



D112 Guide to Holding Successful Hybrid Meetings

Toastmasters clubs that offer hybrid meetings—where some members meet in person while others take part online—provide a fantastic opportunity for members to develop their skills to present and communicate effectively in this medium. Since the 2020 global pandemic this option has become more popular and allows members and guests to take part from anywhere in the world, while still offering the benefits of having a physical meeting location.

Hybrid meetings allow Toastmasters to develop skills in presenting both to a roomful of people and to those online. Or, if you're connecting online, to master the skills of using an online platform to engage an audience even when you're not in the same room. These are highly valuable transferable skills which will set you up for success in many career and business settings.

Getting comfortable with Zoom technology

The majority of clubs have found that Zoom is the best online platform to use for online and hybrid club meetings. It's free for participants to use (although the host must have a paid zoom account to hold group meetings which are longer than 40 minutes in length).

If you are new to Zoom, check out these introductory videos:

- How to Install and Use Zoom Basic Features and Break Out Rooms (8 minutes)
- How to Join, Schedule or Start a Meeting (4 minutes)

You may also enjoy this one hour interactive masterclass specific to mastering zoom for your Toastmasters meetings. The masterclass includes everything from set up and etiquette, through to roles and best practises.

• <u>Sensational Online Meetings</u> (1 hour live tutorial)

While this video doesn't specifically discuss hybrid meetings, the majority of the recommendations are the same with a few modifications or additions as outlined below.

Technology Requirements

When holding a hybrid meeting—where some participants meet in person and others connect online via zoom—requires extra set up considerations, to ensure that everyone can fully participate in the meeting.

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To run a successful hybrid meeting you will need:

- A big screen TV or a projector and screen
- A laptop with webcam or laptop and separate webcam
- An HDMI cable to link the laptop to the TV screen or projector
- Internet connection (for example via free Wi-Fi, venue Wi-Fi or hotspot)
- Speakers for clear audio, if quality speakers are not included with the TV screen
- Optional wide angle lens webcam to be able to see a wider angle view of those in person.

Considerations

It's important in hybrid meetings that those that are present *in person* ensure that *online participants* are able to both:

- view the person who is speaking in person in the room (as part of the audience) and
- ideally to be able to view as many of the people in person in the room, as their audience, while speaking from online.

Role of 'online facilitator'

To achieve the two points above, it is vital that someone who is present in person needs to take the role of 'online facilitator.' This person needs to hold and angle the laptop, webcam or the phone mounted on a tripod (whatever is being used as the video to broadcast from the venue) to face the speaker or the audience at the appropriate times.

- If using a laptop, a longer HDMI cable is helpful to allow this to happen.
- If using a phone, consider mounting it on a tripod. It can be attached via a Joby mount to a standard tripod for greater mobility where it won't be susceptible to vibrations. Mounts are available from RubberMonkey; mount plus Gorilla tripod from stores such as Noel Leeming.
- This camera needs to have a clear view of the speaker but doesn't have to be in the front row; the experience can be much more authentic if the viewer feels part of the audience.
- You may wish to connect two devices to the online meeting one for viewing the audience and one for viewing the front of the room. The second device would remain muted but simply provide a second camera angle for the benefit of online participants.
- Ensure that devices are as static as possible (e.g. mounted on a tripod or placed on a flat surface) to avoid wobble.

When online participants are invited to speak—either to deliver a speech, a Table Topic, or any other meeting role—the meeting host should click the viewing mode to 'Speaker View' and move the webcam to face the audience (potentially by placing the laptop or webcam onto a pre-prepared chair/table at the front of the room.) The big screen will be at the front of the room facing the physically present audience so they can see online members throughout the meeting.

- Position this to be clearly visible to the audience but not to obstruct the stage area.
- Viewing mode should be on 'Gallery View' most of the time, and on 'Speaker View' when just one online participant is speaking.

By having an online facilitator, you can ensure that all online members are able to actively participate in the meeting and be included just as much as anyone in the room itself.

Alternative room setup: A boardroom style table with the big screen at one 'head' of the table and the other 'head' of the table kept clear as the speaking area. This way there is less need for the webcam/laptop to move and instead in person participants can simply swivel to face towards the big screen and laptop when online participants are speaking.

How to set up for a hybrid meeting

These practical set-up guidelines have been adapted from those developed by Palmerston North Advanced club to describe how to set up an online meeting.

The week before the meeting

Confirm Zoom meeting ID.

- Ideally this should be a recurring ID number and password which is created in the Zoom app by ticking 'Recurring Meeting.'
- You may wish to create a shortened link via an app such as <u>www.bit.ly</u> which is a free link shortened that allows you to take the long link and create a shorter one that is easier to remember and type in or share with others.
- Remote participants are best plugged into their internet via Ethernet cable, or close to the Wi-Fi router. If others in the household are using Netflix, YouTube or other such services it may affect the connection.

Send Zoom meeting ID to all members and guests.

 It is best to send the Meeting ID number and the password in case members or guests prefer to join by typing in the meeting ID and password rather than clicking a link.

This can be found by clicking 'Show Meeting Invitation,' then copying and pasting everything under the words 'Join Zoom Meeting' down the password (as per the example of the

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part highlighted in this screen capture.)

The information below this is not required as it relates only to the US.

• Email the agenda out so that online participants have it for reference, bring printed copies for those in person, or invite them to access the agenda via the easy-speak app on their smart phone.

Confirm who is bringing the laptop (with power cable) to the meeting.

• The laptop needs to have an HDMI port that fits the connector (as pictured), or an adaptor if required. A long HDMI cable is best. Check whether your venue supplies this or whether you need to bring one.



At least 30 minutes before the meeting

- Arrive at the venue. Turn on laptop and TV screen.
- Set up the room as desired. Check that there is a good position available for the webcam/laptop where it can face the audience to see the majority of people present.



Connect the laptop to the TV screen.

- Plug the HDMI cable (pictured above) into the HDMI port on the laptop.
- If using speakers connected to the TV screen at your venue, plug the sound cable (as pictured) into the headphone jack on the laptop.
- Select the appropriate Source/Input on the screen or projector.
- Check that the TV screen now shows the same image as the laptop screen. If not, choose the 'duplicate screens' option on your laptop press the Fn key plus one of the function keys (depending on laptop model), or right-click on the desktop, or go through the settings menu or control panel.
- Do a sound check prior to the meeting commencing to ensure you have adequate audio volume.
- Check that sound is coming through the TV screen (use TV remote to make sure sound is not muted) or check that the sound is coming out via plugged in speakers or via a speaker unit connected by Bluetooth.

Connect laptop to internet

- Link into the venue Wi-Fi, free local Wi-Fi or to a hotspot from someone's smart device by entering the relevant login and password.
- It is best to have a backup device in case you encounter any technical challenges when connecting.

Connect to Zoom meeting

- Go to zoom.us/join and enter the meeting ID or click the meeting link to launch zoom and go straight to the meeting room.
- Wait for the other attendees to join. Depending on the Zoom account settings, the account owner may need to join the meeting before others can join.

During the meeting

Optimising video:

- The online facilitator ensures that the laptop webcam faces the person speaking (if in the room), or captures as many audience members as possible when someone online is speaking.
- People in the room should look at the laptop camera and the rest of the audience when speaking, not at the TV screen. This will include online members in 'eye contact.'
- If an online attendee is speaking, the timing lights should be put near the laptop camera so as to be seen easily, but without blocking the speaker's view of the audience in the room.

Optimising sound:

- Unless you plug in a separate speaker, the microphone will be capturing sound via the laptop, so ensure that it is not too far away from the person speaking. Up to about 2 metres away is fine. Note that some laptops have very directional microphones, and give best results if the laptop directly faces the person speaking.
- Consider using signals (hand cupped to ear, thumbs up) for sound quality, and also having the online facilitator in the room monitoring speaker's position, ensuring they remain 'in shot.'
- All online participants should mute themselves when not speaking.

Changing the video layout:

- The default view in Zoom (Speaker View) maximises the video of the person who last made a sound.
- Click in the top right hand side of the Zoom window to tile every attendee in a smaller window instead (e.g. during discussions or when someone in person is speaking).

- If you wish to pin one speaker (e.g. to pin the timekeeper or to pin the speaker), hover over that person's video, click on the 3 dots, and click 'pin video'.
- These video layout settings are controlled individually by each attendee what one person does will not affect anyone else's view.

Handling visual aids:

- Visual aids used in person (pictures, diagrams, props, etc.) can be held up briefly to the laptop camera if appropriate. They will appear as a mirror image on the big screen, but will come through the right way around to people at the other end.
- Word of the day (or other notes) can also be typed into the Zoom Chat window.
- Visual aids on a computer (e.g. PowerPoint slides) can be shown by selecting the 'share screen' icon at the bottom of the Zoom window.
- The host needs to allow participants to share their screen. It is therefore important that participants planning to use slides make this known to the chair and the meeting host so that they can allow this permission.

Troubleshooting

If there is a problem with the laptop:

- Ideally a backup laptop or device should be brought to each meeting by another committee or club member.
- If laptops are unable to be used, the Zoom app can be downloaded onto a smart phone or tablet (it will most likely not be possible to connect to the TV screen, so will offer only limited size viewing).

If the laptop does not connect to the TV screen:

- Make sure the TV screen is turned on.
- Use the 'source' button to switch between HDMI1 and HDMI2 or various source channels.
- Check that the laptop is set to duplicate screens, as per instructions above.
- Check that the HDMI cable is plugged in properly at both ends.
- Try to connect using a VGA cable if available, and if the laptop has the required port, instead of the HDMI cable.
- It is also possible to run the meeting through the laptop only, without using the TV screen.

If one party cannot hear any sound:

- Make sure that person's speakers are turned on.
- Make sure attendees are not on mute in the Zoom window.
- Make sure the sound cable is plugged in properly at both ends, and the TV screen or speakers are not muted.

- Alternatively, unplug the sound cable and turn up the laptop speakers as loud as possible.
- Make sure people speak directly into their microphones. Laptop microphone users should directly face the laptop.
- Distorted sound can be caused by a bad internet connection at one end that person should reduce any other users on the same Wi-Fi or internet connection, try turning their video off or try leaving the Zoom meeting and then re-joining.

If the Zoom meeting suddenly stops:

- Try leaving the Zoom meeting and then re-joining.
- Check your internet connection is the Wi-Fi down or has the free data run out? If so:
 - Set up a Wi-Fi hotspot using a phone or tablet, and choose that as the laptop's internet connection instead of the original internet connection. Only do this if the phone/tablet owner is on a plan that allows ~1GB data use without incurring extra charges. Note that some plans do not allow hotspot use.
 - NOTE: A very unstable condition can cause Zoom to restart automatically

Recommendations for online participants

Ideal set up

For online meetings it is important to have a good set up in terms of space, positioning and lighting so you can be seen and communicate effectively.

Lighting

- Choose a spot where you don't have bright lights or windows behind you.
- Sit facing a window during the day and/or with lights in front of you casting light onto your face so you can be clearly seen. Ideally you want some sort of diffused light (like the light that comes through net curtains) rather than a bright harsh light.
- The easiest way to find the best position is by putting your smart phone on 'selfie mode' and moving around your home/office so you can quickly see where the lighting is best. You can start your own Zoom meeting and move around with your laptop to find the best setup.
- Overhead lights cast shadows, so sit back from them rather than straight underneath.

Positioning

- Set your laptop or webcam up so it's slightly higher than eye level. This may mean putting it onto of a box or some thick books for example.
- If you are using a phone or tablet, ensure that it is placed horizontally on a stable surface.
- Set yourself up far enough back and with the webcam angled slightly down so that you can see at least your head and shoulders, ideally your head, shoulders and upper arms.

Best Practise

- Practice gesturing so you get an idea of how much visible space you have.
- Practise looking at wherever your webcam is. This is important when you are speaking so that you give the appearance of making eye contact to connect with your audience. It is natural to want to look down at the screen, but when you do so you lose the feeling of 'eye contact.' This can feel uncomfortable at first and takes practice, but it makes a significant difference to the effectiveness of your online communication
- If you are using dual screens, always focus on the one with the webcam, rather than looking at the screen to the side.
- If you wear glasses, be aware of reflections and glare that may be distracting. You may be able to eliminate this by adjusting your seating position, the angle of the camera, the angle of your glasses or making the source or light more diffuse.

Backgrounds

- Aim for a fairly plain background if you can, as clutter can be distracting.
- You may be able to use virtual backgrounds, however this is only recommended if you have a plain background (or can create one with a sheet for example) so that you don't have arms/hands morphing in and out of screen when you gesture. Morphing often happens when virtual backgrounds are used without a plain background or sufficient lighting.
- To enable virtual backgrounds, click the small up arrow beside the 'Stop/Start Video' icon and click on choose a virtual background. Test this out in advance to ensure it's not a distraction during the meeting.

Zoom features

Zoom offers a range of functions that are important to understand for smooth flowing meetings. Join the meeting early so that you can make sure that your video and audio are working properly.

Mute/unmute

- At the bottom left of the screen you can click 'Stop/Start video' and 'Mute/Unmute.'
- You can also use Alt-A (for audio) to mute/unmute and Alt-V (for video) to stop/start video.

- The meeting host and co-hosts can also mute and unmute participants.
- You can also unmute briefly by holding down the space bar to say something, it will mute you again when you release the spacebar. Avoid leaning forward when you do this.

Viewing modes

- There are two viewing modes and it's important to be able to change between them. During speeches and perhaps the majority of the meeting you'll want to be on 'Speaker mode' which shows whoever is speaking full screen with a few participants as small thumbnails. 'Gallery mode' is where all participants (up to 25 people) are tied on the screen. If your meeting exceeds 25 there will be side arrows allowing you to flick between groups of 25 participants at a time. Tablets and phones have a smaller number of videos tiled on the screen.
- To switch between them, click 'Speaker mode'/'Gallery mode.' On smaller laptop screens or when the chat is open 'Gallery mode' will often appear as an icon with 9 small squares.
- On smart phones and smaller devices you usually need to swipe right and left to swap between 'Speaker view' and 'Gallery view.'
- 'Gallery mode' is best used for the business session, during breaks, and while Table Topics are being introduced – times when you may want to see everyone at once.
- To pin a particular video (for example the Timer) so that you can always see it even when 'Speaker mode' is on or when screen sharing is occurring, hover over that person's video image and click the three dots, then click pin video. You can unpin it at any point.
- To change your name as it appears, hover over your own video and click on the three dots and click 'Rename.'
- It is useful to include your role with your name, particularly for guests.

Chat

- In the bottom centre, click on the speech bubble to open the chat. You can then type in messages to 'Everyone' or privately to individuals by clicking the down arrow beside the word 'Everyone' to find the person's name.
- Note that once you've sent a private chat message, if you want to send a message to the group you, need to select 'Everyone' as the private chat option will come up by default.
- Private chat can be used if you want to ask a direct question for example, to confirm the timing/topic of a speech without disrupting the flow of the meeting. It can be distracting however, so use it only when required.

Reactions

• To show appreciation via the pair of hands clapping or the thumbs up icon, click the reactions button and choose the one you want to use. This will display on your video for a few seconds.

Advanced Features

There are some advanced features which you may or may not want to use during meetings.

Breakout Rooms

- You may wish to use breakout rooms for smaller discussion groups, for example when running 'Moments of Truth' or during a supper break. This allows more discussion between smaller groups of people when you have a lot of online participants. You may even want to invite guests into a 'Welcome' breakout room where a host greets them and gets to know them, so they can be properly introduced at the start of the meeting.
- Breakout rooms need to be enabled in your Zoom settings in advance of the meeting (and are only available on paid accounts). The meeting host needs to go to <u>www.zoom.us</u> and to login. Then on the left hand menu, click on 'Settings,' then scroll down to breakout groups and click 'Enable.'
- If there are for example 12 online participants, you can choose to make 2 groups (where it will randomly assign 6 people to each), or 3 groups (where it will assign 4 people to each and so on.) You can also manually assign people and move people around. Once you click 'Open breakout rooms,' participants will be invited to click to join their room.
- Once you click 'Close breakout rooms.' they will have 6 seconds before they return to the main room (with a countdown timer showing them this) or they can click to return to the main meeting at any point.
- You can also broadcast a message to let people know for example 'Please wrap up your conversations and re-join us in the main room.'

Side-by-side mode

- If someone is sharing their screen (e.g. a presentation), you can enable side-by-side view to allow you to view both the presentation and the speaker. To do this, choose 'Side-by-side mode' from the 'View options' menu.
- Once you are in side-by-side mode, you can use the vertical bar to the left or right in order to change the size of each section.

Polling

- Polls may be used if desired (for example to vote for best speaker, evaluator, Table Topic, or for club business)
- These need to be enabled through 'Settings' by clicking 'Enable polls.' Each poll and the response options need to be created in advance by the meeting host.
- The function is available to hosts or co-hosts. Hosts and co-hosts cannot vote through the poll, so the host may temporarily withdraw 'co-hosts' to enable them to vote.

The next sections explain considerations / points to note for each of the key meeting roles, particularly for those connecting online.

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Recommendations for Different Meeting Roles

Meeting Chair

Before the meeting

- Ensure that all meeting roles are filled and know who will plan to attend in person and online.
- Have a theme for the meeting and share this with everyone.
- Designate someone as the online facilitator to have control of the laptop and help people with any technical difficulties during the meeting. Ideally that person should have online members' contact details handy, in case they want to email, text or phone them to check attendance (if it's getting close to start time) – in case they might need help getting connected.

On arrival at the meeting

- Join the meeting early so that you can network with other club members and ensure that all meeting attendees are present.
- As each person joins the meeting online, check that their audio and video are working correctly.
- Copy the link to the easySpeak agenda and paste it into the meeting 'chat'. To do this, go to the easySpeak meeting screen, click the 'agenda' button in the top-right and then copy the web address/URL.
- Check if any speakers plan to share their screens/present. If so, check that they are familiar with how to do so and ensure you have given them access. The host can allow screen sharing by clicking 'participants' and hovering over that person's name and clicking 'more,' then either making them a co-host or allow screen sharing.

During the meeting

- At the start of the meeting, walk the attendees through the key Zoom features to be aware of:
 - How to mute/unmute
 - How to use the chat, (invite them to type something in to test it out)
 - How to switch between 'Gallery view' and 'Speaker view'
 - How to pin the timer
- Explain the etiquette for clapping for those online using sign language clapping by waving both hands beside your forehead, to show appreciation even while on mute.
- If any of the speakers will be using screen sharing, explain how this will be used. If desired, explain how to use 'split screen' mode (and check the Zoom host has allowed screen sharing ability).
- Introduce the person who is in the room as the meeting's 'online facilitator.'
- Ask the timer to explain how the timing lights/cards/backgrounds will work and to demonstrate these.
- Introduce guests and consider inviting online guests to share their email in the chat so you can send them details about future meetings.

- Be sure to 'lead the clapping' throughout the meeting by holding up and waving both hands.
- During the supper break, ensure that the online facilitator has muted the in person audio to allow those online to chat amongst themselves without loud background noise of others chatting. Accept that the meeting will effectively break in two at that point.

Speaker

Before the meeting

- For a prepared speech, make contact with your assigned evaluator to ensure that they understand your objectives and that they have a copy of the evaluation form. You can access all of the Pathways evaluation resources here: https://www.d25toastmasters.org/resources/pathways-resources/pathways-evaluation-forms/
- Let the chair know if you are planning to share your screen, for example to show a slide presentation

On arrival at the meeting

- Join the meeting early so that you can make sure that your video and audio are working properly. This also allows you to network with other club members and answer any last-minute questions from your evaluator.
- When your assigned evaluator joins the meeting, use the 'chat' feature of the meeting software to send them a private message with your email address. That will make it easier for them to send you their written evaluation after the meeting.

During the meeting

- Just before you speak, check that you have pinned the timer (especially if using slides or if there are more than 25 participants) and switch the 'Gallery view' so that you can see the audience.
- When it is your turn to speak, click 'unmute' so that people can hear you.
- Decide in advance if you are going to stand up to speak and ensure your laptop or webcam are at an appropriate height. If you are using a headset, check that it can reach a suitable distance, to allow you to stand.
- Be aware that large gestures may not fit on the screen, and that quick gestures may appear blurred to the audience, particularly if you are close to the camera. Practice using clearly defined yet natural movement.
- On camera, your face will be more visible than in a large room. Use this as an opportunity to use facial expressions to convey meaning, ideas and emotions.
- If seated on a swivel chair, avoid swivelling.

After the meeting

- Make contact with your Evaluator to thank them for their feedback and ensure that they are able to return their written evaluation to you.
- If you have completed a Pathways level or have qualified for an award under the traditional education programme, contact the club's VP Education for more information.

Evaluator

Before the meeting

 Make contact with your assigned speaker to ensure that you understand their speech project and objectives. Check that you have a copy of the evaluation form. You can access all of the Pathways evaluation resources here: <u>https://www.d25toastmasters.org/resources/pathways-resources/pathways-ev</u> <u>aluation-forms/</u>

On arrival at the meeting

- Join the meeting early so that you can network with other club members and greet your assigned speaker.
- When your assigned speaker joins the meeting, use the 'chat' feature of the meeting software to send them a private message with your email address. That will make it easier for you both to follow-up after the meeting.

During the meeting

- For speech evaluations, make notes using the evaluation form as the speech progresses.
- For Table Topics evaluation, make notes so that you can provide feedback to each speaker.
- Use the 'Gallery view' at times to see the reaction of the audience.
- When giving your verbal evaluation, remember to include feedback on the effectiveness of the speech in the context of a hybrid meeting.

After the meeting

- Type up your notes as soon as possible using the evaluation form and send them to the speaker.
- Reflect on how your observations of the speech and the meeting as a whole can help you next time when you are a speaker.

Timer

Before the meeting

• Familiarise yourself with the agenda so that you know the timings for each speech and agenda item.

- For online timers find large coloured cards or brightly coloured items that you can hold up to the camera to indicate the timings. Remember that it can be difficult for speakers to see the timer, so there's no need to be subtle.
- You may alternatively like to use the virtual coloured backgrounds provided on the Toastmasters International website at this link: https://www.toastmasters.org/resources/resource-library?t=backgrounds
- These can be uploaded by clicking the up arrow beside the 'Stop/Start video' icon, selecting 'Choose a virtual background,' then clicking the small + symbol under the right side of your image to choose the files to upload.
- Once the timing background images are uploaded you can click each one to flick between them. If you cover your webcam just prior to clicking the background it will fill your entire video.

On arrival at the meeting

- Join the meeting early so that you can network with other club members and test out your timing props
- Practice using the meeting software by sending a private chat message to the meeting chair. They may use this function if they wish for you to shorten or change any timing aspect of the meeting.

During the meeting

- Use a stopwatch, smartphone or other timing device to keep track of the times.
- At the appropriate times, display the timer virtual background or hold up your timing prop, so that it is clearly visible to the camera.

Table Topics Master

Before the meeting

- Plan Topics that are fun and engaging, and will work well in the context of a hybrid meeting.
- Tie your Table Topics into the meeting's theme.
- Identify the participants in Table Topics: Try to pick people that do not have significant speaking roles in the meeting. Invite guests to participate once members have given an example.

During the meeting

- Remind online speakers to pin the timer.
- Present your theme and invite the participants to respond to your Topics.

Grammarian

Before the meeting

• Review the meeting agenda so that you are familiar with the planned meeting agenda and roles.

• As grammarian, prepare the 'Word of the Day' and either print it or write it in large letters. If you are online you can type it in the chat. You may also want to ask the chair or someone who will be present in person to print it out or write it on a whiteboard.

During the meeting

- As an online grammarian, present your 'Word of the Day' by holding up your sign to the camera and by typing it into the online 'chat.'
- You can encourage online members to acknowledge whenever the Word of the Day is used by clicking the thumbs up reaction button.
- Make notes on each participant's use of grammar and fluency of speech, and deliver your evaluation when called upon to do so.

General Evaluator

Before the meeting

- Review the meeting agenda so that you are familiar with the planned meeting agenda and roles.
- Familiarise yourself with these tips and other materials on how to participate effectively in virtual meetings.

During the meeting

- Make notes on the effectiveness of the meeting and each participant's preparation, delivery and performance of duties and whether the meeting fully included all in person and online participants.
- Deliver your evaluation at the end of the meeting, including tips on how future meetings could be improved.
- Ensure that meeting guests and first timers have had an opportunity to introduce themselves and provide feedback.