ICOMOS

international council on monuments and sites

Responsible Meetings & Events Checklists
Hybrid Meetings Checklists

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Hybrid Meetings Checklists

Hybrid meetings may be the most carbon friendly way of organising meetings/events for ICOMOS. However, hybrid meetings are more complex than online or in person meetings. They are easy to do poorly and hard to do well. Hybrid meetings require similar organisation to 'In-Person' meetings and 'Online' meetings, to make sure they function well and provide a similar experience to all participants, with online participants visible in the meeting room on screen and enabled to ask questions to the meeting.

In general, hybrid meetings will work best if the organisers focus equally on the needs of the remote participants to those attending in-person. Potential loss or disadvantages of not being able to be physically present needs to be carefully considered and addressed. To support inclusion and belonging all meeting attendees need to be considered and supported with equal priority. Online meetings allowing interactivity are especially good for giving participants equal opportunities. The several checklists that are provided as part of this Tool may assist you in planning and organising hybrid meetings.

Structured to address the four important roles involved when organising a hybrid meeting:
The meeting host/ organisers
The technical host/support team
The online/remote participants
The in-person participants

It sets out considerations to be made pre-, during- and post event stages requiring different considerations and activities. The checklists also allow you to add comments/notes that can support your later reporting and the organisation of future events.

The **meeting host**, whether this is a team or one person, has the overall responsibility for hosting a successful hybrid meeting. The organisation of hybrid meetings however requires the capacity to handle the technical dimension. While big events with a large budget may have a **technical host / support team**, in smaller events the host will also need to cover this function. The success of a hybrid meeting will however also rest on the active and considerate engagements of both the **on-line** as well as **on-site participants**.

The following checklists for hybrid meetings address various aspects of an event of relevance to the objectives of social inclusion and environmental concerns and addresses what can be done throughout the event planning and organisation including invitations, visibility, interactivity or audibility.

Make sure to also make use of the Checklists for in-person meetings (Appendix C), and consult supporting resources where available.

1.	Objective and TOR	Roles	Deadlines	Notes
1.a.	Are there mandatory Terms of Reference for holding this meeting? This can be checked with the Secretariat.			
1.b.	Clarify the objectives of the meeting. Think about each participant and what they should contribute. Decide whether an online or hybrid meeting is the way to go.			

2.	Date and Time	Roles	Deadlines	Notes
2.a.	Where participants come from a wide range of time zones, choose the day(s) and time(s) accommodating as many as possible. Check dates against public/religious holidays and ICOMOS calendars.			
2.b.	Consider parallel- and multi-sessions to allow people from a wide range of time zones to participate.			
2.c.	Consider the needs of participants having to travel to and from the venue. Check public transport availability and timetables, so that the event does not end at a time where it could be unsafe to leave the event			
2.d.	Record the presentations for relaying to each time zone session.			
2.e.	Consider the needs of participants having to travel to and from the venue. Check public transport availability.			

3.	Invitation	Roles	Deadlines	Notes
3.a.	In the registration form make an option to indicate whether participants would like to attend on site or online.			
3.b.	Use the registration process to poll relevant / current issues.			
3.c.	Finalise the registration process before the event starts. If registration is completed at an early stage, it is possible to determine how many have decided to use the online platform and how many people will be on site. This information is relevant to determining the facilities and capacity needed to host the online and onsite participants.			
3.d.	Share the agenda and event information well in advance of the meeting. • Make sure all documents are available electronically. • Online participants need relevant links and password(s). • Share ICOMOS Virtual meetings protocol for participants			

4.	Location and venue	Roles	Deadlines	Notes
4.a.	Select a venue that is considered "sustainable". To guide this choice consult C. Physical meetings in this Tool			
4.b.	Make sure the location/meeting room(s) has or can accommodate the technical equipment needed to organise a hybrid meeting. (See Visibility and Audibility below)			
4.c.	Relevant questions: What equipment is needed? Will all supplementary material be available on time? If not, where and how can this be organised?			
4.d.	Check how many people plan to be present in the room and make sure this is in line with relevant health, safety and security regulations.			
4.e.	The equipment needs for audio and video may be larger than for on-site meetings. More space may be needed to place screens, video cameras and microphones. Extra space and people may be needed for managing devices and technical equipment.			

5.	Online platform & virtual meeting room(s)	Roles	Deadlines	Notes
5.a.	Identify the appropriate online / virtual meeting software. Zoom and Teams are often used but there may be national or other restrictions that require careful consideration of which meeting software to apply.			
5.b.	Identify appropriate meeting format. Use a meeting rather than a webinar format with equal opportunities to engage in the sessions and discussions. Online meetings allow interactivity and provide knowledge about the other participants, whereas the webinar format does not.			
5.c.	Book a virtual meeting room. (PS: ICOMOS Secretariat has a professional subscription to Zoom, which can be made available upon request. Up to five channels can be used at a time. See ICOMOS Zoom meeting tutorial)			

6.	Technical considerations	Roles	Deadlines	Notes
6.a.	Assign a technical host/support to help with technical issues if you are organising a larger meeting.			
6.b.	Meet the technical host/team ahead of time to go through the flow of the meeting. Decide who will do what, and when.			
6.c.	Check in advance what equipment is available in the room and that it is working. Make sure you know how to use it.			
6.d.	Make sure you have a good internet connection and that there is a backup host in case of a disruption.			
6.e.	Organise a test run with the presenters/ speakers who will participate remotely and in-person at least a week before the event to check any technical issues and go through the program who will do what, and when.			
6.f.	Make sure the technical host/support team is available to tackle technical problems at the start and during the event. For smaller meetings when the meeting host also serves as the technical host, make sure to have a backup host in case of a disruption.			
6.g.	Make sure the technical host/support team is available to tackle technical problems at the start and during the event. For smaller meetings when the meeting host also serves as the technical host, make sure to have a backup host in case of a disruption such as power and/or bandwidth failure.			

7.	Sharing and interactivity	Roles	Deadlines	Notes
7.a.	Make sure all participants are able to read and understand what is communicated. Make sure to explain abbreviations. Translation and transcription may be required and always desirable.			
7.b.	Agree which presentations can be recorded and/or shared during/after the meeting.			
7.c.	If documents are to be circulated avoid printing and consider using document sharing facilities to reduce email traffic (and therefore carbon usage).			
7.d.	If flip-charts or whiteboards with content are created during the meeting make sure these are shared with online participants and that they are saved and distributed as a useful record of proceedings.			

8.	Budget	Roles	Deadlines	Notes
8.a.	Make sure that costs associated with both the physical as well as online dimension of the event are covered by the budget. Relevant questions: • Have the costs for technical equipment been considered? • Have the costs for staff of technical equipment been calculated ? • Have the costs for the rent of the place including infrastructure (furniture and technical equipment) been considered? • Are costs for catering calculated? • If the event is outside 0900 - 1700 hrs, local time, have overtime /potential additional costs been budgeted for? • Is the event insured?			

1.	Start of the meeting	Roles	Deadlines	Notes
1.a.	Welcome everyone, acknowledging the different ways everyone is present. Include a moment at the start for informal interaction.			
1.b.	Present the objectives of the meeting, be clear about the purpose and the desired outcome.			
1.c.	Guide participants through the meeting agenda: present the people who will speak and introduce the technical host (if applicable). It is important that those having technical issues know to whom they should address requests for assistance.			
1.d.	Provide time for preliminary announcements, etc.			
1.e.	Outline the communication and participation process during the meeting and explain how to use the chat, the raise hand function, etc. Relevant questions: Will interruptions be allowed; will questions be continuous / banked until the end? See ICOMOS Zoom meeting tutorial			
1.f.	The chat function provides a benefit within the online environment compared to in-person meetings where people need to speak one at a time. The chat function can be leveraged for information sharing, questions, etc. in real-time. Present comments and questions of all participants. In most cases, the chat thread can and should be saved and referenced later if needed.			
1.g.	Consider the benefit of recording the event to considerations for not recording the event. If you want to record the event, ask for the permission to do so. Alternatively inform how to accommodate those objecting to be recorded. Meeting recordings can also be saved both for the record and to inform those unable to attend in real time.			
1.h.	Start the questions & answer session with remote participants, but then alternate between online and on-site participants.			
1.i.	End the meeting 5 to 10 minutes before the hour to give people a break and avoid back-to-back meetings.			

1.	Self reflection	Roles	Deadlines	Notes
1.a.	Make recordings and presentations available after the meeting.			

1.	Visibility	Roles	Deadlines	Notes
1.a.	Decide on the appropriate camera principle is appropriate: one-person-one-camera OR a few cameras in the room. Have at least one webcam to record the room with all the participants.			
1.b.	Have at least one laptop for the presenters. Make sure to have a backup of the presentations.			
1.c.	Installing extra cameras will enhance the room overview and inclusion of online-participants. Distribute cameras across the room so that online participants can follow any discussion.			
1.d.	Make sure both on-site and online participants can view the presentations. Ensure that online participants don't feel like distant observers. Whoever in charge of screen sharing should continually ask themselves what participants need to see during the meeting.			
1.e.	Have a room camera to follow / zoom in to speakers.			
1.f.	Give online participants a presence in the room. Have at least one large screen where all online participants and presentations are visible. When only one screen is used, show online participants in-between the presentations. Position the screens/monitor(s) so that all on-site participants have a good view of them. Make sure that the speaker will also have a monitor where s/he can see the online participants.			

2.	Audibility Linguistic accessibility	Roles	Deadlines	Notes
2.a.	Support translation and transcription as agreed with the meeting host.			
2.b.	Organise microphones for the speakers. Make sure an appropriate number of microphones are available.			
2.c.	Installing extra cameras will enhance the room overview and inclusion of online-participants. Distribute cameras across the room so that online participants can follow any discussion.			

3.	Contingency	Roles	Deadlines	Notes
3.a.	Discuss the flow of the meeting with the host in advance (some 2 weeks before the meeting).			
3.b.	Ensure a test run is made ahead of the meeting (e.g. 1 week before the meeting as well as just ahead of the meeting.)			
3.c.	Have a plan/procedure for communicating if problems arise during the meeting.			
3.d.	Prepare for all technical issues that might occur and discuss your plan/ procedure with the host in case of problems.			

b Checklist for technical support | During the event

1.	Support for participants	Roles	Deadlines	Notes
1.a.	Make sure the technical equipment for audio and video is functioning and that the internet connection is stable.			
1.b.	Have a good overview of the equipment and make sure you are close enough to react to problems identified by the host.			
1.c.	Make sure faces of the panellists and current speakers are visible to all.			

c Checklist for technical support | After the event

1.	Follow up	Roles	Deadlines	Notes
1.a.	Document what worked and could be improved for organisation of future meetings.			

a   Checklist for participants | Before the event

1.	Preparation	Roles	Deadlines	Notes
1.a.	Read ICOMOS Virtual meetings protocol for participants			

b   Checklist for participants | During the event

1.	Preparation	Roles	Deadlines	Notes
1.a.	Close any distracting programmes.			
1.b.	Join from a quiet area to avoid distracting noises.			
1.c.	Use an ear-set to screen contextual noises.			
1.d.	Turn your camera on so that all can see you. Only switch off the camera if you have connection issues.			
1.e.	Turn your microphone off when you are not wishing to make a comment.			

b   Checklist for participants | After the event

1.	Follow up	Roles	Deadlines	Notes
1.a.	The meeting will be recorded. The video and audio files, as well as the transcript of the chat box can be made available to participants by contacting the Secretariat OR the meeting/ event host.			

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