Hybrid Open Space Event Organiser Checklist
What to remember when planning or hosting a hybrid Open Space Technology Event

Preliminary Considerations:

- **Hybrid or Semi-Hybrid:** What is appropriate for our purpose? How to bring 2 worlds together?
- **Appropriateness** – Is Open Space right for our purpose and needs, with a clear theme?
- **Theme** – Is there a clear focus, and pressing need, but with sufficient room for imagination?
- **Type of Event** – internal? Public? Commercial? Number of participants, general expectations
- **Organisers** - Who is the organising team & sponsor? Determine roles. Support team – roles?
- **Participants** – Who are potential participants, who are stakeholders and other affected persons
- **Backbone** – The backbone of a hybrid event should always be online (e.g. on QiqoChat platform)
- **In situ** – a parallel set up created in physical space, with main room and breakouts
- **Marketplace and Tools** – accessibility both online and in-situ, how connected
- **Movement** – participants move themselves in QiqoChat, then physically in real space too
- **Conversation** –through laptops or large conference screen, who, where and how.
- **Spatial requirements** – build-in extra space (tables) for technology team, incl QiqoChat table
- **Time** – Has enough time been allotted to achieve purpose (1 – 3 days)?

Pre-Event

- **Event Date** - Determine date, duration and start time (how world time zones affect schedule)
- **Event promotion** – Type of publicity, Target audience, means of promotion
- **Invitation** - Does it evoke participation (frame as question)? Clear place, time & participation
- **Call to Action** – Design clear invitation with clear link to registration, send out
- **Online platform** - Default *QiqoChat* (designed for OST), is there need for different platform?
- **Booking platform** (Eventbrite?), budgeting, cost, ticket price
- **Platform Draft** – First simple draft of Event platform page, operational for teams
- **Schedule:** Number and lengths of sessions, probable number of breakout spaces desired
- **Post Event** – What post event follow up is needed, return to space or shift to Community?

Technological Requirements checklist (physical technology in situ)

- **Cameras** on tripods to cover all angles of the active venue to project main space into Zoom
- **Lighting** to cover all parts of the active venue, including break-out rooms
- **Projector & Screen**(s) to project Zoomies in Zoom into the live main room space
- **Speaker**(s) for the main room and for each breakout room
- Roaming **mics** and presenter mics for the main room
- **Sound and video** mixing equipment to manage various activities
- **360^0 Owl cameras** with mics, one for each breakout room
- **Back u**p equipment to manage glitches
- Miscellaneous **video/audio** cables, ethernet ports, power extensions
- **Zoom or video software** integrated with the mixing equipment
- An **online platform** enabling online participants to move around freely (e.g. QiqoChat)
- **Online shared collaboration tools** (Google docs, Sheets, Boards etc.) ideally to work offline too
- **Clear instructions**, both in articulation and easy accessibility, for participants
- Enough **bandwidth** in the venue to cover all the requirements from a technology perspective, as well as additional bandwidth to cover facilitation and participant needs (laptops, smartphones)
- **Back up plan** in case of major technical failure (e.g. power cut, drop in bandwidth etc.)

Online Platform Design (QiqoChat)

- **QiqoChat** – Closed (registered), restricted or open event, ease of access, security
- **Accessibility Needs** – IT literacy, connectivity, impairments, translations, other needs
- **Platform Sign-in** – need, ease, registration lobby, pre-event access, participant photos?
- **Event Flow** – Set up initial of QiqoChat tracker, clarify overall design needs
- **Main Room** – Designed as welcoming space with clear orientation & navigation, OST principles
- **The Market Place** – Design of Agenda wall (topic, convenor, place / time), tools (Xcel, Miro,….)?
- **Break out Rooms** – number of rooms required, what tools required for each, naming
- **Other Spaces** – What other rooms needed (networking, relax, gardens, playground, exhibits….)?
- **Technical Support** – Separate room? Hotline? Support tools? What tech support arrangements?
- **Newsroom / Announcements** – What arrangements (notifications, separate tab in main room)?
- **Props / Photos** – special requirements for rooms, tools, audio-visual, photos etc
- **Tracker** – Develop tracker and sequencing for event, refine and update
- **Output** – Shared live tools for note-taking, record-keeping and process – see Output (below)
- **Spares** – spare rooms (hidden), spare docs or spaces, back up materials where appropriate
- **Labelling** – Clear Room, topic, Tab, navigational labelling to avoid disorientation
- **Registration** – Clear functioning link between registration (& payment) and QiqoChat access list

In-Situ Event Space Design

- **Main Space** – Is the main space large enough for participants to sit comfortably in a circle?
- **The Wall** – Is there unobstructed wall wide enough for all to stand in front of and read board?
- **Other Spaces** – Are there enough breakout rooms, or is there enough room in main space?
- **Building Management** – are they aware participants will be moving around a lot?
- **Food and Drink** – Apart from meals is there a coffee/tea table with snacks?
- **Output** – Report forms, flip-charts and other record-keeping tools – see Output (below)
- **Newsroom** – Is there enough space for (a) table(s) on the side with laptops for entering reports?
- **Supplies and Equipment** – are necessary supplies available (any special requirements)?
- **Accessibility**, disabilities, amenities, translators, transcribers, other special requirements
- **Furniture** - portable foldable chairs, free of furniture, table for food, newsroom/computers)
- **Filming Equipment** - Space for technological requirements, incl mixing control panel table
- **Bandwidth** sufficient? (for BOTH technical team AND participant laptops/smartphones)
- **Refreshment** – Allowances for breaks, incl for food and drinks, considered in scheduling?
- **Caterers:** Food and refreshments (incl. vegetarian/vegan, dietary needs), coffee/tea table, snacks
- **Equipment** and materials for participants – are microphones, laptops, printer, scanner needed?
- **Post event** - arrangements for cleaning up at end and for party, for example, restaurant or bar?

Staff Requirements & Roles

Staff

- A technical crew to manage all the equipment and movements
- A technical production manager to oversee all aspects
- A number of helpers to ensure the technical requirements for each breakout rooms are met
- Online technical support person from the facilitation team
- Lead Facilitator and Lead Support Facilitator for online and in-site
- Team of support facilitators to help with the participants' needs, and support the main facilitator

Created for Hybrid OST by François Knuchel at http://open2flow.co.uk

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Roles

- **Event Designer** (both in situ and online platform holding the pieces together (e.g. QiqoChat)
- **Lead Facilitator,** who normally runs the show online (backbone) but from in-situ position
- **Deputy Lead Facilitator,** who facilitators the in-situ proceedings, aligned with Lead Facilitator
- Support facilitator(s) or helpers (facilitation team), including time-keeper
- Online Platform **Technical Support** (helping participants with online technology)
- **Producer** keeping all the parts together (liaising facilitation with technical)
- **Lead Technician** who leads the technology team
- Technical supporters (technology team) operating cameras, mics, lighting, mixing, Zoom link
- Bridge builder(s) connecting the various cohorts (optional)
- Visual designer & curator (optional) and/or Audio-visual specialist (optional)
- Possibly Graphic Facilitators / Recorders (optional)
- Translators, interpreters, Access specialist(s) (optional)
- Other specialists and additional helpers may be required depending on the needs of the event

Pre-Event Interaction

- **Registration Deadline** - Early Bird, Full price – make sure participants register on time
- **Participant pre-briefing** - preparing participants for event, expectation, reading, preview
- **Consultation with support teams** – does everyone understand process, incl. joining in?
- **Producer / Facilitator requirements** – ensure facilitators have all they need, special room?
- **Technical Support Needs** – make sure technical support have full access, check needs & role
- **Reminders** – Send out reminders and check out messages to participants
- **Participant Contact** – available via QiqoChat profiles (no email address displayed), networking
- **Team Briefing** – Arrange training for all from hosting admin team, familiarise with QiqoChat
- **Pre-Event Party** – Encourage participants to visit site to familiarise themselves with navigation

Human Interaction Flow:

- **Offline Participation** – Consider how the 2 worlds could interact with each other at each stage
- **Engagement** - Be very clear about how engagement is achieved stage by stage
- **Visibility** - Both zoomies and roomies need to be seen and heard all the time
- **Free movement** - Design so that everyone can move around freely and actively participate
- **Flow** - Step by step design flow of conference needs to be briefed properly to all support staff
- **Scripts -** This includes a clear script of proceedings that all can refer to
- **Timings** - Careful planning of timings, including breaks (different needs in-situ and online)
- **Power** - Careful handling of power imbalances (facilitators needs to be aware of own tendencies)
- **Check-ins** - Periodic checking-in and sharing of how people feel in the different cohorts

In-situ Non-technical Materials checklist

- **Flipcharts**, pens, cards, sticky notes, masking tape, post-it notes, sticky labels, scissors
- Plenty of **paper** and colour marker pens for announcing sessions for the bulletin board
- **Posting**: Masking Tape (easier on walls) or Bluetac/Whitetac (check with venue if allowed)
- **Session Output** Sheets (pre-printed): Title, Convener, Participants, Discussion Notes, Actions
- **Laptops** connected with WiFi codes or local network
- **Microphone**(s)? / Projector? / Printer / Scanner / plenty of sockets and extensions if necessary
- **Tibetan chime** / singing bowl or similar gentle but audible sound to denote session finish / starts
- **Welcome**: Make the space warm and welcoming... plants / flowers?

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Event Output

- **Output Format**: determine desired outcomes, format for any output, how to capture important information from sessions, and how to ensure it happens (quality in designing in the outputs in advance determines quality of reports and other outputs). Options for session outputs:
- **Session Output A4 Sheets** for hand writing basic reports of sessions (plus any actions)
  - Minimally should have: Session Title, Space/room, Host, Participants, Key points/actions
- **Large paper sheets** (or flipcharts) for pictorial notes, mind maps, flowcharts etc.
- **Notes:** here possible participants type Output Sheets into Wiki in breaks during day (helpers?)
- **Online 'Wiki'** type page, GoogleDocs or similar for direct input into a shared space
- All **online materials**, reports etc will stay online for them to access and read/edit notes indefinitely, or in Circle / Community room.
- All **in-situ harvesting** documents to be uploaded in QiqoChat Report Room after event too
- **Digital photos** or scans (if A4) of session output sheets, uploaded directly
- **Video summaries**, audio recordings (with tweet updates or other social media if relevant)
- **Alternative Notetaking** – have other notetaking tools available on request
- **Output / Reports Room** – Google/Etherpad/Miro etc, visual recorders, Zoom recordings? In-situ notes or harvesting documents to be digitalised and posted in this room after event

The Event

Venue Set up

- **Breakout** (session or workshop) spaces (portable chairs)
- **Signage** (for sessions: 2 per session, 1 for work space, 1 for marketplace bulletin board)
- **Refreshments** area - food taken care of?
- **Registration** desk / participant welcome as required
- Arrange or check **layout of chairs** - leave plenty of space between circle and market place, between concentric circles of chairs, and gaps (aisles) to move in and out of circle.
- Set up **market place**:
  - **Bulletin board** (agenda wall – with session schedule table)
  - **Announcements**, community news or similar information sharing spaces
  - **Space** for session outputs
- **Technology team** to set up using own protocol, testing and back up plans

Online Set up

- **Linked:** With technology team ensuring Zoom linked with in-situ equipment as well as Qiqochat
- **Alignment:** Lead Technician, Lead & Deputy-Lead Facilitator & Producer to be in mutual eye-site
- **Testing** & Troubleshooting: Starting and testing QiqoChat and connectivity

The Event Flow

- **Team** – Facilitators, Producers, Recorders, Tech Support as required in place
- Onsite/InTime **Troubleshooting** – Last minute issues as required
- **Warm Welcome** – Ready to welcome people into event. Music, game or Taichi?
- **Internal messaging** – Emergency back-office communications system (e.g., WhatsApp) in place?

Post-Event

- **Debrief,** let off steam, celebrate, learn
- **Follow-up**: links to outputs as applicable (Book of Proceedings)
- **Evaluation** / feedback request, acknowledgement / thank you email
- **Next steps**: who when why what where how – Online Community space?

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