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TECHNOLOGY
SERVICES
FROM AARP

IMPLEMENTING HYBRID PROGRAMS

*Considerations and Best Practices
for Aging Network Organizations*



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Introduction

In recent years, it has been increasingly important to ensure that programs targeted to older adults are designed with flexibility in mind. Hybrid programs offer just the right amount of flexibility and allow organizations to adopt the hybrid model that works best for its programs and audiences. While many prefer the familiarity of the traditional, in-person experience, others appreciate the opportunity to engage from the comfort of their home.

The considerations and best practices included in this manual should guide the decision-making process for organizations serving older adults when considering implementing hybrid programs. These considerations and best practices are, in part, informed by Older Adults Technology Services (OATS) from AARP's experience transitioning its Senior Planet programs from virtual to hybrid models.



Types of Hybrid Programming

Hybrid can (and often does!) mean different things to different people. The many definitions of hybrid can make offering hybrid programming complicated: facilitators, participants and host organizations may each have a different understanding of what to expect from hybrid programming. This makes it important to clearly define and communicate the parameters of your organization's hybrid programs. In this section, we will give some examples of common interpretations of the hybrid model and explain why we prefer one model over others.

Hybrid Model: A/B Segmentation

When schools and other organizations first started reopening after the initial pandemic lockdowns, many adopted the A/B-day hybrid model to reduce the number of people coming together in person. This model divides participants into two cohorts that alternate their in-person and virtual attendance. For example, the A Group attends in person on Mondays and virtually on Wednesdays, while the B Group attends virtually on Mondays and in person on Wednesdays. The benefit of this model is that both groups experience the same amount of in-person and virtual content, which can be attractive to those participants who are interested in some in-person interaction and not having to travel to a center for every session. Generally, the instructor or facilitator is always in person.

However, this model risks giving participants inconsistent experiences from session to session. Having only one facilitator makes it significantly more difficult to equally engage both cohorts, often leading to passive rather than active engagement among virtual participants. Additionally, the changing schedule could be confusing for some participants.



Hybrid Model: In-Person Participants with One Virtual Instructor

In this model, an instructor connects virtually to a group of participants who have gathered together in person. Organizations may use this model for special events or classes that involve a guest presenter or instructor. In this case, it is often easier (and less costly) for a presenter to connect virtually rather than to travel. This model lends itself best to lecture-style presentations that conclude with structured question-and-answer sessions, asking participants to hold their questions until the end of the presentation. However, if the platform being used at the in-person location allows the virtual presenter to see and hear all in-person and virtual attendees, more interactive sessions may be possible.

Hybrid Model: In-Person and Virtual Participants and Two Instructors

OATS' preferred hybrid model maintains stable cohorts of virtual and in-person participants and includes two facilitators/instructors: one in person and one virtual. When participants commit to attend either virtually or in person, there is less confusion about which day is which. Everyone knows what kind of experience to expect. We recommend that the two facilitators or instructors work together to establish a co-teaching/co-presenting arrangement that works for them. This may mean that they alternate leading the instruction during a multi-session program, or they may share pre-determined presenting responsibilities throughout the session.

The presence of two facilitators or instructors for hybrid programs has numerous benefits. It makes it easier to ensure a balanced experience for both cohorts of participants. The facilitator who is not leading the session at any given moment can focus on looking for questions or signs of confusion from participants and let the lead instructor know of any issues, so that participant questions or comments do not go unnoticed. The additional instructor usually has more ability to notice those who have not participated and encourage their engagement. Finally, this model allows for individualized instruction for participants in each cohort. While the hybrid class experience should give plenty of opportunity for the two cohorts to learn and interact with each other, it is also helpful to plan time for each instructor to focus on their cohort. This ideally happens when participants are working on their own or in groups. The in-person facilitator can make the rounds with individuals in the room and address any questions on a one-to-one basis. Similarly, the virtual facilitator can answer questions from those attending online either as a group or individually by using breakout rooms. After the independent activity, the two cohorts can come back together and discuss the activity.

Considerations for Implementing Hybrid Programming

Why is your organization interested in hybrid programming? Is there a strong demand for hybrid programs? Who is asking for them? Participants? Partner organizations? Funders? Will hybrid programs always be available? Or will they only be implemented during COVID-19 surges? Or perhaps when the weather is too hot or too cold?

Before moving forward with hybrid programming, your organization should establish whether there is a demand among those you serve. Ask what aspects of the virtual experience participants have come to appreciate during the pandemic and what they like about in-person sessions. Use this information to create your organization's hybrid model. If hybrid programming is important to your organization, it may be necessary to sell the idea to your audience by highlighting some of the benefits.

When offering hybrid programs, it is important that there are enough participants willing to attend in person. If there is just a handful of participants attending an event in person, some may find it difficult to participate in the conversation when most attendees are participating virtually, or they may even resent that they participated in person instead of from home. Consider scheduling new hybrid programs around mealtimes so that those who are coming to eat with their peers have additional reasons to stay for programming. Special perks for in-person attendees could also include early access to programs, events or special raffles. How participants are incentivized will vary depending on the services and programs your organization offers. It is important to remember, however, that older adults may not feel comfortable participating in in-person events depending on their personal preferences and safety considerations.

When deciding the structure of your hybrid program, it is worthwhile to consider longer-term engagements along with one-off sessions. For example, in OATS' experience, programs that were offered over five and 10 weeks had higher attendance and were more successful than one-off programs. The prolonged experience gives time for all involved to become more comfortable with the format. Once people get to know each other and connect, they are more likely to keep coming.

The number of people who can be accommodated per session will depend on whether the program incorporates a hands-on component, which typically limits the number of people who attend. OATS recommends that events with a hands-on component be limited to 12 to 15 participants for both the virtual and in-person cohorts. There is a maximum number of participants that one facilitator/instructor can

meaningfully engage with during the program, though that number may depend on the type of class. Programs that do not have a hands-on, instructional component may not need to cap registration. For the in-person cohort, space would be the only limitation for programs that are strictly informational in scope.

Costs and Resources

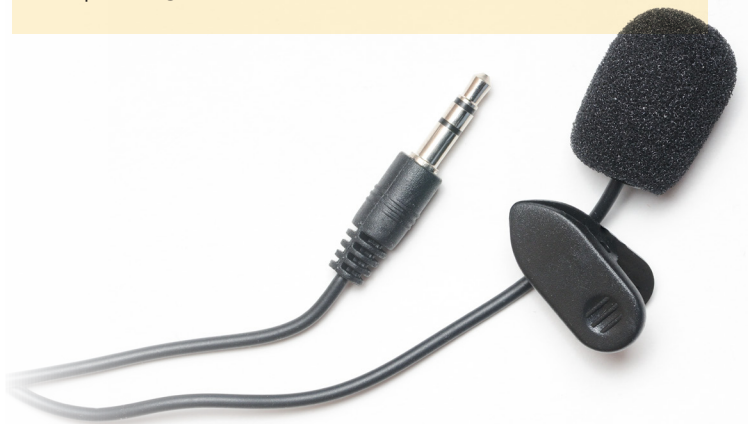
Below is a list of the minimum equipment recommendations:

- **Large-screen TV:** to project the virtual cohort and trainer to the in-person cohort and facilitator
- **Lavalier mic for in-person trainer:** so the virtual cohort can clearly hear instructions
- **External camera:** to allow virtual attendees to see the class as a "square" on their screens
 - It is helpful to set the external web camera on a basic tripod so that virtual participants have a better view of the room. In that case, you will also need a USB extension cable to connect the external camera to the computer.

Nice to Have:

If your organization has capacity and resources, the following items can be helpful!

- External speakers are nice to have to make sure that everyone in the room can hear virtual participants.
- Conference call speaker devices (e.g., polycoms) can help ensure that virtual participants can clearly hear all of the in-person participants.
- An all-in-one 360-degree speaker, mic and camera (like an Owl Labs webcam) can be a nice to have because the camera moves toward sound, making it easier for virtual participants to tell who is speaking.



The hybrid experience for both in-person and virtual attendees should be as similar as possible. To help ensure success, plan “dress rehearsals” to get a clear idea of what both sets of attendees see and hear, to troubleshoot any issues and to test your set-up using any accessibility features that will be used by participants.

Ensuring that the in-person and virtual experiences are as similar as possible becomes even more pronounced for programs that include a hands-on component or instruction. For these programs, the most appropriate model includes facilitators in both the virtual room and in the physical room. The types of programs that benefit most from this model vary, but at a minimum would include exercise classes, technology classes and art classes. Having a facilitator or volunteer in the room with the in-person attendees also helps troubleshoot and resolve any issues that may arise with the technology.

Materials can help create cohesion among in-person and virtual attendees. Any materials distributed to in-person participants should also be made available to the virtual participants in advance of the event. Here, there are a few options. For an ongoing, longer-engagement program, consider mailing materials ahead of time. This is especially true for items that cannot be delivered in a virtual format, like paints, canvases or other art-related media. Instructors in exercise classes should ensure that any equipment they use can be replicated with items commonly found in the home. For example, they may suggest that virtual participants use soup cans as weights. Brochures, handouts and similar items can be emailed ahead of the program, distributed through the videoconferencing’s chat feature or posted online where participants can be directed to access them. Keep in mind that, for the most part, virtual attendees will download files in advance, so it is advisable to review this process with participants.



Accessibility

It is important to note that Area Agencies on Aging and other organizations serving older adults are now serving growing numbers of younger people with disabilities. Offering hybrid programs that are accessible is of the utmost importance and will help ensure that this population is able to engage in your organization’s hybrid programming. An essential accessibility feature for participants who are deaf or hard of hearing is auto-transcription or closed captioning (CC). The CC feature that is available in many virtual platforms automatically transcribes audio. To minimize the transcription of background or side conversations, it may be necessary for each speaker to use a standalone microphone that is separate from the computer being used. The accuracy of auto-transcription services varies depending on the platform being used, the number of microphones in use and room acoustics.



Best Practices

- **Keep presenter duties fluid.** Ideally, both the virtual presenter and the in-person facilitator will be able to lead the session. The presenters should plan ahead of time to decide who will be responsible for what content. However, the ability for either presenter to jump in and take over is also extremely helpful. During OATS’ first hybrid pilot, an in-person participant arrived late and was having trouble logging onto the center’s Wi-Fi. The in-person trainer was able to seamlessly hand off the remainder of the lesson to the virtual trainer, while he helped to get the participant connected.
- **Leverage virtual features.** Think about ways to make the hybrid experience special. It might be fun to encourage virtual participants to use a virtual background. Have in-person attendees vote on their favorite! One trainer used a virtual background from the “Price is Right” and played the theme song at the start of the lesson. Participants across both cohorts were laughing and interacting with each other with greater ease than usual.
- **Screenshare.** If any portion of the lesson will be shown on a screen, it is essential that the screen be projected and shared for both the virtual and in-person attendees. The least successful sessions of the OATS pilot hybrid iPad program were those in which technical difficulties prevented the trainers from sharing their screens.

- **Mute when necessary.** All instructors and participants should be muted unless actively contributing to the lesson. When the instructors are troubleshooting or helping individuals, it is important that they mute themselves on the virtual platform. Virtual participants should unmute themselves to easily participate in class discussions and to ask questions.
- **Keep it fun.** As is often the case, people tend to learn best when they are having fun. It is especially important to keep a light and fun atmosphere when trying out a new model, like hybrid. In the pilot iPad class, to promote interaction between the cohorts, one of the in-person participants threw a ball to one of the virtual participants who pretended to catch it. These kinds of fun, creative elements can make the hybrid experience special and worthwhile for all involved.
- **Encourage interaction.** Like the importance of having fun, fostering interaction and connection among participants is a key to success no matter your program format. Be creative about how you can encourage participants to interact with one another both during and outside of their sessions. This may involve participants communicating outside of class through email or phone calls. If in-person participants have the tech skills, you could start a virtual discussion board that provides a platform for creating connections across the cohorts.

Additional Considerations

As much as possible, encourage virtual participants to turn their video cameras on. It is no fun to stare at a screen with a bunch of empty squares! It is also easier to gauge how the session is going when you can see everyone's body language and facial reactions. If virtual participants are reluctant, try sharing some best practices about looking your best on camera, what background colors compliment certain skin tones and good lighting!

Conclusion

Although hybrid programming is not a new concept, it is certainly being tested at a much higher rate than ever before. Over the coming months and years, hybrid programming is likely to become increasingly commonplace. While this program model requires additional planning and preparation on the part of the organization



Keep it light and fun, and if it is clear that some will not turn on their camera, make the best of the situation.

Another camera-related best practice, but for in-person attendees, is to make sure the facilitators and participants are facing the camera.

Tap into volunteers. Having two facilitators per session can be burdensome for scheduling and budgetary reasons. If you have a group of committed volunteers, explore their willingness and interest in assisting either virtually or in person.

Conduct multiple “tech checks.” So much of the success of hybrid programming relies on the technical aspects going smoothly. Before beginning a hybrid program, rehearse using the necessary technology, including accessibility features. Call virtual participants to make sure that they have Wi-Fi—enabled devices and a broadband connection that supports streaming live video.

and presenter/facilitator, it offers an incredible amount of flexibility and level of customization for the participants. Ultimately, the success of hybrid programming at a given organization will depend greatly on its willingness to adapt and to be responsive to feedback from facilitators and participants alike.

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Older Adults Technology Services (OATS) from AARP

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OATS helps older adults learn to use and leverage technology to transform their lives and their communities. Through its flagship program, **Senior Planet (seniorplanet.org)**, OATS works closely with older adults to create extraordinary experiences in-person and online. As one of AARP's charitable affiliates, the mission of OATS is "to harness the power of technology to change the way we age."

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