



ORGANIZING A HYBRID EVENT

A Checklist

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Hybrid events – i.e. meetings, workshops, conferences, or other kinds of events that combine in-person/on-site with online participants – are becoming increasingly frequent. They have many advantages, for example, they are more inclusive – people who cannot participate in-person can participate online; they lower the carbon footprint by reducing the need for travel, and especially air travel. However, hybrid events require considerable human and technical resources, as well as careful planning.

The checklist aims to support event organizers to plan and deliver a successful hybrid event. The idea for the checklist originated during discussion at EIFL's online meet-ups for open science trainers, and meet-up participants also helped to shape its content.

The checklist can be adapted to suit the needs of different kinds of events, for example, national training workshops, or for an event that is organized for one faculty, but is then made open to the whole university, or for an international conference.

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Is 'hybrid' the best format for your event?

Before you start planning, make sure that the hybrid format is the best option for your event and that it was chosen after a careful analysis of the event's purpose, target audience and the advantages of the hybrid format over fully in-person or fully online events.

Hybrid events are typically used in situations where participants are geographically dispersed or when not everyone is able to travel due to time, budget, or other constraints. They are also a good option when organizers want to increase the visibility and reach of an event, or when inclusivity and accessibility are priorities. A hybrid format can also accommodate more people, and this is especially useful when the venue has limited capacity and interest in the event is high.

Organizing a hybrid event is more complex than it might seem – it is like planning two events at once, one on-site and one online, and then making sure they function as a coherent experience. Promotional materials should clearly state that the event is hybrid and explain what that means in practice, so participants know what to expect and how they can engage. Without careful planning, it is easy to end up in situations where online participants cannot hear or see what is happening in the room, or where they feel ignored because moderators are focused only on the on-site audience. Making the two audiences work well together requires special attention, technical means, coordination, and often more resources. However, when done right, it can make the event much more inclusive and engaging.

Timing and session design are particularly important in a hybrid setting, as session lengths and formats have to work well for both on-site and online audiences: shorter talks instead of long lectures, more interactive elements like panels or workshops, and regular breaks to avoid online fatigue.



Planning

- Start planning early, e.g. about two months in advance for smaller events, and 6-12 months for larger or more complex ones.
- Develop a budget and identify the required human, technical, and organizational resources.
- Identify speakers, trainers and facilitators and establish their expectations and needs, and make sure their needs are met when you design the event.
- Identify the target audiences (on-site and online).
- Identify and address the technical, accessibility, comfort, communication, and participation needs of both on-site and online participants.
- Select a date and time that is likely to suit your target participants / audience.
- Take into account costs for participants (e.g. travel, accommodation), location, and other issues that might prevent people from taking part when planning the event.
- Draft the event scenario and identify potentially critical issues (e.g. budget target not met, online platform and equipment failure, electricity cuts, internet issues, delays, cancellations, unexpected costs, overspending etc.) and how to deal with them.



If you're charging an event fee, consider offering a discounted rate for online participants. This can make the event more accessible and attract a larger audience.

- Select the venue based on all relevant requirements and book it well in advance.

Roles and responsibilities

- Establish the organizing team.
- Appoint staff for:
 - On-site event coordination (a registration desk managing on-site and online registrations and monitoring email correspondence, logistics support, team members assisting with slide playback, time management, etc.)
 - Online platform management (e.g. hosts, co-hosts, live streaming manager, etc.)
 - Technical support for on-site equipment (sound and video technicians, computer operators, network technicians, microphone runners, etc.)
 - Facilitation and moderation on-site and online (on-site moderators, online Q&A platform and chat moderators, facilitators managing interaction applications, etc.).

Technology selection and testing

- Explore in detail available platforms for managing online events (esp. functionalities and pricing).
- The chosen platform(s) should enable:
 - Live streaming (if needed)
 - Interaction (chat, Q&A, and polling)
 - Recording
 - Archiving of the recordings, presentations and other materials



If possible, prioritize an event management platform you are familiar with. If you have to use a platform you are not familiar with, make sure to have enough time for testing the platform and training your staff to use it well.

- Test all equipment and the chosen platform(s) before the event in the same settings (online and on-site) in which your event will take place.
- Ensure that several cameras are available to show and record the event from different angles; if this is not possible, a laptop webcam can provide an additional view of the audience for online participants.
- Plan to offer good quality Wi-Fi connection for the participants, space for charging devices or enough extension cords to sockets.
- Test the range of the microphone(s) before the event.

- Ensure that additional devices (e.g. laptops, cameras, microphones, etc.), alternative connections, and additional staff are available in case something happens with the main devices and staff.
- Ensure that there are no additional fees for either on-site or online participants (e.g. for using interaction tools).



Test that platforms and tools work on mobile devices and different browsers (e.g. using a whiteboard application can be difficult for participants on mobile phones).

Avoid platforms that require complicated logins or downloads and make sure all participants can access and use the event management platform free of charge.

Choose tools that work well for all participants, including those using free versions, since paid features available to organizers may not be accessible to others and can negatively affect their user experience.

Use fewer tools that have multiple functions to avoid confusion and technical issues.

Accessibility

- Provide clear information on available accessibility features (e.g. wheelchair access, sign language interpretation, live captions, accessible seating, assistive listening systems, etc.) on the event website, so that participants, when they register, would know their participation options.
- During event registration, consider asking participants about their special needs.
- Provide registered participants – especially those who have indicated specific accessibility needs – with clear, detailed information in advance about all available accessibility features for both on-site and online participation (e.g. accessible entrances, physical access routes, restrooms, lifts, seating arrangements, assistive services, closed captions, screen reader compatibility, etc.).
- If possible, ensure that the in-person venue allows people with disabilities to easily enter, move around, and access all areas and facilities.
- Consider choosing online event management platforms that are compatible with assistive technologies.
- Enable live captioning and/or transcripts that can be accessed by on-site and online users.

- Enable multiple modes of participation (voice, chat, anonymous questions) so that everyone has a fair chance to speak and that all participants can ask questions and be heard.



Session design

- Prepare two versions of the programme: a public version for both virtual and in-person participants and an internal version for the event management and implementation team that includes more granular timings and responsibilities of different event team members (a run sheet of the event).
- Adjust session duration and formats for hybrid delivery (e.g. there are no long talks that are hard to focus on online, panels and workshops will work for both online and on-site participants, etc.)



If there is a poster session, include all information about posters in one place and ensure that all posters are designed in a way that works well both physically (in-person) and digitally (for virtual platforms).

Encourage authors to include a QR code on each physical poster that links to a digital version of the poster, as well as to additional resources such as videos, blog posts, or supplementary materials. Additionally, advise authors to enhance the digital versions of their posters with interactive elements like clickable links, embedded videos, and animations, providing a more engaging and dynamic experience for online participants.

- Take measures to ensure online participants can actively participate, not just observe.



Collect and make available all links, documents, and instructions on the event page/repository and update in real time.

Use an interactive tool (e.g. a Q&A or polling platform such as [Particify](#)) that allows both on-site and online participants to submit questions and comments.

Use the chat function to provide links, documents, or instructions so that online participants can easily access materials.

Display QR codes or shortened URLs on slides and printed materials linking to relevant resources, documents, or instructions to make it easy for on-site participants to access materials on their devices.

Actively integrate questions and contributions from online participants into the on-site discussion.

Provide online participants with opportunities to speak during Q&A or discussion segments.

Design breakout sessions that enable online participants to collaborate in parallel with on-site groups and report back.

If hybrid breakout rooms are organized, use multiple cameras so that online participants can clearly see what's happening in their room.

If the event includes poster contributions from both on-site and online participants, hosting a virtual-only poster session before or after the event is more inclusive and less technically demanding than organizing a hybrid session.

If live streaming is enabled, keep the delay as short as possible. If there is a longer delay, moderators should keep inviting questions to avoid silence after the presentation.

Address online participants directly so they feel included.

- Plan regular breaks (e.g. every two hours) that would work for both audiences.



To facilitate information networking and conversations among online participants, offer optional breakout rooms during event breaks.

Turn off the main microphone during breaks so online participants don't hear background noise.

- If your target audience comes from different time zones, schedule sessions to allow the widest possible participation.

- ❑ Offer remote speakers from different time zones or those with technical issues the option to pre-record their presentations.
- ❑ Provide clear guidance on participation norms (code of conduct), timing, interaction, tools and technical setup.
- ❑ Assign a dedicated moderator for online questions and discussion.
- ❑ Provide clear guidelines to moderators on how to actively engage with and integrate online participants into the on-site discussion.
- ❑ Provide clear guidelines to speakers on hybrid-specific delivery, including camera use and how to address both on-site and online audiences.
- ❑ Ensure that speakers are aware of the limits of the camera's range and are instructed how to stay visible and do not wander off camera.
- ❑ Ask speakers to share their presentations in advance and upload them on devices that will be used to run the event.



Encourage presenters to make their presentations available in advance, e.g. via a repository, and include a QR code on their slides (e.g. at the beginning and end) linking to a digital version of the presentation. Presenters should also use clickable links within slides to make it easier for the audience to explore the content after the sessions.

- ❑ Assign a team member to provide a microphone to on-site audience members wishing to ask questions or contribute comments.



If this is not possible, make sure that the question or comment is repeated by someone with a microphone before speakers respond to them.

- ❑ Set up a feedback form to collect feedback during and after the event from on-site and online participants.



Implementation

Registration

- Require participants to indicate their mode of participation (in-person or online) in the registration form.
- Collect accessibility requirements and other specific needs (e.g. dietary restrictions, language support, technical assistance) in the registration process to enable appropriate arrangements – e.g. to plan for including sign language interpretation for deaf and hard-of-hearing participants.
- Provide clear information at registration about what in-person and online participation involve, including interaction, technical set-up, and venue details.
- Send out the registration form early on.
- Set a clear registration deadline to allow sufficient time to organize the event and support participant needs.
- Obtain consent for recording and live streaming during the event and data use for both participation modes.
- Process registration data in advance to anticipate capacity, support the needs expressed, and plan on-site and online engagement.

Delivery and management

- Run a final technical rehearsal, involving all members of the technical support team.
- Preload all presentations and test them on a dedicated computer. Define a clear procedure for online speakers, speakers who submit a presentation late to test the file and transfer it to the dedicated computer prior to their session.
- Provide clear guidelines for participating in both on-site and online sessions (in multiple languages, if needed).

- ❑ Post signs in the room indicating that recording is in progress, for participants who arrive late and may have missed the announcement at the start.
- ❑ Ensure that technical support staff continuously monitor audio, video, and connectivity quality.
- ❑ Set up a workflow to respond promptly to technical or access problems.
- ❑ Establish an internal communication channel for the event organizers to flag and resolve issues in real time.
- ❑ Assign multiple co-hosts for the online channel to ensure quick access, monitor the online experience and facilitate engagement.
- ❑ Ensure that session chairs have a backup plan in case a scheduled speaker is unable to attend or present.
- ❑ Appoint back-up chairs and facilitators to step in if needed.
- ❑ A dedicated staff member monitors correspondence via a contact email for the event during the event.
- ❑ A moderator should inform participants how they could provide their feedback during the event (e.g. by using reactions and writing in the chat if participating online and using a QR code to access the feedback form for on-site participants).



Post-event activities

- ❑ Collect feedback after the event to assess the relevance of the content, engagement opportunities and technical performance for future improvement.
- ❑ Make recordings and materials available and communicate this to participants (e.g. via a follow up email).
- ❑ Document lessons learned for future hybrid events.

Resources

In preparing this checklist, we reviewed resources covering events of varying sizes and scope.

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