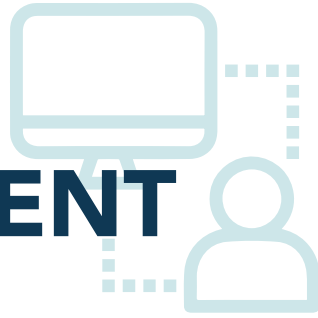


MINI-GUIDE FOR

HYBRID ENGAGEMENT



Hybrid community engagement utilizes a combination of in-person and remote features to achieve your project goals. They support a flexible and accessible alternative to an exclusively in-person or virtual engagement. Successful hybrid models will combine technology, like video conferencing or online surveys, with in-person activities. Balancing the combination of the different modalities is an important planning step because simply adding video streaming to an event will not, alone, create a successful hybrid engagement.

Hybrid models will be a key and necessary modality long into the future, as COVID-19 has shifted the way we engage across multiple industries (sports, education, entertainment, etc.). There is a growing expectation that both in-person and virtual options for participation will be guaranteed. While at first glance this may seem like a hassle; hybrid engagements can be an impactful tool for achieving your goals. Hybrid engagement can help expand your field, reach new audiences, and meet your accessibility and inclusion goals.

8.1 CHOOSING A HYBRID PROCESS

The first step in developing an approach using a hybrid model is to understand the best ways to build participation options into your plan. Explore how a combination of different modalities, such as phone or in-person, will help you achieve your intended goals and outcomes. Adding a remote broadcast option to an event might not meet your participation goals, but pairing an in-person session with a survey might help you reach a larger audience.

There are a variety of ways to develop and produce a hybrid engagement, but before planning you should determine which of the following category aligns with your purpose:

Hybrid Process

An engagement process offering multiple ways to engage through a variety of modalities, like offering in-person and virtual events at different times (instead of combining them). This means more touch-points over time, designed to support your engagement outcomes in different ways.

For example: A hybrid process could involve engaging stakeholders through a virtual event, an in-person event, a survey, and a signage campaign. It utilizes many different strategies, engaging more participants than would be able to participate in a singular event.

Hybrid Event

An event offering different ways to be present by pairing a limited in-person audience with a remote audience. Engaging two unique audiences at the same time is a balancing act and requires organizers to think about creating an engaging experience for both.

For example: A hybrid event could involve engaging a small set of participants in-person and another set of participants virtually, through tools like broadcasting or meeting software. It engages both sets of audiences at the same time and utilizes tools to promote cross-audience participation.

IN THIS SECTION

- [8.1 Choosing a Hybrid Process](#)
- [8.2 Planning a Multi-Pronged Hybrid Engagement Process](#)
- [8.3 Planning a Single Hybrid Engagement Event](#)
- [8.4 Checklist for Hybrid Engagement](#)



The following are some brief steps to support you in developing a hybrid model:

1. Ask yourself, "Would my engagement objectives be better met by adopting a hybrid model?"
2. Determine if a hybrid process or a singular hybrid event best meets your engagement goals. Take time to reflect on the key considerations below to help determine which model would best fit your goals and capacity.
3. Prepare for your engagement utilizing the suggestions in this mini-guide and other sections of the Community Engagement Almanac.

KEY CONSIDERATIONS FOR CHOOSING A HYBRID FORMAT

Generally, a hybrid process that layers multiple engagement opportunities is recommended. This increases accessibility and outreach, but, remember, don't plan to do it all. Use time and resources efficiently. Whether you are leading a one time hybrid event or multiple engagements, the following considerations will help you determine your format:

Evaluate accessibility & inclusion for participation.

A major benefit to virtual engagements is how seamlessly access and inclusion can be woven in. Features, like live captioning for those who are Deaf or Hard-of-Hearing, language interpretation, and time and movement flexibility for those who cannot as easily travel to your location, make virtual engagements more accessible to many. Unfortunately, virtual engagements are not a solution for all access needs, specifically those without broadband and/or computer access or those with lower digital literacy. Consider how you can utilize a hybrid model to offer targeted access to your stakeholders. A *hybrid event* can increase your accessibility but may not have as high a level of participation. A *hybrid process* will increase your level of inclusion, and you can tailor different engagement opportunities to reach specific audiences.

Determine if one event will meet your needs.

For engagements that require all participants to engage with each other, a *hybrid process* would hinder that type of collaboration. While splitting engagement events into remote, in-person, etc. might foster distrust, as participants may perceive a lack of transparency; they may want to know what was said and respond to others, which requires all participants to be present at the same event.

Work with stakeholders to find methods that align with their needs.

Different stakeholders may have different regulations around in-person or virtual activities. Consider their boundaries when planning your processes, ensuring you are working within their rules. For example, some partners may not feel secure using Zoom, while others may not allow individuals in their offices. Find a balance that fits everyone's needs.

CATALOG OF IDEAS

Use the [Catalog of Ideas](#) to select the right outreach methods for your hybrid engagements.



PROMOTE ACCESS IN YOUR ENGAGEMENT PROCESS

Not everyone has the ability to engage in the same way. Stakeholders may be short on time, unable to travel, need longer to digest content, or need access to content in other languages. By using a combination of engagement formats you can reach more stakeholders in more meaningful ways. Consider how to utilize a mix of formats to target different stakeholder groups. Review the [Mini-Guide for Anti-Oppression, Inclusion, and Accessibility](#) for more information on building access into your engagement.

Anticipate your team's capacity.

Hosting a hybrid event requires more staff, technology, and A/V equipment than you may have access to. You may not be able to meet your project goals with your current capacity. Consider how you can build capacity or adapt your plan by hosting two different events instead of a hybrid event.

- Can you foster authentic engagement between in-person and virtual audiences? If not, a *hybrid process* might be a better fit.
- Do you have access to, or will your audience have access to/ competency with software that promotes cross-audience engagement? Software that connects audiences who are in-person to those who are remote can be expensive and challenging to learn.

Identify how many stakeholders you hope to reach.

Hybrid models can allow you to reach a much larger audience through different channels and modalities for engagement. Many people may not be able to attend public meetings due to health concerns or lack of flexibility in their schedules. Utilize digital tools to offer stakeholders multiple ways to engage. Digital surveys or questionnaires can supplement an open comments section at a meeting. Virtual workshops can be paired with in-person discussions for stakeholders to engage over a longer period of time. Consider the different ways to reach an audience in order to achieve the desired outcomes, but be sure that if you are engaging across different modalities, you are designing each experience equitably.

Clarify the level of participation for remote participants.

For all hybrid engagements, there is an assumption that a part of the group is remote. Consider how to engage remote participants.

- Is communication only one way? If yes, then perhaps a broadcast type feature would work.
- Do you want remote participants to respond in real-time and be seen and heard by the in-person group? If yes, consider hosting two different events-- one in-person and one virtually, as hybrid events may not feel as equitable for the remote participant.
- Do you want virtual and in-person participants to engage with each other? If yes, then you may want to consider the technology capacity for in-person attendees.

Consider how attendee participation impacts your goals and how different modalities might be adapted to meet your needs. Attendance should not be confused with engagement!

Decide how much power you are willing to share.

While we never recommend 'gate-keeping' in community engagements, there is a certain amount of uncertainty in virtual events that may make a facilitator nervous. Instances of 'Zoom-bombing' or disrupters not allowing a conversation to continue can negatively impact your engagement. Low staff numbers could mean you may not have a staff member to observe or note-take in every breakout session. Consider how much responsibility you are willing to share and how different modalities might best support your intentions.



ENGAGEMENT SIZE

Engagement size will be one of the biggest attributes in planning a hybrid event. You may be able to have a large event if all stakeholders are simply watching and receiving information. You will want a much smaller number of participants if you are encouraging cross-attendee conversations.



CONSIDER VIRTUAL ENGAGEMENT FATIGUE

As workers increasingly rely on their computers for work, consider how adding another virtual engagement opportunity might impact their general fatigue. When engaging virtually, stakeholders may be more distracted and have a shorter capacity for long engagements. A virtual engagement cannot have the same agenda as an in-person engagement. Consider how audiences will interact and participate differently in-person versus virtually.

OPPORTUNITIES AND LIMITATIONS OF HYBRID ENGAGEMENT

OPPORTUNITIES	LIMITATIONS
<ul style="list-style-type: none">• Attendees can be more flexible in choosing how they participate in regards to time conflicts, access, transportation, internet connectivity, etc.• Providing more tailored options to stakeholders' specific needs will offer greater access and has been shown to greatly increase participation. Use captioning and language interpretation to further meet stakeholders' needs.• You can utilize a virtual platform to record, create transcripts, and download event chat. This can all be more easily analyzed together and improve record-keeping.	<ul style="list-style-type: none">• Instead of impromptu and serendipitous meetings, everything needs to be scheduled.• While a combination of modalities is still better than one, not all experiences are equal.• Participants may express a fear of invasive surveillance. Different platforms may track attendees. You will not have control over this, but consider how it might impact who attends.• Virtual attendees may feel left out or forgotten about. They will not be easily able to participate in small talk or light networking.• Virtual attendees may resent in-person attendees for their ability to get closer to each other while in-person attendees may be resentful of the time and flexibility of virtual attendees.

8.2 PLANNING A MULTI-PRONGED HYBRID ENGAGEMENT PROCESS

A *hybrid engagement process* differs from a *hybrid engagement event* in that different modalities for engagement are used over an extended period of time, instead of merging both for a single event. This could present as offering in-person and virtual events on different dates, or taking a multi-pronged approach to how you reach your audiences by using surveys, workshops, and virtual meetings. A hybrid process will mean more touch-points with stakeholders tailored to their specific needs.

DETERMINE MODALITIES FOR ENGAGEMENT

In building or adapting to a hybrid engagement plan, refer to [Part II - Tools and Assessments](#) in combination with the [Mini-Guide for Planning Engagements](#). To build a successful hybrid process, review your goals and identify how different modalities, or engagement formats, can help you reach those goals.

Generally, a longer engagement process will utilize multiple modalities of engagement. The trick with a hybrid process is being intentional about how you merge these modalities to offer stakeholders engagement opportunities that meet their comfort level. Take a multi-pronged approach to reaching your goals by offering different opportunities for stakeholders to participate.

When reviewing your entire engagement process, look for moments where in-person is absolutely necessary and moments where another method of engagement might be more appropriate or would work just as well. Review the [Find Your Format Tool](#) and then [Part IV - Catalog of Ideas](#) for inspiration on choosing different modalities.

IDEAS FOR A HYBRID PROCESS

- Host the same event twice; once in-person and once virtually.
- Post a link to a survey on your event marketing materials.
- Develop engagement events with the same agenda, but designed differently to meet the needs of specific audiences (e.g. hosting in different languages or one event with computers and another event tech-free).
- Create a newsletter to keep all participants informed of other engagement opportunities in your process. (They could help you promote through word-of-mouth.)



IN-PERSON, REMOTE, OR SMS/INDIVIDUAL EXPERIENCES AND THE SPECTRUM OF ENGAGEMENT

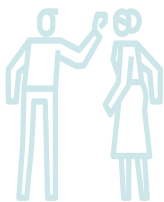
The following table outlines which type of activities are best suited for which format. When thinking about a multi-pronged approach, be realistic about what works best and in which **context to build a successful plan.**

	BEST FOR IN-PERSON EXPERIENCES	BEST FOR VIRTUAL OR PHONE EXPERIENCES	BEST FOR SMS / TEXT OR INDIVIDUAL EXPERIENCES
OUTREACH	One-on-one instruction for vulnerable stakeholders	Informational webinars or presentations (<i>especially where stakeholders can engage at their own pace</i>)	Informational campaigns on social media
CONSULTATION	Workshops that require supervision or facilitated instruction	One-on-one or small group interviews	Surveys, questionnaires, or other written feedback
COLLABORATION	Interactive or hands-on discussions or workshops	Small group discussions or meetings	
SHARED LEADERSHIP	Participatory events	Conferences	

Review the [Introduction](#) for details on the Spectrum of Engagement.

Use a combination of the formats above to plan an engagement process that flows across different levels of the spectrum of engagement. Think through how a combination of formats might better meet your engagement purpose and needs of your participants instead of one singular event. **REMEMBER: Not all formats work at every level of the spectrum.**

BEST PRACTICES FOR BUILDING YOUR HYBRID ENGAGEMENT PROCESS



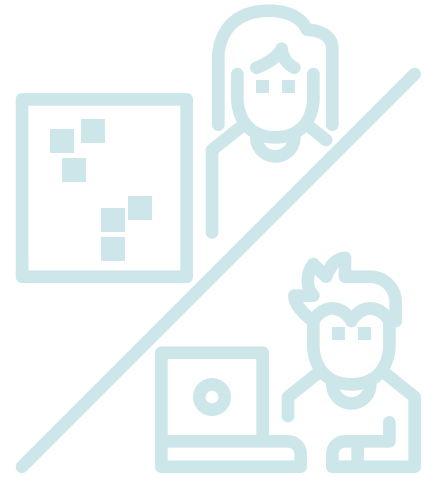
- Maintain transparency and flexibility with stakeholders.** Do not use the limitations of a global pandemic as an excuse for poor service. Instead, communicate with your stakeholders on how you are adapting services into a variety of models to be respectful of the current situation.
- Give stakeholders the opportunity to inform how to adapt a hybrid process.** Ask stakeholders to share their ideas and comfort level. This not only fosters their buy-in but gives you insight into some of their barriers to participation. For example, a stakeholder group you meet with regularly might be open to moving check-in meetings online while keeping workshops in-person.
- Remember your project goals, and be flexible in achieving them.** The current context will continue to shift, and you may need to adjust arrangements that are different from your usual models to ensure you are addressing community needs, in regards to certain deliverables, amount of contact hours, etc.
- Reflect on what works.** Offer stakeholders and your planning team the opportunity to reflect on what processes and modalities are working well. These experiences can be applied to later engagements. For example, you may find that using phone or SMS for one-on-one interviews instead of in-person meetings is effective, or offering a virtual workshop may not have been as successful as you'd hoped.

8.3 PLANNING A SINGLE HYBRID ENGAGEMENT EVENT

DETERMINING LEVEL OF PARTICIPATION OF STAKEHOLDERS

Take a step back and consider what the event experience will be like for each stakeholder. Imagine their journey through the event, what drew them there, what keeps them there? A key to planning a successful hybrid event is having a plan for how each audience will engage during the event and how different activities and platforms might help you achieve this.

When building the agenda for your hybrid event, focus on what kind of experience you want your stakeholders to have, and what kind of technology will be available to support you in achieving those results. Each distinct audience will engage differently in the experience. For example, if you hope to have many small breakout discussions, you must decide if you will keep all virtual participants to their own breakout sessions, or have small groups of in-person and virtual participants. If the former, consider a virtual facilitator to explain the activity rules, answer questions, and troubleshoot tech challenges. If it is the latter, consider what hardware and software is available to the group.



	EXAMPLE ACTIVITIES FOR HYBRID EXPERIENCES	HOW TO UTILIZE THE HYBRID MODEL
OUTREACH	Informational webinars or presentations	Stream online in front of an in-person audience.
CONSULTATION	Small group interviews / focus groups	Use technology, like table microphones and projectors, so all attendees (in-person and remotely) can see and hear one another.
COLLABORATION	Small group round-tables or meetings	Use technology built for hybrid meetings, and minimize distractions with a well-planned agenda. Keep all participants working together by using collaborative online tools.
SHARED LEADERSHIP	Interactive or hands-on discussions or workshops	Small breakouts keep conversations manageable between audiences. Use virtual tools like polling or chat through the phone to keep all conversations in one ecosystem.



PRACTICAL SOLUTIONS FOR HYBRID EVENTS

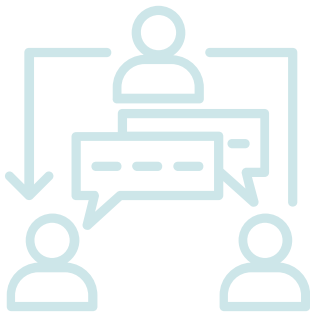
- Have a screen at each in-person table to encourage collaboration between stakeholders.
- Pair a virtual attendee and an in-person attendee for the entire engagement, and ask them to support each other's needs.
- Project the virtual attendees' videos on a wall so the speakers and in-person attendees can see and react with them. Conversely, make sure virtual attendees can see in-person attendees.

FACILITATING A HYBRID ENGAGEMENT EVENT

Facilitating a hybrid engagement can be more difficult than facilitating an exclusively in-person or virtual event as you have to adopt facilitation strategies from both formats.

Key Considerations for Facilitating a Hybrid Event

- **Have realistic expectations.** A hybrid event will be different. To make it work, you will likely need more planning, more resources, and more support staff. Have realistic expectations of your team's capacity and the capacity and comfort level of your stakeholders.
- **Be mindful of differences virtual and in-person audio and visuals.** An in-person speaker will likely have considerably more background noise than someone participating virtually. Consider how microphones or having a speaker talk directly into a computer might help accommodate the noise. Meanwhile, online you have the ability to mute attendees, but that is an impossible practice in-person. If you are on a microphone or close to the virtual microphone, be aware of what attendees can hear, that includes whispers, rustling papers, etc.
- **Plan ahead and rehearse often.** You may not be aware of sound, tech, or agenda issues until you have a rehearsal. Familiarize yourself with the virtual software tool, and test the blended interactions you hope to create.
- **Minimize distractions.** Those engaging virtually will not be able to participate in small-talk between transitions, get up to grab a snack, or view the room from a different angle. Consider if you how you might go about curbing these behaviors.
- **Define roles.** You may not be able to facilitate both virtually and in-person at the same time, so consider what supporting roles you can create to ensure each audience has a full and thoughtful experience. This may mean having both audiences watch the same speaker panel and then using different facilitators for follow-up activities or discussions. **TIP:** Each breakout could benefit from a facilitator, note-taker, and tech support person; you can assign these roles to staff beforehand, or ask participants to volunteer for roles like note-taker.
- **Honor emotions and trauma.** Facilitating a hybrid event can be difficult, but so can attending one. Be transparent about why a virtual event was necessary. Honor the efforts both audiences are making in order to participate and how the impacts of the current context are still evolving. Leave space for grace and patience, and acknowledge the emotions of stakeholders. Foster an environment where participants can check-in with one another and take frequent breaks for moments of reflection.



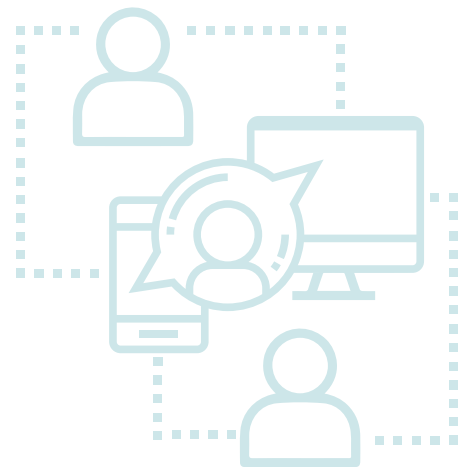
INCORPORATING ARTS AND CULTURE INTO HYBRID ENGAGEMENT

Storytelling is the perfect cultural connection point for a hybrid event. Using storytelling to promote conversation works by supporting setting expectations, creating norms, and reinforcing conversation structures that are easy for all attendees to follow. Storytelling is a highly engaging activity that can work to combat 'Zoom Fatigue.' Check out [this resource](#) from Wired magazine for community storytelling strategies.

For more information on arts and culture, review the [Mini-Guide for Planning Engagements](#).

BEST PRACTICES FOR BUILDING SINGLE HYBRID ENGAGEMENT EVENTS

- **Foster engagement between in-person and virtual audiences.** It can be challenging to make the two audiences feel connected. Encourage interaction through *gamification* (applying traditional game-playing elements to other activities), networking, or opening a shared platform for chat between the audiences. Small group discussions, virtual hangouts, and other lightly facilitated activities can help foster cross-connection. Remember to prioritize making your virtual audience feel included.
- **Tailor content for both in-person and virtual audiences.** Consider how a presentation might look on a smaller screen or how a handout could be used in hard copy as well as digitally. Taking in content on a large screen or monitor is quite different than on a laptop, so consider text, video, and imagery that will translate well across platforms, including smartphones.
- **Use software that can engage both audiences.** Have software that in-person attendees can use on their phones that can bridge the gap between audiences. This means having all attendees use the same chat platform or polling tool.
- **Content length and breaks are different for each audience.** In-person and virtual audiences engage differently; the distractions and needs for both can be challenging to manage. In-person attendees need longer breaks, while you may lose virtual attendees if a break is too long. Long keynote sessions work when your entire audience is together in-person, but for a hybrid event, you may want to offer shorter, digestible content to keep your virtual audience engaged.
- **Celebrate how hybrid events are positive for all participants.** Focus on how stakeholders can benefit from the experience, rather than what makes it challenging.
- **Host presenters virtually and in-person.** In order to illustrate equal weight to all participants, find a balance between in-person speakers, and those presenting virtually.



8.4 CHECKLIST FOR HYBRID ENGAGEMENT

Choosing a Hybrid Process

- Do we have the capacity to meet the different needs that hybrid engagements require?
- Have we identified how different stakeholders might engage differently in hybrid opportunities?

Planning a Multi-Pronged Hybrid Engagement Process

- Have we determined which modalities will support our engagement goals?
- Have we identified which stakeholders we hope to engage through different modalities?

Planning a Single Hybrid Engagement Event

- Have we determined the level of participation of stakeholders?
- Have we ensured we have the correct technology to meet our needs?

SOURCES

Forbes. [The Unintended Consequences of the Hybrid-Work Model.](#)

Public Input. [How Hybrid Public Meetings are Reshaping the Future of Public Engagement.](#)



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TYTHEdesign provides social impact strategies that help build the capacity of government, nonprofits, and foundations to foster healthy communities and resilient cities.

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