



A PROCESS GUIDE FOR CONDUCTING HYBRID MEETINGS

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TOASTMASTERS
INTERNATIONAL®

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A quick note about this guide...

So you have decided you are going to hold hybrid meetings. That's a big decision! If you haven't already done so, then I suggest that you review my *Decision Guide for Hybrid Meetings* and my *A User's Guide for Conducting Hybrid Meetings*, available from my website – www.dana4id.com -- as well as resources available on the Toastmasters International website. If you have, and you have decided to move forward, then this guide may help you work through the processes and procedures before, during, and after the meeting that will help you be successful. When conducting high quality hybrid meetings, the details are important, and I've tried to identify as many of them as possible to help you be successful. I hope it's not overwhelming, but there are a lot of them! There is also a lot of variation in meeting locations, equipment, and club and personal preferences that will be unique to your situation. Use this guide, and the other ones I mentioned, as starting points, then modify, add to, and/or delete from what I have here to suit your needs.

Best wishes for your continued success!



A handwritten signature in blue ink, appearing to read "Dana".

Dana

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Contents

Pre-meeting/organizing 1

- Is there Wi-Fi access? 2
- What meeting application is being used? (Zoom, MS Teams, Google Meets, Skype, Webex, other)..... 2
- What/whose account is being used? (personal, club, district, company or agency, etc.) 2
- How is the account scheduled? 2
- What resources are available at the onsite, physical, meeting location? 3

Set-up 4

- Host computer 5
- Cameras 5
- Monitors and projection equipment 6

During the Meeting 7

- General guidelines 7
- “How do I use a microphone?” 8
 - Lavalier: 8
 - Handheld microphone: 8
 - Lectern microphone or stand microphone: 8
 - Conference microphone 8
- “Do we need more than one microphone?” 9
- Wired vs. wireless microphones 9
- How to best use available computer displays..... 9
- Meeting agendas..... 10

Modifications to meeting roles and new roles 10

- New Roles 10
 - Web Host (also sometimes referred to as a Zoom Host)..... 10
 - Chat Monitor 11
 - Technical/A-V Support 11
- Modifications to Traditional Meeting Roles 11
 - Toastmaster 12
 - Timer 12
 - General Evaluator and Table Topics Master 12
 - Evaluations and Reports 13

Break-down/Packing Up 13

There are roughly four phases for any Toastmasters meeting whether entirely on-site or a hybrid:

- Pre-meeting--planning/organizing
- Set-up
- During the Meeting
- Break-down

The differences are found in what is included in these roles. A general overview of what each phase does for a hybrid meeting is in the table below. The difference between Spectacular Success and Frustrating Failure lies in the details that follow, and there are a lot of them. The more components you add to a meeting, and doing a hybrid meeting adds lots of components, the more complex all aspects of the meeting become. The complexity is unavoidable but doesn't have to be overwhelming with good planning and organization.

Pre-meeting planning and organizing	Onsite meeting set-up	During the meeting	Post meeting/break-down and clean up
Answering questions to ensure: <ul style="list-style-type: none"> • Right equipment is available • Participants are able to access the meeting, • A meeting with on-line participants is realistically possible. 	Setting up equipment: <ul style="list-style-type: none"> • Host computer with microphones and speaker • Cameras • Monitors or projection equipment 	Run <i>generally</i> the same as entirely in-person meetings, with exceptions: <ul style="list-style-type: none"> • Audience is both on-site and remote • Modifications to some roles and additional new roles • Requires a virtual "gate keeper" in addition to SAA 	Critically important since breaking down is the first step toward successfully setting up the next meeting: <ul style="list-style-type: none"> • Account for all equipment • Properly pack everything • Keep track of cables and what they go with

Pre-meeting/organizing

A successful hybrid meeting, just like any other successful Toastmasters' meeting, begins during the planning and organizing stage before the meeting. There are many questions that need to be answered during the planning stage to ensure that the right equipment is available, that participants are able to access the meeting, and that a meeting with on-line participants is even realistically possible.

Things to think about during meeting planning are:

Is there Wi-Fi access?

- Yes:
 - Is it secured or unsecured/public?
 - Is the risk of using unsecured Wi-Fi acceptable?
 - Does the host system have security measures, such as VPN, for protection while on an unsecured network?
 - Is it reliable?
 - Will the available bandwidth limit meeting options, such as video?
- No:
 - Will a member be establishing a “hotspot” or “MyFi” for access?
 - Is it reliable?
 - Will available bandwidth limit meeting options?
 - Can more than one member establish a hotspot so that multiple computers can be supported?

What meeting application is being used? (Zoom, MS Teams, Google Meets, Skype, Webex, other)

- Is the same app used for each meeting or does it vary depending on who is hosting and/or where the meeting is being held?
- Do members understand how the application works?
 - The applications are very similar, but not identical, and the differences in capability, settings, and features can be confusing.
 - If possible, always use the same application even if not always the same account.
 - Make sure members have an opportunity to receive instruction on the basics of whatever app is being used.

What/whose account is being used? (personal, club, district, company or agency, etc.)

- Who owns it? Is permission required to use it? Must its use be scheduled?
 - As with the type of app, will the link be the same each time (which will require security measures to protect the meeting, see below) or generated specifically for each meeting (more secure, but requires that all members and guest know that the link will be different each meeting and are looking for it.

How is the account scheduled?

- Can an individual member set-up the meeting or must they work through a scheduler (as might be necessary for some corporate clubs):
 - What is the contact information for the scheduler?
 - What forms, if any, must be completed?
 - Can the meeting be “bumped”
 - What is the back-up plan if it is?
 - What are the required security measures (password, waiting room, other)?
 - Make sure members and guests know what these measures are and how to access the meeting because of them.

- Make sure that the link, phone number, passwords (if required) are communicated to all members and guests far enough in advance to make sure everybody has them—make sure you know how members receive information and that they all know how this information will be passed to them, i.e., e-mail, text, club website (many clubs post the link on the agenda or webpage that can only be accessed by members).

What resources are available at the onsite, physical, meeting location?

- Some locations may have fully equipped virtual teleconference (VTC) capabilities available, and your club might be able to use those. If so, training may be required. If this equipment is available, make sure that links to meeting applications are available and that remote participants will be able to join and have the information they need to join.
 - A computer with Internet access?
 - A monitor?
 - A projection screen?
 - A projector?
 - Speakers?
 - Can these be used without causing feedback through the host computer microphones?
 - If not, are auxiliary speakers needed/available to ensure on-site meeting participants are able to hear remote participants?
 - Microphones:
 - Yes:
 - Can it/they be used for the meeting application or are they only for in-room A/V?
 - i.e., do they only work with the speakers within the room or can they also be used to transmit to remote participants?
 - If the in-room microphone does not work to transmit to remote participants then an microphone, either external or organic to the host laptop or camera, will need to be used.
 - No: Microphones will need to be used to ensure remote participants can hear the meeting's on-site participants. There are multiple ways to do this, please consult *A User's Guide for Conducting Hybrid Meetings* for discussion on microphones.
 - Are you allowed to use the on-site resources?
 - If not, are you allowed to bring in and use your own equipment and what are the rules for doing so?
 - If you use your own equipment, can this be in addition to or instead of on-site equipment?

Example: We conducted a meeting at a Chamber of Commerce conference room which had A/v equipment and a laptop with Internet access on site. We were not allowed to attach our equipment to theirs but we were allowed to access the meeting using our application (Zoom in this case) and have the remote participants projected onto a large screen using conference room's laptop and projector. This meant we did not need to set-up a separate screen and projector (we did have these available, just in case).

We then ran separate external microphones, audio speakers and cameras through a member's laptop which allowed us to transmit the speeches and other meeting audio to the remote participants. We turned off the conference room's audio speakers and used our own attached to the same laptop as the microphone (a wireless receiver/transmitter system) to ensure we did not get feedback.

This arrangement worked well for us, somewhat simplified our set-up and ensured that participants in the room could see and hear the remote participants, and that the remote participants could see and hear the on-site speakers and participants. Most relevant to this discussion—this arrangement was known and planned prior to the actual meeting, but a back-up plan was also in place in case the projection in the room was not available for some reason (a projector and portable screen).

Set-up

Once the plan has been made, participants and equipment will arrive at the room early and hopefully nothing will be missing. Here are a couple of hints:

- Prepare a checklist of all equipment and accessories that will be needed (there is one in the user's guide that can be modified for your own use) and *make sure you use it!* A checklist only helps when it is actually used, and can be very helpful in making sure small, but really important, details don't get overlooked.
- Always have a back-up plan for when something does get forgotten, or doesn't work, or can't be used at that location for some reason—because sooner or later this will happen!

I am not going to rehash the details of the user's guide for the equipment that is required. Rather, this discussion will focus on the physical, on-site act of setting it up. Generally, there are four major components of set-up for a hybrid meeting (not counting typical meeting set-up handled by the sergeant at arms such as the club banner, guest books, gavel, lectern, and meeting materials):

- Projection of remote participants for viewing in the meeting room/on-site location
- Cameras to project on-site participants
- Microphones to transmit on-site speeches to remote participants

- Audio speakers so on-site participants can hear remote participants.

The significance of this is less about how many people are required for set-up, than it is about how many people can efficiently participate in set-up. The primary set-up responsibilities revolve around setting up equipment that allows all four of these components to work. These, loosely, are:

- Host computer with microphones and speakers
- Cameras
- Monitors or projection equipment

Host computer

The meeting will need a host computer (in most cases this will be a member's laptop) which will be the hub for the meeting. Again, without going into details covered in the user's guide, this computer will be used for the following:

- Hosting the meeting and acting as a gateway for meeting participants—participants will be admitted to, and if necessary expelled from, the meeting from this system; muted and unmuted as necessary, and the chat room may be monitored from here (although chat can actually be done by a different member from a separate computer if that works better for your club). This makes the person sitting at this computer essentially a “virtual sergeant at arms.”
- A/V support—microphones and external speakers will be attached to this computer and in all likelihood, *only* this computer.
- Meeting technical support—helping members with screen sharing, break-out rooms, whiteboards or other virtual support that may be needed during the meeting.
- If possible, avoid assigning other meeting roles to whomever is providing this support as they must be continually monitoring the meeting and assisting members with technology throughout the meeting.

Given the central role this computer plays, it and everything attached to it will likely be set-up by the member running them, who we can call the “webhost,” and other than placing mikes and arranging speakers, there may not be much additional assistance required.

Cameras

Unlike microphones and speakers, (which will generally need to be attached to the same computer to prevent feedback), any number of cameras can be used attached to (or integrated with) other computers, which means that other participants can help by placing these and setting them up while the webhost works on the host computer, microphones, and speakers. How many cameras are needed is a variable. At a minimum there needs to be one that captures the speaking area.

- One camera should be attached to the host computer. The advantage of having the camera and microphone on the same computer is that on most meeting applications the display will feature whoever is speaking—that is, the computer to which the

microphone is attached, so it simplifies things to have the camera on the same computer so that the audio and video are both capturing the speaking area. (This is not a requirement from a technology standpoint, but it simplifies meeting management for the webhost and remote participants.)

- Additional cameras, and/or the computers to which they are attached, can be placed around the meeting location to help remote participants see the on-site members. How many will depend on the size of the meeting location, how many participants are present, and how many cameras and computers are available. Each camera will need to be associated with a single computer, but there's no limit on how many can be used, unlike microphones and audio speakers which are limited due to possible feedback issues. Using multiple cameras allows you to capture meeting visuals from multiple angles and provides the remote audience a view of more of the audience.
- Cameras will probably need tripods to create flexibility, and optimization, for their placement.
- If possible, arrange seating and ask members to arrange themselves to simplify/optimize the camera arrangement.

A computer's integrated camera can be used for many of these purposes. The key point to consider is how much the camera shows, and how clearly it shows it. The better the quality of the camera, the better the images it produces. This is an especially important consideration for the speaking area when the better the speaker's expressions and gestures can be seen by remote participants, the more enjoyable the experience will be for them and, for evaluators, the more effectively they can provide feedback.

Monitors and projection equipment

In addition to making sure that remote participants can see the in-person participants, they remote participants also need to be seen and heard by participants at the meeting location. This means that a monitor or a projector with a screen (or surface, such as a wall) will be needed to bring the remote participants into the room. This can be handled in several different ways.

- If the meeting location has a computer with an attached projection capability, then all that is required is to log-in that computer into the meeting, if this allowed.
- If there is no computer, or if using it is not allowed, then it might be possible to connect a participant's computer to the equipment.
- And, of course, if there is no equipment or if using it is not allowed, then the participants will need to bring their own monitor (awkward if it needs to be very large) or at least a projector and possibly a portable projection screen as well (one that rolls up or folds, or otherwise is designed to be portable).
- While the projection equipment can be attached to the host computer, it is not necessary that it be. The sole purpose is to project a video image of remote participants.

- Since this does not need to be on the host computer, a participant other than the webhost can set this up or arrange for the resident system to be logged on to join the meeting. Relieving the webhost of this responsibility will reduce overall set-up time.
- If the meeting location does have a monitor and you are using it to see remote members, then it likely also has speakers or is attached to an A/V system with speakers. It might be possible to use this capability to hear remote speakers without generating feedback, sometimes it is depending on the A/V configuration and your meeting set-up, but it is also quite possible that it will generate feedback. Accordingly, be prepared to mute or disable the monitors speakers and use a separate set of speakers attached to the host computer.

At some point prior to the meeting, the webhost will need to open the virtual meeting so that remote participants can join it before the actual meeting starts. Ideally, all set-up actions that must be done by the webhost should be completed first because their duties will turn to admitting participants to the meeting, providing technical assistance, and monitoring for potential disruptions. If possible, allow at least 15 minutes for participants to join the meeting, work out any technology issues they might have and ensure they can complete actions, such as sharing their screens, and allow time to answer questions.

During the Meeting

Once set-up is complete, hopefully prior to the scheduled start time, the meeting can start. Generally these meetings will be run the same as entirely in-person meetings and most meeting roles will be conducted the same as if everybody was present at the meeting location. However, there are some differences that can be quite important and this section will identify many of them, you might identify more as you conduct your own hybrid meetings. We'll begin with general guidelines that apply to all participants, and then identify how some roles might be modified and other roles that are unique to these meetings.

General guidelines

In a hybrid meeting, the audience includes those in the room and those on-line, speakers are most effective when they address both. Not *just* the live audience and not *just* the remote audience.

- One of my clubs did a hybrid meeting at a winery. One of the most interesting dynamics we noticed, this being the first hybrid meeting most of us had done, was a tendency to look at and talk to the camera—just as we have mostly learned to do when meeting entirely on-line, and resulting in rarely making eye contact with the in-person audience.
- The next meeting I did was for a different club with the opposite dynamic – speakers talked to the in-person audience, but not the camera. At one point, a speaker, in an effort to connect with the remote audience, actually turned to look at their images on the screen behind him, thus turning his back to the camera, and consequently to them as well.

- Bottom line: We will need to relearn some old behaviors, unlearn some more recent ones, and learn some completely new ones.

“How do I use a microphone?”

The answer to this question depends on what kind of microphone(s) you are using.

- **Lavalier:** This is the clip-on mike you see many speakers and broadcasters using. It works most effectively when the transmitter is clipped onto a belt or waistband and the microphone is clipped to a lapel or collar. This allows them to be placed to most effectively pick up sound and also gives the speaker mobility. However, if the microphone must be shared then moving it speaker to speaker will add delays and dead space to the meeting. They can be just held in your hand or laid on the lectern or table but depending on their sensitivity their range might be quite limited and if a speaker is too far away, they will become ineffective.
- **Handheld microphone:** This is a larger microphone that the speaker holds in one hand while speaking. They may be wireless or wired. If they are wired, then the speaker's mobility will be limited by the length of the cord. Also, since they must be held, they limit the use of the speaker's hands to gesture or hold objects. They can also require some practice to use effectively as there is usually an optimal distance from the speaker's mouth for them to be most effective.
- **Lectern microphone or stand microphone:** This is essentially a hand-help mike mounted on some kind of stand. Since all speakers need to do is walk up to it and perhaps adjust its height it can be easier and less intimidating than a lavalier or handheld. It also frees up the speaker's hands. However, it also effectively tethers the speaker to wherever it is located.
- **Conference microphone:** This is an omni-directional microphone that is intended to be placed in the center of a group and as such may have a longer range than those previously mentioned. They can be used on or near a lectern and may be easier for inexperienced speakers since they won't require any adjustments and may allow some movement within the speaking area depending on their sensitivity. However, if they are sensitive enough to allow the speaker to move away from them, then they are also sensitive to pick up distracting background noise.
- All microphones have an individual effective distance for picking up sound. For some it is very short. It is a good idea for speakers to allow time before a meeting to become familiar with what equipment is in use and how to use it. If you are in a location with a sophisticated sound system *and* you have a member who understands how to use it, then it might be possible adjust a microphone's gain (essentially it's level of sensitivity) for each individual speaker. However, this is not what most clubs will have access to, therefore the only adjustment that may be possible is the physical distance from the microphone and the volume on the listeners (remote participant's) end. Also, in most club settings using relatively inexpensive equipment, the microphone will only be transmitting sound to remote listener's, not the on-site audience. Not that microphones

can't wired into a speaker system, but doing so can introduce complications that your club may not have the experience to resolve (they can become very complicated A/V technical issues).

- Also, a word about meeting etiquette—if a microphone must be passed from speaker to speaker, such as using a lavalier, and you currently have possession of it—start preparing to hand it off while the next speaker is proceeding to the lectern and have it ready when they get there. If there are multiple microphones and one (or more) is being passed around (as in a group discussion for instance) then assign somebody to carry them around the room. Also, in the not-quite-over Covid age, members may be nervous about handling a mike right after somebody else, consider this during their set-up.

[“Do we need more than one microphone?”](#)

Maybe, if you have a large room and if there are occasions when participants will be speaking from someplace other than the lectern, then you likely will. One complaint that remote participants sometimes have is that they can't hear what is being said in the room by anybody other than the speaker at the lectern.

[Wired vs. wireless microphones](#)

You may not have a choice since you will likely have to use whatever is available. But if you do have a choice, perhaps you are purchasing your own equipment, then wireless offers greater range and flexibility. As previously mentioned, and discussed at length in the user's guide, all the microphones and speakers will likely need to be run off a single computer in order to prevent feedback. A meeting location may be big enough to provide enough distance by having them on more than one computer, but still too big for a microphone cable to reach all parts of the room (not to mention the possibility of creating a trip hazard by attempting to do so). This problem is largely eliminated by using wireless microphones and it is possible to support multiple mikes with a single receiver.

[How to best use available computer displays](#)

If there are multiple computers in use, and there probably will be, then there are also multiple options for what should be displayed on them.

- Remote participants. At a bare minimum, the remote participants should be projected such that all the in-person participants can see them. If you are using a large monitor in the room or projecting onto a screen, this is what should be on it. However, set this display to speaker view. There are two reasons for this:
 - To make sure remote participants are featured when they are speaking.
 - To make sure that any screen shares that are taking place can be seen by all participants.
- Keep in mind, this is purely the display. Camera set-up was discussed earlier, but ensuring that the speaker, remote or in-person, and their screen shares are featured in speaker view is most easily accomplished if the speaker camera and the speaker's

microphone are both attached to the hub computer – but the display computer can be separate.

- If the **timer** is a remote participant and an additional computer is available, this computer can be positioned so that it is visible to the speakers in the room and the timer “pinned.” This arrangement allows all participants, in-person and remote, to see the timer’s signals throughout the meeting. If the timer is in the meeting room, this becomes more difficult as they will need either a computer or a camera available to ensure that remote participants are able to see their timing device.
- Since the webhost will probably also be monitoring the chat function to assist remote participants during the meeting, it is probably best not to display the host computer if it can be avoided. Thus, using the suggestions just presented, a good arrangement would consist of three computers:
 - Host computer to run required equipment and allow webhost to monitor meeting participants, admit participants, and monitor and respond to meeting chat.
 - Remote display computer, or speaker computer—the computer that will be projected to show remote participants and the current speaker.
 - Timing display computer—the computer used to display the timer’s signals. NOTE: Depending on the room configuration it might be possible to use this computer both to display the timing and to support the camera showing the in-person participants to remote participants.

Meeting agendas

Since the Toastmaster of the Meeting, the Table Topics Master, and the General Evaluator will all need to know who is in the room and who is joining remotely, annotating who is joining remotely on the agenda, if possible, is very helpful. Actually doing this may depend on how the agenda is being generated.

Modifications to meeting roles and new roles

New Roles

Web Host (also sometimes referred to as a Zoom Host)

This is a critical role that functions in many ways like a virtual sergeant at arms.

Responsibilities include:

- Admitting participants from the meeting’s waiting room if one is used and inviting additional attendees to the meeting
- Creating and sending invitations for meeting participants to join breakout rooms when these are used
- Running on-line/in meeting polls
- Muting and unmuting participants when/as required

- Needs to be the virtual/computer host for the meeting, but does not necessarily need to have an account or schedule the meeting if host responsibilities can be transferred to them.
- Assigning Co-hosts when they are needed
- Renaming participants and computers.
 - For instance, some participants may be filling meeting roles and identifying them on screen is helpful to other participants. Using name tents to do the same thing for in-person participants is also a best practice.
 - Identifying the computer that the speaker's camera and microphones are attached to also helps participants. For example: Lectern, Speaker Cam, Speaker Mike, etc.
- Providing technical assistance to remote participants--how to use screen share, how to pin a participant's screen (such as the timer)
- Removing disruptive participants from the meeting
- Monitoring meeting chat if there is not a dedicated Chat Monitor
- In most cases, the Web Host will probably also be setting-up the meeting's equipment, but it is possible, and in some cases advisable, for that to be performed separately from the Web Host function. For example, the Sergeant at Arms or some other member might be familiar with setting up the equipment but are not available to host the online portion of the meeting. Or the equipment might belong to a member who sets it up but is not actually hosting the meeting.
- The Web Host probably should not have any additional responsibilities during the meeting, if possible.

Chat Monitor

If there are a large number of on-line participants, especially if the club is still learning how to conduct hybrid meetings, then it can be useful to have a dedicated chat monitor to make sure that questions, requested inputs, or issues that need to be brought to the attention of the on-site participants or presiding officer are not missed. The Web Host can perform this function but, in some cases, it may be advisable to separate them.

Technical/A-V Support

This person is responsible for overseeing equipment set-up—cameras, microphones, speakers, projectors, etc.—to make sure everything is connected and configured properly. They may also function as the Web Host or they may be a separate person. In some clubs the Sergeant-at-Arms might be able to perform this role but only if doing so does not interfere with their traditional meeting responsibilities.

Modifications to Traditional Meeting Roles

Conceptually, any meeting role can be filled by either an in-person or a remote participant. In practice, although most roles will not require modification to their fundamental responsibilities, adding a virtual element does have an impact, especially the Toastmaster and Timer roles.

Toastmaster

The Toastmaster of the meeting is impacted in a couple of different ways, largely depending on whether they are remote or in-person.

- In-person: The Toastmaster needs to be aware of who is in the meeting room, and who is on-line, and maintain an awareness of both in order for the meeting to flow smoothly and to switch back and forth between in-person and on-line participants.
- On-line: The Toastmaster must be working closely with the Web Host to make sure they can unmute when and as required throughout the meeting. Also, since the Toastmaster will be on-screen in this case, in-person meeting participants will need to direct their attention to the monitor and respond to the Toastmaster the same as they would if they were in the room together. To some extent, the Web Host can act as an assistant to the Toastmaster to help the meeting flow back and forth between on-line and in-person participants.

Timer

The Timer role can be significantly impacted due to challenges in ensuring that all participants can see the timing signals throughout the meeting.

- If the Timer is in the meeting room, then they will probably be using timing lights or cards for the in-person participants. However, on-line participants will only be able to see these if there is a camera pointed at them and this is one option. Another is for the timer to use a timing background on a computer which can be seen by on-line participants with a display that is oriented such that in-person speakers can also see it. And, of course, they can also use a physical device and a computer application simultaneously (which I have seen effectively and efficiently done).
- If the Timer is online, it is somewhat more difficult. Whatever method they use to signal time, it is going to be displayed on-line, thus, the only way it can be seen in the meeting room is by “pinning” the Timer to a display that can be seen in the meeting room by the speakers. As previously mentioned, orienting a dedicated laptop’s display such that it can be seen by the speakers will accomplish this.
- Have two Timers—one in the meeting room with physical timing signals for speakers in the meeting room, and on online for remote speakers. This is probably the easiest solution, but it does create an additional meeting role. One can be the primary timer who will time all speakers for purposes of the Timer’s report.

General Evaluator and Table Topics Master

The General Evaluator is impacted in much the same way as the Toastmaster—they must be aware of where meeting participants are located. The General Evaluator must be able to locate and call upon their team members for their respective reports, and the Table Topics Master must be aware that volunteers, and potential “voluntold” table topics participants are both in person and remote and should strive to include on-site and remote participants.

Evaluations and Reports

This is pretty simple for remote participants; they will just speak to their cameras at their locations. For on-site participants, however, especially for speech evaluators, they need to remember to look at and speak to the camera as well as at participants in the room. Clubs will need to be creative in modifying and adding roles to suit their specific situations.

Break-down/Packing Up

Breaking down after the meeting is critically important since breaking down from one meeting is the first step toward successfully setting up the next one.

- It is vitally important to make sure that equipment is properly stored—cables used with specific peripherals need to be packed with them.
- All cables and wires should be labeled with who they belong to and what they go with.
- As much as possible, or for as long as possible while it lasts, original packaging can be useful for keeping equipment, parts and cables/wires together.
- All equipment should, if possible, be stored in one portable container which is stored or transported by either designated Tech Support, the Sergeant at Arms, or if owned by a member—by that member. Use a checklist for both packing up equipment and for checking it before transport to the meeting, especially if it is used at more than one location.
- Make sure that batteries, remote controls and power strips, tripods and stands are also accounted for, listed, and available.



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