

## Virtual Participation at Bellagio

March 2022

### Introduction

We are thrilled that the Bellagio Center has reopened for in-person convenings and residencies following months of closure during the COVID-19 pandemic. We also recognize that the nature of convening itself has changed in that time, and that many individuals invited to convene at Bellagio may be unable to travel due to dynamic personal and logistical circumstances. In this context, our team is often asked to provide guidance on how to incorporate virtual participation into Bellagio Center convenings.

This guide contains our recommendations and best practices for designing hybrid convenings with intention. We hope it helps you produce a meaningful participant experience, both for those in the room and those who join virtually.

### General Considerations

Including virtual participants at Bellagio should be an intentional choice. This section covers a few general considerations as you plan your upcoming convening.

**Choosing Hybrid:** As you design your convening and consider incorporating virtual elements, we recommend that you ask the following questions:

- What is to be gained by incorporating moments of hybrid participation into the convening design?
- What could potentially be lost by choosing a hybrid convening approach over a fully in-person design?

**Time:** If you do choose to utilize a hybrid format, be intentional about how much time you will allocate to sessions that incorporate virtual participation.

- Try to limit virtual participation to no more than 45 minutes in a single day. Even better if it can be truncated into smaller 15 to 20-minute segments.
- Be explicit with timing. 45 seconds for comments and 7 minutes for presentations is a good rule of thumb to facilitate maximum engagement.

**Goal:** Be sure to establish a clear goal for each virtual speaker or participant.

- For any keynotes that are delivered virtually or sessions that include hybrid dialogue, it is often helpful to establish a clear and specific goal ahead of time. This gives each session a singular focus and aim to design around.
- Keep the goal modest. For example, teach one lesson or give two points of feedback.

## Virtual Participant Considerations

We recommend that you identify specific roles for virtual participants to play during the convening. The following roles work well for individuals who cannot be physically present.

- **Wisdom Council or Critical Sounding Board:** Consider inviting outside experts as helpful judges or evaluators of emergent ideas. In-person participants may “phone an expert” at predetermined times throughout the week, with the purpose of sharing a challenge they are grappling with or of requesting feedback on a specific exercise. This style session provides in-person attendees an opportunity to zoom out and pressure test how their nascent ideas might resonate with a wider audience. Insights from these sessions can then be shared back with the full in-person group to further refine thinking in a way that incorporates a broader perspective.
- **Subject Matter Expert Presentation:** When bringing in a virtual speaker, we advise that the selected speaker(s) meet two requirements. First, their expertise or knowledge base is rare, unique, or special and that the participants would not otherwise have access to the content knowledge or perspective within the room or pre-event materials. Second, the speaker should be highly dynamic and engaging. Specifically, we recommend:
  - Avoiding the presentation of slides; instead, consider offering an audience question and answer component to maintain high engagement.
  - A pre-event speaker prep call to orient the speaker to the overarching convening purpose and tone.

We can also offer the following tips for those delivering virtual keynotes or presentations.

- **Shrink Your Screen:** Shrink your screen to mimic distance in real life between people. Your video screen on the laptop should be no bigger than the size of two smart phone screens side by side.
- **Use an External Camera:** If you're able to, use an external camera so you can augment depth perception untethered from the screen itself. Ideally, the camera would be set up slightly behind computer.
- **Adjust Camera Height:** The best view is a slight downward-looking camera (opposite of a chin-shot) that mimics real life depth perception bias of the visual cortex. The most optimal camera angle is to set your camera up about 6 inches above eye level and then direct it back down.

## In-Person Participant Considerations

Assigning distinct roles to in-person attendees can help to bridge the experience of all participants in a hybrid setting. The following roles may be played by any participant who is physically present.

- **Chat Monitor:** Consider designating an in-person participant to monitor the chat to ensure that virtual attendee voices and perspectives are consistently heard.
- **Audience Ambassador:** Consider designating an audience representative to act as liaison. It's awkward to address a room—especially of strangers—via zoom. To lessen the

strangeness, appoint a room ambassador who fields room questions to the virtual participant(s).

- **1:1 Buddy:** Consider assigning an in-person buddy to each virtual participant to ensure they have someone paying attention to their needs in terms of sound, resources, and communication.

## Facilitator Considerations

The convening facilitator is responsible for ensuring seamless engagement across in-person and virtual participants, and for ultimately anchoring the full program to the convening purpose.

Preparing for Bellagio:

- **Plan in Advance:** Ensure the facilitator is familiar with the role virtual participants will play well in advance of the convening. This individual should be fully prepared to engage both in-person and virtual participants in a way that supports the convening's purpose.
- **Schedule a Pre-Meeting Check In:** A brief meet & greet between the facilitator and virtual attendee(s) to build rapport, align on convening purpose, and review overall tone of the convening will meaningfully impact the resulting attendee experience.
- **Off-Load Introductions:** Introductions via bios sent beforehand work well when time is of the essence and there is a desire to keep energy high. It also means the call can start with momentum, avoiding the risk of drag at the outset.

Beginning with Intention:

- **Make the Implicit Explicit:** Name the expectations for your hybrid sessions and clearly outline the logistics and rules of engagement for everyone involved. If there's time, we recommend co-creating norms with the group.
- **Alternate Contributions:** If a hybrid dialogue is required, alternate who is called on to speak between in-person and virtual contributors. Set the tone for this model by beginning with introductions that move back and forth between participant modes.

Leading the Discussion:

- **Be Proactive:** In a hybrid dialogue, the facilitator should be more intentional about inviting virtual members to speak up. They should create moments to check in with virtual attendees to see if there are questions.
- **Mix Participants:** When designing small group discussions, consider which sessions might benefit from "all in-person" and "all virtual" groups, and which sessions might benefit from pairings (i.e., one in-person participant paired with a virtual participant) to create cohesion across the group as a whole.
- **Learn and Adjust:** Expect things to go wrong or feel difficult. Plan moments to reflect, learn, and adjust quickly after your first hybrid session and at the end of each day.

## Room Setup Considerations

The physical layout of the room can facilitate or hinder successful virtual participation.

- **Consult with the On-Site Team:** Your conference coordinator at the Bellagio Center plays a critical role in your convening, and virtual participation is no exception. Discuss any needs for video conferencing equipment in advance with the team on-site in Italy.
- **Seating Arrangement:** Place chairs in a semi-circle facing the screen. This is much more conducive to hybrid dialogue than a circle with the screen on the outside.
- **Consider a Device Per Person:** If there will be a hybrid dialogue, you may consider having all participants sign into the video conferencing platform, so that there is a video square for each participant. Participants joining in-person mute their computers and turn down their volume for the best audio result. You may also consider inviting in-person attendees to find a location around the space where they'd like to sit (separately).
- **Camera Placement:** For sessions with a presenter, consider how cameras might be set up to create a sense of intimacy for virtual participants. Ensure that speakers cannot see themselves on other screens in room.
- **Create a Digital Mirror:** Consider replicating the in-room layout in a virtual whiteboard. If there are visual cues in the room, put them in a virtual space.
- **Split the Experience:** If the convening groups get larger than 10-12 people, consider having a remote-first experience with a dedicated remote facilitator, and re-build the in-room materials in a virtual whiteboard to promote balanced participation.