Case Study: Facilitating 'hybrid' offline/online events

A conversation with Orla Cronin, Lead Trainer, ICA:UK

Orla Cronin is a lead trainer with ICA:UK. She met up with ICA:UK Board Member, Savita Willmott on Zoom to discuss a recent virtual event run as a 'hybrid' meeting.

Bruce@legophotofy.com

Savita: Hi Orla! It's great to connect and speak with you today about your recent experience. Could you start by telling us a bit about the client and project you worked with?

Orla: Hi Savita! Lovely to speak to you also. I'd like to tell you about an event we ran with the Wikimedia Foundation, an ICA:UK client. Myself and facilitators Ann Lukens (ICA:UK) and Kayla Schnuelle (ICA:USA ToP Network), supported by Jonathan Dudding (ICA:UK), had been supporting 9 Wikimedia Movement working groups to meet virtually since Autumn 2018. The groups included representatives from the Foundation itself, plus representatives from the global group of volunteers, affiliate groups and user groups. Each group ran fortnightly,

supported by the same facilitator for almost a year. The aim for the groups was to deliver a set of 2030 strategy recommendations to the Wikimedia Foundation Board in Spring 2020.

Could you tell us more about the event, and why it was run as a 'hybrid' meeting?

Hybrid meetings can be immensely valuable if they are approached creatively. Meetings can include several face-to-face groups in separate venues, individuals logging in to a face-to-face group, a remote facilitator working with a face-to-face group – there are myriad possibilities, but they do all require the investment of some resource or staff capacity to run the process, and some thinking about the design in advance.

In the case of the Wikimedia groups, the Foundation had agreed to support one or two face-to-face meetings per working group, to help groups build relationships, and dive deep into their work to make rapid progress. Unfortunately, logistical challenges meant that two of the twelve members were unable to secure visas to attend the three-day face-to-face meeting of the 'Roles and Responsibilities' working group in Utrecht, Netherlands. These members were enormously committed to the working group, had set aside the time, and were understandably frustrated at finding themselves unable to work live with their team to progress their group's recommendations. We made a clear commitment to engage them virtually, in parallel to the live meeting.

They were far from convinced that it would work - one of them said: *"Honestly speaking, I didn't expect much when it was decided to arrange remote participation!"*

I'm a great believer in 'hybrid' meetings, as I think they can generate real democracy and participation. However, they are often not as productive as they could be. The conversations are often led, and dominated, by the live participants, with the remote folk dialling in simply to listen. That approach can work for socialising ideas and keeping people up to date, but it is not optimal for deep collaboration. It also tends to be the same people or organisations who attend remotely over time, leaving them more at risk of being left out of genuine participation.

So I gather you conducted a virtual meeting at the same time as the face to face meeting? How did you integrate the two elements?

We set out to conduct a single meeting with multiple channels of communication, and we achieved that. The single most important ingredient for success was that I designed the meeting to include a remote facilitator working with the remote participants, whilst I worked simultaneously with the live participants. I was lucky enough to be able to engage two very experienced ICA:UK facilitators – Martin Gilbraith and Dawn Williams – who took turns

facilitating the remote participants over the three days. We also had a representative from the Foundation (not a formal member of the working group), linking the two discussions by transferring material from the virtual meeting into the live room, and from the live room to a document that was visible to the remote participants. So, we had an explicit plan for catalysing and eliciting input from the 'remote' participants, and a plan for integrating that material into the 'main room'. Basically, the remote 'Zoomies' and the live 'Roomies' were in communication with each other the whole time, whether in plenary or in small groups.

This meeting included a number of focused conversations and two very significant consensus workshops, from which the draft strategic recommendations emerged. Martin and Dawn supported the 'Zoomies' to engage in the meeting tasks to the same extent as the 'Roomies,' and ensured they understood the instructions at each stage of the workshops. Along with the link person, the facilitators made sure that material provided by the remote participants was written up and brought into the material in the 'main room' in real time. For example, Consensus Workshop involves generating insights, clustering them and then developing titles for the clusters. The insights from the remote participants were transcribed and placed on the wall. Remote participants were given several clusters for which to develop titles, and were paired or working in small groups with people within the 'main room' for much of the time.

We encouraged the 'Roomies' to take it in turns to 'carry' the 'Zoomies' around 'inside' the laptop as needed, for example when we were reviewing post-its on the walls. . Apart from making it easier for the remote participants to see and hear, this created a really visceral sense of their presence, albeit slightly disembodied! Having them 'sitting on the laps' of the Roomies helped invite ongoing participation (including in lighthearted banter, which we explicitly encouraged, to help build the sense of connection and inclusion).

For plenary sessions, including for presentations, slides were shared within the Zoom meeting, and then the Zoom meeting was projected on the wall. This meant that remote participants could see and hear the presentation clearly.

It really helped that the facilitators were a tight knit team who shared a common language of the Technology of Participation. The meeting design had a relatively straightforward 'arc,' which supported the remote facilitators to anticipate what was coming next, even if we went slightly off script at times. This enabled them to ensure that the Zoomies could participate fully, and it meant that we were able to keep the groups in sync at the different stages of the tasks.

As Martin and Dawn and I already knew one another, we dropped very rapidly into easy teamwork and smooth communication. Our own discussions took place on a "back channel" using the 'Telegram' app. This helped us keep track of where everyone was in the process, as

well as monitor group energy levels. The working group members also interacted with each other on Telegram as well as by voice (we reserved Zoom chat for conversation between the remote participants and their facilitator). There was quite a buzz!

"The active and helpful coordination ….to update [us] about everything happening ..and engaging [us] in a major exercise and decision making processes was surprisingly effective." Remote participant

It sounds like it required a lot of technology?

This kind of process doesn't necessarily require a lot of elaborate technology. All the participants were very familiar with the channels we were using. We used Zoom as the remote meeting platform, and used the laptop's built in speakers and microphones. We shared live presentations from visiting consultants with our virtual participants using Zoom, and so were also able to get recordings of some really valuable presentations and discussions, by just hitting record within Zoom. In future I would also invest in a Bluetooth speaker and microphone – as it was sometimes difficult for the remote participants to hear the live discussions clearly - and I would ensure a spare, dedicated laptop was available (as we ended up commandeering the laptop of the link person for the whole of the three days).

It all sounds great – what were some of the difficulties or pitfalls you experienced?

One challenge was keeping everyone 'in sync'. Working with international participants brought some time-zone issues, and so we had to work with people's fluctuating energies. By keeping a really close eye on participants, our remote facilitators were able to support them and help them catch up as needed, for example by occasionally taking individuals into virtual breakout rooms to update them while the others concentrated on the main room. Sometimes the remote participants moved faster than the live group – partly because they were typing rather than writing, and also due to the fewer voices in their small group.

Our second challenge was that the internet was not as good in the room as we might have hoped (we checked upload and download speeds in advance, but since then, I always make sure I do a 'latency' check too, i.e. how frequently the connection drops). I think it's really important to manage expectations around a 'hybrid' meeting like this. Our contingency plan was that the meeting would split into remote and local, and we would pull material back and forth using a Google document if we couldn't communicate effectively directly. Without the remote facilitators, we would have had to abandon the remote participants to their fate on the occasions where our local wifi became flaky!

In future I would also invest in a producer (in the face-to-face room, ideally). This would free up the link person and provide extra technical support for recordings and assigning breakout rooms.

As ever, with any successful process, great credit goes to the remote participants who overcame their frustration and scepticism to take such an active and diligent part in the meeting, and to the face-to-face participants who looked after the remote participants and sought opportunities to pair up with them. The result was some really great recommendations for the Wikimedia 2030 Strategy.

"Remote participation gave me flexibility in participating, and to use technology…like drawing the organisational structures and feeding it live… viewing and editing the work products in real time. This creative strategy… surprised me." Remote participant