacles to equity and inclusion. See [Part 2](#) of the video training for an example.
- ✓ Select, orient and prepare a [Virtual Facilitator](#).
- ✓ Select, orient and prepare in-room [surrogates or partners](#) if you plan to use them.
- ✓ Select, orient and prepare a [Technical Support Facilitator](#).
- ✓ [Create ground rules](#) (see below) so everyone sees and hears everyone else, and everyone can participate fully.
- ✓ Decide if you will [brainstorm](#) or [vote](#) during the event or meeting, and what process or technology you will use. Add that to the ground rules.
- ✓ Determine how you will [recognize speakers](#) and include the process in the ground rules.
- ✓ Determine what [cloud-based storage you will use to house meeting/event materials](#) like the agenda, handouts, ground rules, attendance sheets, etc. Make sure to include a link to that folder in the invitation, on the agenda, and in promotions.

2. Build an Agenda

- ✓ [Structure the event or meeting](#) so there is time at the start to explain tech, introduce everyone, go over the ground rules, and explaining voting (if applicable).
- ✓ Introduce the [Virtual Facilitator and Tech Support Facilitator](#).
- ✓ If possible and the size of the group allows, build in time for an [icebreaker or introductions](#). This can help all participants feel part of a single group.
- ✓ [Time the agenda](#)—aim for under an hour. Focus on what is important and what must be done.

3. At the Meeting

- ✓ [Arrive early](#), both in-person and virtually. Be sure all technology works.
- ✓ Ensure the facilitator [acknowledges both the virtual and in-person attendees](#) as the event/meeting begins and
 - Explains how the [technology](#) will work,
 - Introduces the Virtual Facilitator and Tech Support Facilitator and explains their roles,
 - Ensures all have the link to the cloud folder housing the agenda, rules, etc.
 - Asks everyone—virtual and in-person— to [avoid side conversations](#), so all can hear.

Hybrid Events and Meetings Facilitation - Dos and Don'ts

Do	Don't
Ask yourself, "Is this meeting really necessary?"	Do not hold a meeting that is not required
Keep meetings short and to the point	Waste time doing work in a meeting that can be done outside the meeting
Keep attendees focused	Do not allow the distraction of side chatter or conversations
Use the same cloud-based solutions for all attendees	Cause inequity by using one strategy in-person and another on the virtual platform
Use Ground Rules and share them with everyone	Exclude the virtual or in-person audience by sharing only the rules that apply to that group
Call on people by their names	Say, "Who has anything to add" or "Does anyone want to comment"

Ground Rules

Ground rules set expectations and ensure equity and inclusion of all attendees. The meeting or event Ground Rules should be available to everyone attending, so consider posting them early with the agenda or invitation. Good ground rules provide attendees with what they need to know, allow all to have an equitable experience, and ensure everyone feels included. Ground rules will vary based on your venue and the type of event or meeting your PTA holds, how many people you expect to attend, and the technology available to you. Your PTA should consider creating a ground rule for each of the items below if they apply to your event or meeting.

1. Recognizing Speakers:

- The size of your event/meeting and the technology available will play a role in your planning.
- Consider asking everyone to raise their hands (virtual or physical). The Virtual Facilitator can help. Consider alternating between virtual and in-person attendees.
- For smaller groups, go around the table. Create a list at the start of the meeting/event, then let everyone know in what order you will call on them. Let them also know it is fine to have no comment and pass.
- Ask everyone to identify themselves before speaking.

2. Muting and Unmuting:

- A good practice is a everyone on the virtual platform is muted throughout the event unless called upon to speak, and virtual attendees use the chat boxes if they have technical issues, can't hear well, need to step away for a few minutes, etc.
- If all virtual attendees are muted, so should all in-person attendees. That means a good rule is that no one speaks unless recognized, in-person or virtual alike.

3. Including Virtual Attendees:

- A **Virtual Facilitator** is a good practice. Their role should be defined in your Ground Rules. They ensure virtual attendees can see and be seen, hear and be heard, and participate. If technology fails, they can speak on a virtual attendee's behalf as they did in [Part 2](#) of the video training. They monitor the virtual experience, so no virtual attendee feels excluded.
- For smaller groups, consider assigning an in-person partner or surrogate for each virtual attendee. The in-person partner ensures the virtual partner hears, sees and is able to participate.

4. Technical Issues:

- Consider appointing a **Technical Support Facilitator** and include their name and contact information and define their role in the Ground Rules. This person must be comfortable using the virtual platform so they are able to work one-on-one with individuals having trouble.

5. Cameras:

- Successful hybrid events require everyone to see each other. If the in-person audience is on camera for the virtual audience to see, and your PTA is projecting or showing the virtual audience to the in-person audience, then ground rules should ask all virtual attendees to have their cameras on. This levels the playing field.
- Be sure to consider potential exceptions--a virtual attendee phones in, the device has no camera, the attendee is not alone and tuning the camera on invades another's privacy, for example—and clearly state them in the ground rules to set expectations.

6. Polls and Brainstorming During the Meeting:

- Attendee engagement is important. Plan for engagement.
- Make sure everyone attending uses the same tool. Do not use one strategy at the face-to-face meeting and one in the virtual space.
- Your Ground Rules should contain the link to the cloud-based tool, and an expectation that in-person attendees come equipped with an internet-connected device.

7. Brainstorming Before the Meeting:

- The best hybrid meetings are short and to-the-point. This keeps everyone focused.
- Reserve meeting time for motions, debate, and actions that must occur during the meeting and be included in the minutes.
- Seek member input and ideas outside your meeting, and give them the freedom to provide ideas, ask questions, and share opinions when they have free time. Rather than texts or emails—which are asynchronistic communications where parties can read and respond when they have free time—find a more organized and cleaner way to encourage this type of communication. Use this [asynchronistic brainstorming](#) to shorten your meetings and events and to get the preliminary discussions done before a meeting or event. Use a cloud-based document or spreadsheet for people to share thoughts or one of the many cloud-based brainstorming platforms available. An example of using asynchronistic brainstorming can be found in [Part 2](#) of the video training.

8. Voting:

- Your meeting size will influence how you vote. Plan carefully. Remember, only members of the group meeting (board for a board meeting, members for a general membership meeting, committee members for a committee meeting, etc.) are allowed to vote.
- Your PTA's ground rules should explain how a voter will be identified, and what system you will use to vote. Roll call vote? Show of hands? Voice? Will the Virtual Facilitator assist? All this should clearly be stated in the Ground Rules.
- PTAs should consider their potential need for a ballot vote and prepare. The link and process to be used should go in the meeting Ground Rules.

Where do I find more facilitation help and information?

Review the links in below for great videos and articles on facilitating hybrid meetings and events, cloud-based tools available, and checklists to help plan. Some of the articles are related to products but contain useful hints and ideas not related to the product. Some of the videos will include ads.

- [Guide to facilitating hybrid groups](#), overcome challenges, and strategies for engagement including two downloadable articles from Training for Change.org.
- [Guide to hosting hybrid meetings](#) from University of Wisconsin Madison. Set up checklist, in-meeting best practices, etc. Much of it applies to PTA although some is specific to the university.
- Markus Sepalla video, [Lead a Hybrid Meeting – 5 Techniques You Need to Know](#) (5 min) on basic tips to facilitate a hybrid meeting
- Link to short, [10 Helpful Hints to Run Hybrid Meetings Where People Actually Pay Attention](#) from Pigeonhole.com Live Blog.
- Link to comprehensive document on [hybrid board meetings](#) with general information about benefits, obstacles and best practices.
- Link to [How to Master Hybrid Meetings](#) with information on facilitation and tech to help. From the Harvard Business Review. Some tips are specific to businesses, but many work for PTA:
 - Article containing an overview of [how to run a great hybrid meeting](#)
 - Video [How to Have a Hybrid Meeting that Works for Everyone](#) (6 min)
 - Video [How to Do Hybrid Right](#) (10 min), expect ads
 - Article, [Do You Really Need to Hold that Meeting](#), with a great visual guide for making the decision