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HYBRID MEETINGS PLAYBOOK

A practitioner's playbook for running a hybrid meeting that serves the remote audience as well as the room.

Graham Tolliver-Reyes

EVENTS AND MEETINGS

ABOUT THIS GUIDE

This playbook shows you how to run a hybrid meeting that serves the people on the screen as well as the people in the room. It is written for chapter leaders, committee chairs and association meetings staff who have a conference room, a modest budget and a session to run. Everything in it comes from sessions I have run, or watched fail, at the Institute of Coastal Resilience Planners, and from the chapters and member associations that have asked me for help.

HOW TO USE THIS GUIDE

Read sections 1 to 4 before you plan your first hybrid session, because they explain the failure you are trying to prevent and the one staffing decision that prevents it. Section 5 gives the Q&A structure to rehearse with your moderators, and section 6 is for the moment something breaks. Section 7 sizes the budget to the session, and section 8 covers what happens after the room empties. Section 9 is a checklist you can print, section 10 points to NANA programs where you can practice, and the appendix is a run-of-show you can copy into your own agenda.

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1

DECIDE WHICH KIND OF HYBRID YOU ARE RUNNING

The first job is to name which kind of hybrid your session will be, and the playbook starts there because I learned it from audiences split between a room and a screen. I direct meetings for the Institute of Coastal Resilience Planners, a 2,400-member association of coastal planners and floodplain managers spread across every state with a meaningful coastline. A large share of that membership can't travel to every session the institute runs. I have run hybrid sessions for years out of necessity rather than as a pandemic-era addition to an otherwise in-person meeting calendar.

Most hybrid guidance I have read assumes the remote audience is a smaller, secondary group tolerating a broadcast of the real meeting. For us, the remote audience is often the majority of the people attending, and the session has to be built for both from the start, not patched afterward with a camera in the corner. In a typical institute workshop, 60 to 70 percent of registrants join remotely. A floodplain manager in Oregon pays the same registration fee as one who drives to Miami, and she expects to be heard on the same terms.

That expectation is the test I apply to every format. The word "hybrid" gets attached to three quite different kinds of meeting, and only one of them gives the remote attendee a real seat. The table below separates them so you can name which one you are about to run.

FORMAT	WHAT THE REMOTE ATTENDEE CAN DO	WHEN IT IS THE RIGHT CHOICE
Streamed	Watch and listen. No way to ask a question or be heard.	A keynote or plenary where the audience is large and the content is a prepared talk.
Mirrored	Ask questions through chat, which the room may or may not see.	A webinar with a small in-person studio audience, where the host is on the screen.
Shared	Speak, be seen, be answered and vote, on the same terms as the room.	A committee call, a board meeting, a workshop or any session built on discussion.

Table 1. Three kinds of meeting that get called hybrid, and what the remote attendee can do in each.

Most of this playbook is about the third format, because it is the hardest and the one members complain about. A streamed keynote needs good audio and a steady camera, and it will not disappoint anyone who knows

what they signed up for. A shared session needs a plan for attention, and attention is what the room loses first.

When a chapter chair tells me she wants to "add a video option" to a roundtable, I ask which of the three she means. Nine times in ten she means the third, and she has budgeted for the first. The rest of this guide closes that gap without asking her to buy broadcast equipment.

2

THE ROOM-VERSUS-REMOTE EQUITY CHECKLIST

Test the agenda before you build it, so the remote audience has a planned place in every part of the session. Hybrid sessions fail the remote audience in a specific, repeatable way: the in-person room, energized by physical presence and side conversation, gradually stops addressing the camera at all. I call it the room forgetting the camera. A remote attendee experiences it as watching a conversation happen at them rather than with them.

The drift follows a pattern I have now seen in more than a hundred sessions. In the first ten minutes the room is careful, because the moderator has just introduced the people online. By minute 40 the panelists are turning toward each other and answering in half-sentences that depend on a nod or a glance. By minute 70 the remote attendees have stopped typing questions, because none of the earlier ones were answered.

You can interrupt that pattern with agenda design alone, before any equipment arrives. Run these four checks against your draft agenda.

Before building the agenda, check:

- [ ] Does every agenda item have a planned moment for remote-audience input, not just an open "any questions from online?" at the end?
- [ ] Is at least one presenter or panelist joining remotely, so the room practices treating a remote voice as a full participant rather than an afterthought?
- [ ] Does the session length account for the extra time a genuinely two-way Q&A takes, rather than assuming remote Q&A can be compressed into whatever time is left?
- [ ] Is there a specific person responsible for representing the remote audience's presence to the room, distinct from the session's main moderator?

A session that answers "no" to more than one of these questions is likely to fail the remote audience regardless of how good the underlying video and audio equipment is. I score every draft agenda this way before I book a room. The table shows what a yes looks like in practice, and what I do when the answer is no.

CHECK	WHAT A YES LOOKS LIKE	REPAIR WHEN THE ANSWER IS NO
Planned remote input	A named 5-minute window after each 20-minute segment, printed on the agenda	Split the closing Q&A into three shorter windows and move one before the midpoint
A remote voice on the program	One panelist or speaker on a screen, with a tested connection	Invite a member who cannot travel, and rehearse the connection the week before
Time for two-way Q&A	Q&A block sized at 140 percent of an in-room-only plan	Cut one prepared item rather than shorten the questions
A person for the remote audience	A named remote moderator, introduced to the room at the start	Borrow a committee member who is not presenting, and brief them for 15 minutes

Table 2. The four equity checks, what a yes looks like and the usual repair.

The third check is the one that surprises people. A question from the floor takes about a minute and a half from asking to answer. A question that comes through chat has to be spotted, read aloud, repeated for the room and answered toward a camera, which takes closer to two and a half minutes. If half your questions arrive by chat, the average rises to two minutes, a third more, and the pauses for audio delay bring the total to about 40 percent. A room-only plan that gives the Q&A 18 minutes therefore gets 25 in my hybrid version.

Time zones belong in this checklist too, because a start time that works in Miami can lock out half the remote audience. My institute's members run from Eastern time to Alaska and Hawaii, and I choose start times by working backward from the westernmost registrants. The table below is the one I tape to my monitor.

ZONE	LOCAL TIME IF THE SESSION STARTS AT 1:00 P.M. EASTERN	VERDICT
Eastern	1:00 p.m.	Fine
Central	12:00 p.m.	Fine, and it avoids most lunch hours
Mountain	11:00 a.m.	Fine
Pacific	10:00 a.m.	Fine
Alaska	9:00 a.m.	Early, but workable
Hawaii	7:00 a.m.	Too early for most; offer the recording or move the start

Table 3. One start time across six zones, using daylight time.

An 11:00 a.m. Eastern start would have put Pacific attendees at 8:00 a.m., Alaska at 7:00 a.m. and Hawaii at 5:00 a.m., and I have watched registration fall off at exactly that threshold. When a session must run at an awkward hour, I tell the remote audience so in the registration email and record the whole thing.

Set expectations in the registration email as well, because a remote attendee who knows what the format offers is easier to serve. Say in two sentences how questions will be taken, when the input windows fall and when the recording will be posted. State plainly that the session is shared, so that people join to take part and not only to watch.

Ask registrants at the same time whether they need an accommodation, and give a date for the request that leaves time to book captioning or an interpreter. In my experience about 4 percent of registrants for a public workshop ask for something, and the requests that arrive late are the ones I cannot meet.

Thorvaldsen's rule costs nothing and needs no equipment. I now suggest it to every committee chair who writes to me, and I write it into the agenda as a line item so that nobody has to remember it.

> “
> On our hybrid board calls, whoever is remote speaks first when a vote opens. The room can always interrupt later, and the screen can't.
>
> SIGNE THORVALDSEN, EXECUTIVE DIRECTOR, CASCADIA FOREST PRODUCTS COUNCIL

3

CAMERA AND AUDIO SETUP FOR A MID-SIZE CONFERENCE ROOM

A room of 20 to 60 people can host a remote audience without a production crew, once you know what to buy, what to borrow and how to test it. I tell every chapter and committee that asks me for hybrid setup advice the same thing. The equipment matters less than most first-time hybrid organizers assume, and moderation matters more. A mid-size conference room, the kind most NANA chapters and committees actually have access to, can run an effective hybrid session without broadcast-studio equipment.

Minimum viable setup:

- [ ] One camera with a wide enough field of view to capture the full panel or presenter area, positioned at roughly eye height for a seated audience
- [ ] A dedicated room microphone system, not the laptop's built-in microphone, with at least one handheld or lavalier mic for audience questions from the floor
- [ ] A dedicated remote-audience microphone feed the moderator can hear clearly, separate from the room's own sound system
- [ ] A second monitor or screen visible to in-person presenters, showing the remote audience or chat, so presenters can see who's asking a question without turning away from the room

I put audio first in every purchase decision. A remote attendee will forgive a soft picture, a slightly cropped panel or a flat camera angle for a full hour. The same attendee will leave within five minutes of a room that echoes, clips or drops the speaker's last word.

The prices below are what I have paid or been quoted in the last two years. They are ranges, not recommendations of a brand, and they assume a room that seats up to 60.

ITEM	TYPICAL COST	WHAT IT REPLACES OR PREVENTS
Wide-angle conferencing camera, USB	$450 to $1,800	A laptop webcam that sees three people and the ceiling
Tabletop microphone array or ceiling mic	$400 to $900	The laptop microphone that picks up the air handler
Two wireless handheld microphones	$350 to $700	A floor question the remote audience cannot hear
Small audio mixer, four channels	$200 to $350	Feedback when remote audio plays in the room
Confidence monitor, 27-inch	$200 to $300	Presenters turning their backs on the room to read chat
Dedicated laptop for the remote feed	$0 to $900	A presenter's laptop doing three jobs at once
Tripod, cables and stands	$150 to $300	A camera on a stack of binders

Table 4. Equipment for a room of up to 60 people, with typical cost and what it replaces.

A full set at the middle of each range comes to roughly $3,500. A room that already owns a decent conferencing camera and a mixer can reach a working setup for under $1,500.

Two problems account for most of the audio failures I have been called to fix. The first is echo: when the remote attendee's voice plays through the room speakers and the room microphone picks it up again, the remote attendee hears themselves a moment after they speak. The fix is a mixer that sends the remote voice to the room speakers but removes it from the signal sent back out, which engineers call a mix-minus. If that term is unfamiliar to your technician, hire a different technician.

The second problem is the network. A hybrid session sends video and audio out of the building and brings the remote participants' audio back in, so upload speed matters more than download speed. I ask the venue for a wired connection, not wifi, and for 10 megabits per second of upload capacity set aside for the session. I have lost a session to a hotel network shared with a wedding downstairs, and I will not repeat that.

Cobbleridge Broadcast, the livestream and hybrid-session production sponsor at several NANA meetings, recommends testing the full audio chain, room mic to remote feed and back, at least thirty minutes before a session starts, since audio problems are far more disruptive to a hybrid session than video problems of similar severity. I follow the same rule and add one step to it. During the test, I put a person at home or in a parked car on the remote side and ask them to read a paragraph while I walk the room

with the handheld. If that person cannot follow me from the far corner, the session is not ready.

Placement matters as much as purchase. Seat panelists in a shallow arc, no deeper than a slight V, so that every face turns toward the camera when its owner turns toward the others. Hang no window behind the panel, because a backlit panel becomes a row of silhouettes on the remote side. Put the confidence monitor beneath or beside the camera, so that when a presenter reads a remote question, their eyes land near the lens.

Slides need their own rule, because a camera pointed at a projector screen produces an unreadable rectangle of glare. Share every deck through the conferencing platform from a single laptop, and have the presenter advance the slides from that machine. Keep the font at 24 points or larger, since a remote attendee may be reading on a phone, and email the deck to registrants an hour before the start so nobody depends on the stream to read a table.

Decide where the chat window lives before the doors open. I keep it on the confidence monitor, beside the remote moderator's face, and never on the main screen the room is watching. A chat scrolling behind a speaker pulls the whole room's eyes away from the person talking, and it exposes half-formed remarks to people who were not meant to see them.

Captions deserve a decision at this stage, not at the last minute. Live captioning can be added to most conferencing platforms for a modest fee, and it changes who can attend.

I have taken that advice to heart and now book captions for every public session. The recording then carries a ready transcript, which matters again in section 8.

> “
> Captions are not a favor to the three people who asked for them. In a room with a weak speaker system, half the remote audience reads along, and the transcript is what they search the next day.
>
> ESPERANZA VILLALOBOS-NYE, ACCESSIBILITY PROGRAM LEAD, SOCIETY OF ACCESSIBLE DESIGN PROFESSIONALS

4
THE TWO-MODERATOR MODEL

Staff a hybrid session so the remote audience always has someone speaking for it. The change I recommend most often to chapters and committees new to hybrid sessions is a dedicated remote-audience moderator, distinct from the person moderating the in-person session. The remote moderator's sole job is watching the chat or remote Q&A queue and actively working questions into the session, rather than waiting for the in-person moderator to remember to check.

This single addition, more than any equipment upgrade, is what keeps the room from drifting away from the screen. An in-person moderator managing a live room has genuinely limited attention to also track a remote channel, and asking one person to do both jobs well is asking more than most sessions can reasonably deliver. I have seen strong moderators try. They manage the room well for 20 minutes and then glance at the chat window and find 14 unanswered questions.

The two roles divide cleanly once you write them down. The table below is the version I hand to volunteers.

RESPONSIBILITY	SESSION MODERATOR (IN THE ROOM)	REMOTE MODERATOR (ON THE SCREEN)
Time and agenda	Owns the clock and the order of speakers	Flags when a remote input window is due
Questions	Takes hands and floor microphones	Collects, sorts and queues chat and Q&A entries
Reading questions aloud	Reads remote questions to the room, in the asker's words	Marks which question is next, with the asker's name
Technical trouble	Keeps talking, and calls a short pause if needed	Reports lost audio or video the moment it happens
Private channel	Reads one-line messages from the remote moderator	Sends one-line messages: "Audio is breaking up" or "Three people asked about dues"

Table 5. What each moderator owns, and what they hand to the other.

The private channel is the part people skip, and it is what makes the pair work. The two moderators keep a separate chat window, visible only to them, where the remote moderator can send a single line without interrupting the room. The session moderator glances at it between

speakers and acts on it. Without that line, the remote moderator's only tool is to unmute and interrupt, and good remote moderators will not do that.

Brief the pair together, in person or on a call, for fifteen minutes the day before. Agree on three signals: a request to pause, a request to take a remote question next, and a warning that the remote feed has failed. Then introduce the remote moderator to the room by name at the start of the session, and ask the room to wave at the camera. The wave is a small thing, and it sets the habit that the screen holds people.

I give the session moderator a script for the first ninety seconds, because the opening is where the room's habit forms. It runs close to this.

"Welcome to everyone here in Miami and to everyone joining us online. [Name] is our remote moderator, and will bring your questions into the room as they arrive. If you are online, please write your question in a full sentence with your name and organization, and we will read it aloud and answer it toward the camera."

The script names the remote moderator, states the rule for questions and tells the remote audience they will be answered in order.

Rotate the remote moderator's seat across a committee's members over a season. The job teaches a person, in one session, how the meeting feels from the other side, and a chair who has spent an hour as the remote moderator runs the next in-person meeting differently.

That ten-minute window is why I put the introduction of the remote moderator in the opening script and not at the first Q&A.

> “A remote attendee decides in the first ten minutes whether anyone in the room knows they are there. After that, the only thing left to decide is whether to leave.
>
> ROSALIND KETTERING, DIRECTOR OF MEETINGS AND EVENTS, NANA

A WORKED EXAMPLE: THE ROCKY MOUNTAIN CHAPTER'S QUARTERLY BOARD CALL

In 2025 the Rocky Mountain chapter ran its quarterly board call with roughly half its directors in a Denver conference room and the rest remote across three states. In the October 2024 and January 2025 calls, before the chapter adopted the checklist in section 2, remote directors regularly reported missing side conversations that shaped a vote before it was formally called. Assigning a remote moderator whose only job is relaying those asides into the shared chat, and pausing for a remote-specific comment window before every vote, closed the gap within two meetings, according to the chapter's own board minutes.

The minutes show how the gap closed. After those two calls, three motions were reopened at the next meeting because a remote director said he had not understood what had been decided. After the change, made for the

April 2025 call, no motion was reopened in April or July. The chair, Tobias Kren, had set the comment window at three minutes before every vote, and the remote moderator used it to read out any aside that had happened in the room.

The same change cost the chapter nothing in equipment. It reassigned one director from voting duty on procedural items to the moderator seat, a rotation that now turns over each quarter so that nobody carries the job for long.

> “With a quarterly board, a vote one director did not understand is not settled, it is postponed by three months. I would rather spend three minutes before every motion than a whole meeting undoing it.
>
> TOBIAS KREN, PRESIDENT, MOUNTAIN STATES SKI AREA OPERATORS COUNCIL

A WORKED EXAMPLE: A COASTAL PERMITTING WORKSHOP AT THE INSTITUTE, 2025

In March 2025 the institute ran a one-day workshop on coastal permitting in Miami with 64 people in the room and 118 online, 182 in all. The previous year's edition had used a single moderator. In that session, remote attendees submitted 19 questions and the panel answered 7, a rate of 37 percent, and the remote feedback score averaged 3.6 out of 5.

For the 2025 edition I assigned a remote moderator, a member of my own team, and added a five-minute remote input window after each of the four segments. Remote attendees submitted 34 questions, and the panel answered 31, a rate of 91 percent. The remote feedback score rose to 4.5 out of 5, and the camera, the microphones and the room were the same as the year before.

The lesson I took from the two years side by side is plain. The production did not change, the moderation did, and the remote audience noticed the moderation.

5
RUNNING A HYBRID Q&A

A hybrid Q&A needs a structure that survives audio delay and a room that wants to talk to itself. Audio delay between the room and remote feeds, even a delay as short as half a second, is enough to break the natural back-and-forth rhythm of a live Q&A. The result is the awkward interruptions and talked-over responses common to poorly run hybrid sessions. Video delay of a similar length rarely causes the same problem, since viewers tolerate a half-second of lip-sync mismatch far better than a broken conversational rhythm.

The reason is simple enough to explain to a panel in one sentence. In ordinary conversation, people start speaking about 200 milliseconds after the other person stops, so a delay of 500 milliseconds guarantees that both people begin at once. The structure below gives up on live back-and-forth and replaces it with a clean handoff.

Structure that works:

1. The remote moderator queues questions in the order received, alternating with in-person questions from the floor rather than batching all remote questions to the end.
2. The session moderator reads each remote question aloud to the room before the panel responds, so in-person attendees hear it the same way they'd hear a question from the floor.
3. The panel addresses the camera directly when answering a remote question, not just the room, even though this can feel unnatural to a presenter unused to hybrid formats.
4. If a technical delay makes real-time back-and-forth impractical, the remote moderator says so explicitly rather than attempting a broken exchange: "we're seeing a short delay, so I'll read the full question and we'll take the answer as a statement rather than a live back-and-forth."

Each step solves a specific problem. Alternating keeps the remote audience from waiting 20 minutes for their turn, and it prevents the room from treating online questions as a lower tier. Reading the question aloud means the room hears what the panel is answering, which matters because remote questions otherwise arrive silently. Addressing the camera tells the asker the answer is for them. Naming the delay out loud turns an apparent malfunction into a known procedure.

Several habits make the structure easier to run.

Ask remote attendees to write questions in full sentences and to sign them with a name and organization. A question that reads "dues?" cannot be read aloud and answered, while "Our dues are flat at $300 and we lost 6 members last year; should we move to tiers?" can. Tell the audience this at the start, in one sentence, and the quality of the queue improves within minutes.

Let remote attendees raise their own audio only when the remote moderator invites them, and ask the moderator to say the person's name and organization before unmuting. A remote participant who is unmuted without warning is as startling as a stranger who walks to the front of the room. A remote participant who is invited by name speaks with confidence. If the asker's audio fails, the moderator reads the question and the session continues.

Keep one question from the floor ahead of the first remote question, not after. The room needs to see that the remote queue is part of the same line, and the remote audience needs to hear the room's questions repeated for them. The moderator who repeats floor questions into the microphone is doing the job of a good radio host, and the remote audience will notice when it stops.

When the room starts to take a topic over, and a hybrid panel will, the remote moderator uses the private channel to write "Remote queue has 6 waiting, 3 on dues." The session moderator then finishes the thread and turns to the screen. That sentence in the private channel has rescued more sessions than any piece of equipment I own.

Close the Q&A on a remote voice. The last question of the session should come from the queue, and the last thank-you should include the camera. It is a small courtesy, and it is what remote attendees quote back in their feedback.

Moderate the chat as you would moderate a room. State at the start that the chat is public to all attendees, that questions go in the question box and that sales pitches will be removed. Assign the remote moderator authority to delete a message, and agree on a sentence to use when they do: "I've removed a comment that was off topic; please keep the chat to the session." A chat that fills with side talk buries the questions the remote audience came to ask.

Consent belongs in the same opening. Tell the room that the session is streamed and recorded, and tell the remote audience whether their names and questions appear in the recording. A member who does not want to be

on camera can sit in a section the camera does not cover, and a remote member who does not want their question read aloud can ask the moderator to read it without their name. Offering that choice costs a sentence, and it prevents a complaint that is hard to answer afterward.

6

TROUBLESHOOTING THE MOST COMMON FAILURES

A volunteer moderator can fix most hybrid failures without calling a technician, if they know the first response for each. Five fixes cover most of what goes wrong.

- **Audio delay disrupting Q&A**: switch to the moderator-reads-the-question structure above rather than attempting live back-and-forth through the delay.
- **Remote-audience dead air**: confirm the remote moderator has a working, tested audio feed before the session starts. Dead air is more often a monitoring failure than an equipment failure.
- **The room forgetting the camera**: assign the two-moderator model described above. A single reminder mid-session rarely fixes a pattern that's already set in.
- **Remote attendees unable to see visual aids**: confirm slides or visual aids are shared through the remote platform directly, not only visible on an in-room screen the camera happens to capture at an angle.
- **Presenters speaking only to the room**: brief every presenter beforehand, specifically naming the camera as a full participant in the room, not a formality to acknowledge once at the start.

When a failure is not on that list, work from what the remote attendee reports. The table below maps the symptom to its most likely cause and to the check I run first. It is ordered by how often I meet each one.

WHAT THE REMOTE ATTENDEE REPORTS	MOST LIKELY CAUSE	FIRST CHECK
"I can't hear the person at the back"	Floor questions asked without a microphone	Hand the microphone to the asker, and ask the moderator to repeat the question
"I hear an echo of my own voice"	Remote audio is looping back through the room microphone	Mute the remote participant, then check the mixer's mix-minus
"The slides are tiny"	The camera is filming the screen at an angle	Share the slides through the platform, not the camera
"The video freezes every few minutes"	Shared or wireless network	Move the feed to a wired connection and close other uplink uses
"Nobody answered my question"	The queue was not watched	Check that the remote moderator is seated and the private channel is open
"I can see only the speaker's back"	Camera too far to the side or too low	Move the camera to eye height beside the confidence monitor

Table 6. Symptom, likely cause and first check, in order of how often each occurs.

Two rules sit on top of the table. First, fix the audio before anything else, because the remote audience will tolerate a frozen frame but not a voice they cannot hear. Second, say aloud what you are doing: "We've lost the remote audio and we are fixing it; we'll pause for two minutes." A visible, spoken fix keeps the remote audience in the session, and a silent one loses them.

A WORKED EXAMPLE: AN ECHO AT A COMMITTEE CALL, 2025

In February 2025 the institute's standards committee, with 9 members in a Miami conference room and 7 online, began a 60-minute call with a loud echo on the remote side. Every time an in-room member spoke, the remote members heard a second voice a third of a second behind the first. Two remote members turned off their cameras within five minutes, which is a reliable sign they have stopped following.

The cause was a speakerphone left on the table beside the new microphone array. The array was sending the room to the remote side, and the speakerphone was picking up the remote voices, playing them into the room and sending them back out. My remote moderator wrote "echo on remote side, suspect speakerphone" in the private channel. I paused, unplugged the speakerphone, and restarted the call with a two-sentence

explanation. Total lost time was four minutes, and all 16 members stayed to the end.

The repair worked because the problem was diagnosed in the room's own terms. The remote moderator knew what the remote side was hearing, which the session moderator could never have known. Since that call, the first line of my room checklist reads "one audio device per room, no exceptions."

Plan a fallback before the day. I keep a telephone dial-in number on every hybrid invitation, and I tell the remote moderator that if the video platform fails for more than three minutes, the session continues on the dial-in with the slides emailed. In the hundred-plus hybrid sessions I have run, I have needed it five times. Each time the remote audience stayed on the call, and the slides reached their inboxes before the next speaker finished.

7

BUDGETING FOR HYBRID WITHOUT A FULL PRODUCTION CONTRACT

Pick the lightest production tier your session can safely use, and cost it before you ask anyone for money. Not every chapter or committee meeting justifies a full-service production contract with an outside vendor. One of the most common mistakes new hybrid organizers make is assuming the choice is binary, full production contract or nothing. A monthly chapter roundtable and a national forum have genuinely different production needs, and the minimum viable setup described above is enough for the former.

A rough tiering, based on session type:

- **Monthly chapter roundtable or committee call**: minimum viable setup, run by existing staff, no outside vendor needed.
- **A single-day forum or workshop**: minimum viable setup plus a part-time audiovisual technician for the day, either an internal staff member with relevant experience or a local freelance hire.
- **A multi-day summit or conference with hybrid general sessions**: a full production vendor contract, since the stakes of a technical failure during a keynote or plenary session are high enough to justify the cost, and the complexity of managing multiple concurrent sessions exceeds what internal staff can reliably run alongside their other event responsibilities.

Chapters new to hybrid meetings should start at the first tier and only move to the second or third as session complexity and audience size genuinely warrant it, rather than assuming a first hybrid attempt requires the top tier to succeed. The table below puts typical figures against each tier, drawn from sessions at the institute and from the chapters and member associations that have shared their numbers with me.

Table 7. Three production tiers with typical staffing and cost.

TIER	SESSION	STAFFING	EQUIPMENT AND COST	TYPICAL COST FOR THE SESSION
1	Roundtable or committee call, up to 40 people	Existing staff plus a remote moderator	Owned or borrowed kit, or about $2,000 one time	$0 once the kit is owned
2	One-day forum or workshop, up to 150 people	Staff plus a technician for the day at $450 to $700	Tier 1 kit plus a second microphone and a captioning service	$900 to $2,500
3	Multi-day summit with hybrid plenaries	Production vendor with a crew, plus a staff producer	Vendor-supplied cameras, switching and encoders	$9,000 and up

A fourth question sits under every tier: who pays. Some associations charge remote attendees a lower registration fee and treat hybrid as a revenue line. Others fold remote access into members' dues and run it at a loss. I have no single answer, and the example below shows one small association's arithmetic.

A WORKED EXAMPLE: THE ROCKY MOUNTAIN OUTFITTERS AND GUIDES COUNCIL, 2025

The Rocky Mountain Outfitters and Guides Council, with 420 licensed outfitters and a staff of two in Cheyenne, ran its annual meeting in January 2025. The year before, the meeting had been in person only and drew 74 attendees. Many members cannot leave a lodge or a guiding season on short notice, so executive director Hollis Greenleaf priced a hybrid format.

A full-production quote came in at $9,800, more than the $8,880 the 2024 meeting took in registrations at $120 a seat. Greenleaf chose Tier 2 instead and bought a kit for $1,850: a conferencing camera bar at $690, two wireless handhelds at $420, a four-channel mixer at $210, a 27-inch monitor at $240, and $290 of cables and stands. He hired a freelance technician for the day at $600 and booked live captions for $350, so the first-year cost came to $2,800.

Fifty-eight people attended in Cheyenne at $120 and 71 joined online at $45, so registrations brought in $6,960 and $3,195, or $10,155 in all. Total attendance was 129, against 74 the year before, and 12 of the remote registrants had attended in person in 2024. After the $2,800 of hybrid costs the meeting netted $7,355 from registrations, $1,525 less than the year before. The kit is now owned, so a second year with the same technician, the same captions and the same attendance would net $9,205, which is $325 more.

Greenleaf's order of purchase is the one I recommend. Audio first, then the camera, then the monitor that lets a presenter see the screen. The council joined the Southeast shared-services pilot remotely in 2025, the kind of arrangement that lets small staffs pool a kit like this one.

Before you sign any vendor contract at Tier 3, ask each vendor the questions below. A vendor who cannot answer them in writing has not run the kind of session you need.

- [ ] How many people on the vendor's crew will be on site, and who is the named producer for our session?
- [ ] What is the audio plan for questions from the floor, and who will carry the microphone?
- [ ] How does remote audio reach the room speakers without echo, and has the vendor tested it in this room?
- [ ] What happens if the primary internet link fails, and is there a second, independent link?
- [ ] Are live captions included, and who delivers the transcript after the session?
- [ ] When will the recording be delivered, and is it edited to keep the Q&A?
- [ ] What is the cancellation and postponement fee, in dollars, if the session moves?

> “I have two staff and one folding table. The money went to a microphone before it went to a camera, and that was the right order.

HOLLIS GREENLEAF, EXECUTIVE DIRECTOR, ROCKY MOUNTAIN OUTFITTERS AND GUIDES COUNCIL

8

WHAT REMOTE ATTENDEES ACTUALLY WANT, AND WHAT TO DO WITH THE RECORDING

What remote attendees rate highly is not what organizers worry about first, and the recording extends the session to people who never joined. Both parts of this section follow from that.

WHAT REMOTE ATTENDEES ACTUALLY WANT, BASED ON FEEDBACK

My institute collects post-session feedback specifically from remote attendees, separate from general session feedback, and the pattern across several years is consistent: remote attendees rank being able to ask a question and get a genuine, timely answer well above production quality. A remote attendee who successfully asks a question and receives a thoughtful response rates the session highly even when the video quality was modest. A remote attendee who watched a polished broadcast but never got a question answered rates the same production quality lower.

This finding is the reason the playbook puts the two-moderator model ahead of equipment. New organizers worry first about picture quality, while remote attendees remember whether anyone answered them.

The remote survey is short, because remote attendees have already spent the session at a screen. It has four questions, and I send it within two hours of the close, while the session is fresh. About 38 percent of remote attendees reply, against fewer than 20 percent of in-room attendees on paper forms.

- Could you hear every speaker clearly? (Yes, mostly, no)
- Did you ask a question or want to? (Asked and was answered, asked and was not answered, wanted to and did not, did not want to)
- Did the room make you feel like part of the session? (Scale of 1 to 5)
- What one change would have made the session better for you? (Open text)

The second question is the one that tells me the most. A session where 20 percent of remote attendees report "wanted to and did not" has a moderation problem, and no investment in cameras will repair it. I read the

open-text answers aloud at the next planning meeting, because a sentence from an attendee persuades a committee more reliably than a statistic does.

RECORDING AND POST-SESSION ACCESS

Most hybrid sessions produce a recording as a byproduct of the remote feed, and I recommend treating that recording deliberately rather than as an afterthought. Post the recording within 48 hours where feasible. Interest in a session drops sharply after the first week, and a recording posted a month later gets a fraction of the views one posted promptly would.

At the institute, a 2024 session posted two days after it ran drew 412 views in its first fortnight. A comparable session in 2023 that waited five weeks drew 97. The content and the audience were similar, and only the delay differed.

Recordings should preserve the remote Q&A exchanges, not just the presentation content, since the back-and-forth between the audience and the panel is often what attendees who missed the live session find most useful. A recording edited down to only the prepared remarks loses exactly the interactive content this playbook's two-moderator model is designed to produce. If you must trim, trim the housekeeping and the technical pauses, and keep every question and answer.

A few practical rules finish the job. Tell every participant, in the invitation and again at the start, that the session is recorded and who will see it. Publish the caption file with the recording, and add a short list of timestamps so a viewer can jump to the question they care about. Decide before the session how long the recording stays up, and say so on the page that hosts it.

9
A PRE-SESSION CHECKLIST

Print this page and hand it to both moderators. Work through the first list the day before, and the second list thirty minutes before the doors open.

The day before:

- [ ] Remote moderator assigned and briefed separately from the in-person session moderator
- [ ] Both moderators briefed together for fifteen minutes, with the three signals agreed
- [ ] Every agenda item marked with its remote input moment, and at least one item built around real remote discussion, not an open closing question
- [ ] The private channel between the two moderators created and tested
- [ ] A dial-in number added to the invitation and tested as a fallback
- [ ] Captions booked, and the presenters told that captioning is on
- [ ] Start time checked against the westernmost registrant's local time
- [ ] Wired network confirmed with the venue, with 10 megabits per second of upload set aside

Thirty minutes before the session:

- [ ] Room and remote audio chain tested, room mic to remote feed and back
- [ ] Remote moderator seated with a working audio feed and the private channel open
- [ ] Visual aids confirmed to display correctly on the remote platform, not only on the in-room screen
- [ ] Presenters briefed to address the camera directly during Q&A, not only the physical room

Chapters and committees that run this checklist before every hybrid session report noticeably fewer complaints from remote attendees in post-session feedback. The committees that leave setup to whoever happens to

be comfortable with the equipment hear more of them. The pattern holds at every tier, and the lists take about twenty minutes to work through.

If you take only one action from this playbook, make it the first line of the day-before list. Assign a person to the remote audience, introduce them to the room by name, and give them a private line to the moderator. Everything else in this guide builds on that decision.

10
WHERE TO GO NEXT

Several NANA programs let you practice, borrow expertise or share the work with other meetings staff, and none of them requires a production budget.

Start with your own chapter, whose regular meeting is a low-stakes place to try a Tier 1 hybrid format. The Great Lakes chapter meets on the third Thursday each month, the Southeast chapter on the first Wednesday, and Greater Boston on the second Tuesday with a virtual option every month. The Mid-Atlantic chapter holds a briefing every other month, and the Pacific Northwest and Rocky Mountain chapters meet quarterly. Offer to run the remote seat for a session and use the equity checklist in section 2 as your agenda review.

Learn from the people who run NANA's larger meetings. Rosalind Kettering's meetings and events team runs the Leadership Summit, the Fall Policy Forum in Washington each November and Advocacy Day each April. The Fall Policy Forum and Advocacy Day use outside production for their hybrid sessions, and watching a Tier 3 session from the back of the room is a quick way to see what the top tier buys.

The Pacific Northwest chapter's remote-first staffing peer group is the place to compare notes with associations whose staff are scattered by default. The Chapter Leadership Intensive in Boston each October is the right room for incoming chapter officers who will inherit a hybrid calendar.

Bring your questions to NANA's Learning catalog as well, which lists live and on-demand sessions on meetings and events, and to the meetings team itself. If your chapter is thinking about shared staff or shared equipment, the Southeast shared-services pilot is the working model: five small associations began sharing a finance manager, an events coordinator and an AMS license in 2023, and a kit like Hollis Greenleaf's is the kind of asset such a group can pool.

APPENDIX: A RUN-OF-SHOW FOR A 90-MINUTE HYBRID SESSION

Copy the table below into your agenda and change the segment names. It builds in a remote input window after each presentation, and it sizes the

Q&A at the 40 percent premium from section 2. Times run from the scheduled start, and the minutes in the rows from Welcome onward add up to 90. The test and the lobby row come before the start.

Table 8. A 90-minute run-of-show with the remote moderator's cue in each row.

CLOCK	MINUTES	SEGMENT	SESSION MODERATOR	REMOTE MODERATOR
-0:30	30	Audio chain test and remote paragraph read	Walks the room with the handheld	Listens from the remote side and reports
-0:15	15	Remote lobby opens	Greets people in the room	Posts the welcome, the dial-in number and the question rules
0:00	3	Welcome	Opens, introduces the remote moderator by name	Waves at the camera
0:03	2	Housekeeping	States recording notice and how to ask	Pastes the same text in chat
0:05	20	Presentation 1	Chairs	Collects questions
0:25	5	Remote input window 1	Reads two remote questions	Queues and sorts
0:30	20	Presentation 2 or panel	Chairs	Collects questions
0:50	5	Remote input window 2	Reads two remote questions	Queues and sorts
0:55	25	Q&A, alternating floor and remote	Reads each remote question aloud	Marks the next remote question
1:20	5	Close	Names the next step, thanks the camera	Posts the survey link and the recording date
1:25	5	Moderators' debrief	Notes what to repair	Reports questions left unanswered

Notice the shape. The prepared content takes 40 of the 90 minutes. The two remote input windows take 10 and the Q&A takes 25, and the remaining 15 go to the welcome, the housekeeping, the close and the moderators' debrief. That ratio looks generous to anyone who has chaired a room-only meeting, and it is the reason the remote audience stays.

After the session, send the survey within two hours, post the recording within 48 hours and add the Q&A timestamps to the page. File the moderators' notes with the agenda so that the next committee chair begins from the repairs and not from a blank page.



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