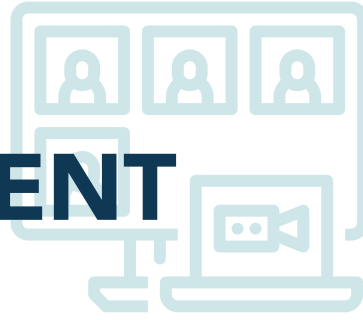


MINI-GUIDE FOR

VIRTUAL ENGAGEMENT



Technologies like video conferences and online surveys are great tools, but simply moving planned activities to an online platform are not going to be effective. Stakeholders participating in virtual engagement may include older adults, non-English speakers, immigrants, people living unsheltered, people of color, people with disabilities, low-income working people, and others who may not have reliable access to the internet. Virtual engagements may exacerbate challenges with reaching those who are already left out of traditional community engagement.

COVID-19 has offered us an opportunity to re-center equity in engagement and maintain our commitment to dismantling the systems that systemically disregard and oppress these stakeholders. The traditional principles of in-person community engagement still apply to virtual engagements. Review the [Mini-Guide for Planning Engagements](#) and [Mini-Guide for Facilitation](#).

5.1 PLANNING VIRTUAL ENGAGEMENT

Approach the planning process for a virtual engagement just as you would in-person community engagement activities. Identify your purpose and stakeholders, build your agenda, incorporate participatory decision-making (if applicable), and promote your engagement.

DETERMINING YOUR VIRTUAL PLATFORMS

Before you start planning, determine which virtual platform will be most successful based on your stakeholders' ability to navigate the technology.

TIP: Reach out to your stakeholders in advance with an easy, short survey to determine access and technology capabilities. Smartphone technology is often more prevalent than computers.

When choosing a platform, consider:

- Is the tool easy-to-use and intuitive? Does it require downloading an app, lengthy account creation, etc.?
- Are the formatting and functions compatible on a smartphone?
- Is the technology something that can be accessed by non-English speaking or low literacy community members?
- Is the technology something that communities can use repeatedly (e.g. Is it free, low-cost, and accessible)?
- Can you record meetings to be sent at a later date?

IN THIS SECTION

[5.1 Planning Virtual Engagement](#)

[5.2 Strategies to Ensure Stakeholders are Prepared to Engage Online](#)

[5.3 Facilitating Virtual Engagement](#)

[5.4 Creative Virtual Collaboration](#)

[5.5 Checklist for Virtual Engagement](#)

5

PUBLIC OR PRIVATE?

Will this be an open forum anyone can join or will you need to target specific members of the community? Be aware that forums open to the public and anonymous sessions present a risk of "Zoom-bombing," a method of internet 'trolling' that seeks to interrupt a session by screen sharing explicit images or other inappropriate or offensive content. Features on video platforms can help prevent this by setting screen share to "host only" and using the waiting room feature.



The following virtual platforms include their own pros and cons, and it is important to understand the features that fit your purpose and community.

ZOOM	CISCO WEBEX	MICROSOFT TEAMS	GOOGLE MEETUPS
<p>PROS</p> <ul style="list-style-type: none"> • Recurring meetings • Raise hand feature • Q&A and polling feature • Easily recordable • Breakout rooms feature • Closed-captioning feature • Multiple presenter setting • Toll-free dial-in numbers • Webinar capacity • Mute & unmute capabilities • On-screen whiteboard feature 	<p>PROS</p> <ul style="list-style-type: none"> • Polling feature • Raise hand feature • Same link for future meetings • Easily recordable • Ability to take attendance • Polling • Noise detection and suppression feature • Webinar feature 	<p>PROS</p> <ul style="list-style-type: none"> • Screen sharing • See video and chat comments simultaneously • Save chat comments automatically • Background blur feature • Integration with Microsoft Office • Video chat with up to 250 people or present live to 10,000 • Share meeting agenda 	<p>PROS</p> <ul style="list-style-type: none"> • Free video calls for up to 10 people • Screen sharing • Recurring meetings • Easily recordable • See video and chat comments simultaneously • Message contacts anytime, even if they are offline
<p>CONS</p> <ul style="list-style-type: none"> • Free account is limited (no breakout rooms, 40-minute sessions for 3-100 people, etc.) • Free accounts are not encrypted • Must set controls to avoid “Zoom-bombing” 	<p>CONS</p> <ul style="list-style-type: none"> • Difficult for moderator to share screen and monitor chat comments simultaneously • Must save chat comments manually • No toll-free dial-in numbers 	<p>CONS</p> <ul style="list-style-type: none"> • May not be able to record video meetings • No in-meeting poll feature • More focused on business function than video/community needs 	<p>CONS</p> <ul style="list-style-type: none"> • No breakout rooms • No in-meeting poll feature • More focused on business function than video/community needs

All of these platforms (and others) provide unique and robust capabilities, but none of them do everything. Some platforms are stronger in hosting breakout groups, and others are better for polling and voting. Keep in mind that it could be beneficial to combine different platforms for different engagements.

CONFERRING PLATFORMS

[Hopin](#) is a web-based application that promotes knowledge-sharing across stakeholders. The capacity for Hopin is as small as 50 and as large as 50,000. It features recording capabilities, breakout rooms, screen sharing, Q&A, and a data analysis tool for comprehensive data tracking. For more on how to use virtual conferencing, visit the [Catalog of Ideas for Virtual Engagements](#).

VIDEO ONLY PLATFORMS

Some of the video broadcasting capabilities you will find on digital platforms are:

- [Twitch](#)
- [Facebook Live](#)
- [Instagram Live](#)
- [YouTube Live \(through Zoom\)](#)

These platforms allow chat discussions while videos are streaming and can be a great channel for sharing information and addressing questions and concerns.

OPPORTUNITIES AND LIMITATIONS FOR VIRTUAL ENGAGEMENTS

OPPORTUNITIES	LIMITATIONS
<ul style="list-style-type: none">• Supporting the full spectrum. Digital engagement tools, including virtual engagements, can support community engagement at all levels of the engagement spectrum; from outreach through consultation, collaboration, leadership, and even empowerment.• High accessibility. Virtual engagement provides an accessible option for involving stakeholders in important conversations, like working parents, younger people, mobility-impaired people, and shift workers. A virtual setting allows them to participate by not needing to travel to an engagement.• Anonymity. The relative freedom of an anonymous online environment removes the barriers of aggression, loudness, and power that may be present at in-person community meetings and often stifle debate.• Cost effective. Online engagement platforms are cost effective and efficient. You can contact more potential stakeholders directly at less cost.• Supports culture shifts. Online engagement can also shift an organization's culture by improving transparency and responsiveness.• Builds connections. When you meet someone face-to-face, you feel like you know them better because you can put a face to their voice. Video conferencing allows for the same sense of connection, even at a distance.• Recording capabilities. Software can record digital meetings and conferences so that these chats and discussions can be watched back later or seen by those who could not attend.	<ul style="list-style-type: none">• Lack of personal contact and relationship-building, especially when not everyone turns on their video. While we <i>interact</i> through an online meeting, it's challenging to understand a person deeply. Communication may be one-directional or bi-directional, limiting the capacity to promote sustained relationships with stakeholders.• Trust and transparency. It can be hard to build trust and transparency over virtual settings, especially with data breaches, hacking, and other security issues associated with the technology.• Learning curve. Stakeholders have had to get used to video conferencing. Some have fallen in love with it from day one just because it was shiny and new. Others have hated it from the start.• Talking over each other. Audio lags can lead to people talking over one another and interrupting the flow of the meeting.• Difficult to manage distractions. Virtual spaces present distractions such as working while parenting/ care-taking. You have less control over your engagement environment.• Gender-based communication gap. There is a gender communication gap which is exacerbated in virtual meetings. The tendency for men to take more (virtual) space by speaking louder and more frequently than women gives unequal time for contributions. The common dominance of white and/or male opinions during meetings creates harmful power dynamics not only for women but serves to exclude the participation of people of color, limited-English communities, youth, and other marginalized groups.

INCORPORATING ARTS AND CULTURE INTO YOUR VIRTUAL ENGAGEMENT

Arts and culture translate very well into the virtual space. It is an excellent way to support stakeholder dialogue and comfort engaging with others with whom they may share **similar cultural practices and interests**.

- **Hold a virtual dance party.** Creative expression, such as art-making, dancing, or acting, can offer stakeholders a unique way to share thoughts or feelings about an issue.
- **Build a community tree using technology for collaging.** Collaboratively, starting from the roots and working your way up to the leaves, have each piece of the tree represent a theme that participants contribute to. After constructing the tree, host a viewing exhibition to allow stakeholders to find commonalities. Community trees can be designed virtually utilizing an online whiteboard tool such as [MURAL](#).

For more information on art and culture, review the [Mini-Guide for Planning Engagements](#).



BEST PRACTICES FOR BUILDING YOUR VIRTUAL ENGAGEMENT AGENDA

- **Lecture less, engage more.** Presenting information in varied ways will help keep your stakeholders engaged. Most platforms have chat features, polls, timers, and screen sharing features. A common practice is to give a poll question on a topic you'd like to consider, show the results, and then talk about what was said. Another strategy is to take live notes that stakeholders can see on a digital notepad. This increases the opportunity for interactivity, like a flip chart at an in-person training.
- **Plan time for stakeholders to engage with the platform.** Build in time at the beginning of the session for stakeholders to familiarize themselves with the functionality of the platform.
- **Incorporate a warm-up activity.** Just because people are online does not mean they do not need an activity to set the tone or get to know each other. Think about ways to incorporate arts and culture into activities to help set the tone. (See the [Part IV - Catalog of Ideas for Virtual Engagements](#) for examples.)
- **Break large documents into bite-sized pieces that can easily be delivered online.** Try using infographics, photos, and/or videos to convey relevant information and encourage online sharing across stakeholders.
- **Use breakout sessions.** This gives stakeholders the opportunity to share ideas and network with those around them, in smaller, more manageable group sizes.
- **Be mindful of attention spans.** Be prepared to adapt your agenda in the moment, if necessary, to help recenter the group. With more distractions to contend with, virtual engagements can be more difficult than those in-person when it comes to maintaining attention and focus.
- **Plan how people arrive.** Determine if a waiting room could be beneficial if people arrive with their videos/microphones turned on. For larger groups, starting with mics off is advisable.



PLANNING FOR AN INCLUSIVE VIRTUAL ENGAGEMENT

- Ensure a phone option is available--as an alternative to accessing the internet or for technical challenges. Read written comments out loud to give callers an opportunity to participate. Stakeholders who join by phone will likely not have access to video interpretation services.
- Make a recorded presentation available for stakeholders to view when convenient. If you are recording an engagement, be sure to inform all stakeholders it will be recorded and how it will be distributed, in order to build trust.
- Make notes from a meeting available.
- Provide translation services for any meeting transcripts.
- Provide ASL and subtitles/closed-captioning options for people who are Deaf/Hard of Hearing. Check out tools like [Otter](#).
- Provide image descriptions for people who are blind or use screen readers. (Screen readers cannot interpret images and must rely on text to read out loud the information on the page.)
- Ask participants to submit questions or responses before an engagement (via email or a simple form), instead of assuming their comfort level with features like Zoom's Q&A function.



DON'T FORGET TO HAVE SOMEONE PROVIDE SOUND AND TECH SUPPORT

Even with the best-laid plans and practices, technology issues will arise. Someone may not put themselves on mute or will forget to take themselves off. Links may not work. The sound will get wonky. You need to be able to focus on facilitating the engagement, so have a tech-savvy team member join as a 'tech facilitator.' They can help review the chat or be available for anyone who dialed-in over the phone.

INCORPORATING PARTICIPATORY DECISION-MAKING INTO YOUR VIRTUAL ENGAGEMENT

Interactive activities are useful for facilitating participatory decision-making. They provide structure, transparency, and opportunities for people to share their perspectives.

Strategies for Online Voting

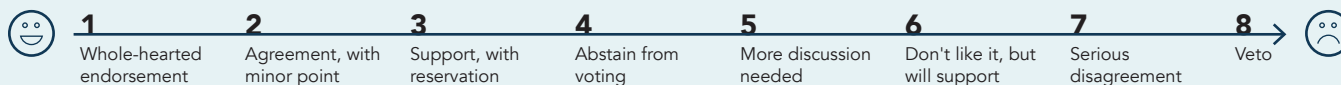
- **Poll** (in Zoom): Set up your poll before or during the event. It is anonymous, and you can keep the results private.
- **Chat Function** (in Zoom or other video platform): Think of this as the same as if it were paper. Ask people to submit their vote privately (by sending it only to the host) or to the whole group.
- **Doodle**: In just a few minutes you can create a poll, and share it with stakeholders. You can easily view the results of your free online voting.



TIP: A simple way to take Dot Voting online would be to use a combination of platforms. Zoom can be used to conduct your online meeting, but, for voting, use a Google document. Create a table with two columns (one for the ideas and one for people to place their 'dots' or votes.) To make it fun, you can use emojis instead. To learn more about Dot Voting, check out [this resource](#) from Nielson Norman Group.

GRADIENT OF AGREEMENT

Polling is an activity that focuses on making a final decision about how to move forward. By creating a scale of agreement or disagreement, stakeholders can share their full perspective, and options can be discussed before a final decision is made. This is a powerful way to ensure that everyone's voice is heard and incorporated. One way to do this in a virtual setting is to have participants enter the number where they fall on the gradient in the chat box, and request participants share their rationale aloud.



5.2 STRATEGIES TO ENSURE STAKEHOLDERS ARE PREPARED TO ENGAGE VIRTUALLY

Not all stakeholders will be familiar or comfortable with the chosen platform.

- Ask everyone to download technology in advance. Ask stakeholders to test the technology and download any necessary software before the engagement starts.
- Ask stakeholders to reach out if they anticipate any technical or participation challenges so that, even if you cannot solve them, you will be prepared to structure the agenda and activities in ways that will still engage them as much as possible.
- Reach out to those you think might struggle. If you anticipate certain individuals may struggle with connecting or participating remotely, do not wait for them to reach out to you, reach out to them with a personal note. Try a friendly email offering to assist them with any technology issues because you value their contribution and want to ensure they can fully engage and connect.
- Over-communicate the technology details. Do not send just one email and assume everyone will read it. We can promise you, everyone will not. Include notes about technology in all of your pre-workshop communications, and send follow-ups as needed.
- Open the workshop platform early to help people test and troubleshoot. Let stakeholders know you will be on the platform 20-30 minutes before the workshop and can help troubleshoot connection issues. Then you do not have to waste precious time fixing glitches once everyone is online.

PROMOTING BELONGING IN VIRTUAL ENGAGEMENTS

As in any community engagement, virtual settings are no place for language, perspectives, or activities that perpetuate systemic oppression, promote barriers to particular community demographics, or alienate specific cultural groups. Stakeholders should feel safe to share their stories and experiences. Design and lead with ground rules that communicate and amplify this message across stakeholders.

For more on this subject, review the [Mini-Guide for Anti-Oppression, Inclusion, and Accessibility](#).

5.3 FACILITATING VIRTUAL ENGAGEMENT

Leading virtual engagements comes with many different types of technical difficulties. Before going live:

Prepare your team.

- Designate the roles and responsibilities of team members. Try to assign one role per person; it is difficult to multi-task in a virtual setting. (e.g. Getting someone else to read and respond to comments helps to ensure the facilitators are staying on track.)
- Adopt a team strategy for collecting notes throughout the engagement.
- Plan to have a “back channel” during the meeting. This discussion method allows your team communicate during the session.

Test run your virtual platform.

- Preview your webcam. Adjust your indoor lighting and camera angle to properly light your face, and be mindful of your background. Anything you would not want your colleagues to see should be out of the frame.
- Test your microphone. Confirm with colleagues that your sound quality is sufficient. Wear a headset with a built-in microphone or use an external microphone, when you can.
- Visit [SPEEDTEST](#) to check your internet speed. If your speed is below 20 megabits per second, it is likely your video will look pixelated and have audio delays.
- Test all features of the platform: your screenshare, videos, and music. Make sure your 'back-channel' discussion plan is ready to go.

Have a backup plan if technology fails.

- If possible, set up a backup hotspot in case the WiFi is not reliable.
- Have more than one host. This ensures the engagement does not end for the whole group if the host's connection is interrupted.
- Have a backup conference call line.
- Plan back-up activities. Stakeholders may struggle with an activity that requires opening another platform or more tech literacy, have a back-up plan for lower-tech activities.

STAKEHOLDER ANONYMITY

Virtual engagements allow for a certain level of anonymity that can remove barriers, break down power relations, and free up individual expression. In situations where stakeholders may feel vulnerable in an engagement setting, being able to choose how they are identified and keep their cameras off.

- Removes the possibility of bias due to sex, ethnicity, and age.
- Allows an individual to express an opinion without the fear of intimidation. It greatly reduces the ability of anyone to bully or humiliate others, particularly in an online discussion forum.



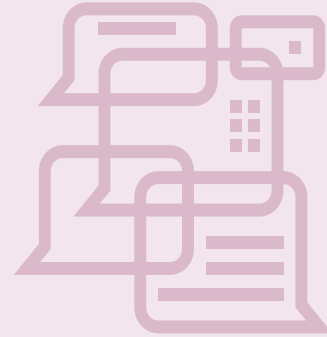
GO-TO BRAINSTORMING TECHNIQUES FOR VIRTUAL ENGAGEMENT

There are lots of techniques for brainstorming, either in-person or virtually. Try the various alternatives, and find those that work best for you and your team. For more details on these and other virtual brainstorming techniques, check out this [resource](#) from MIRO.

- **Mind Maps** — Set up your main question or issue at the center of an online whiteboard (or other shared document). Invite your team to build out from it with their ideas or thoughts. Link related points to create a map of information, opportunities, and issues.
- **Rapid Ideation** — A bit of time pressure is sometimes the recipe for creativity. Give your stakeholders a limited timescale to come up with as many ideas as possible.
- **Round Robin** — The round robin technique starts by inviting one stakeholder to share an idea. Then go around the group, and have each person share an idea that builds off of the previous ones. Think of it as real-time improvisation — you say “yes, and” to an idea to build upon it as a group.

BEST PRACTICES FOR FACILITATING VIRTUAL ENGAGEMENT

- **You don't have to be involved in the discussion.** Make it clear this is a space for community-generated dialogue and that your team is listening.
- **Do not just be clear, be impossible to misunderstand.** As the speaker in a remote meeting, it's harder to know if your message was heard clearly and understood other than by confirming that you've been clear.
- **Acknowledge participant contributions.** Acknowledging what individuals are saying helps to keep the dialogue moving forward.
- **Body language still matters.** Be conscious to make eye contact and exude the tone of the engagement through your body language. **TIP:** If you are distracted by your own video, turn it off on your computer, but still remember to speak directly to your stakeholders.
- **Facilitation and group dynamics are still a challenge online.** It is still a reality that even though online engagements can broaden participation rates, disparities can be exacerbated through virtual settings, such as the digital divide.



5.4 BEST PRACTICES FOR CREATIVE VIRTUAL COLLABORATION

Brainstorming sessions are excellent for generating innovative solutions and approaches. While traditionally held in-person, there is no reason you can not run an engaging session for your remote stakeholders. It is worth the effort, and the following tips will help you on your way:

Plan your platform ahead of time. For virtual brainstorms, you want to allow extra planning time to find the right combination of platforms. You want to replicate the experience of a physical brainstorm session as closely as possible. Make sure to have a video conference solution and online collaboration tool/whiteboard in combination.

Provide a warm-up activity to allow participants to get comfortable with the platform.

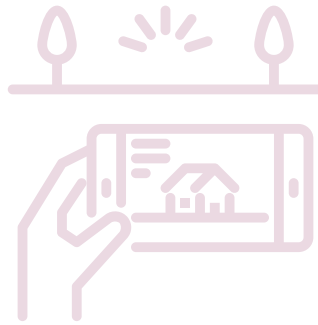
- Take time to walk your stakeholders through all the functionality of the collaborative platform.
- Use an icebreaker as a way to get comfortable with the platform (e.g. ask each stakeholder to add some fun facts about themselves.). In the instructions for the activity, explain how to contribute to the brainstorming board. That way, they will be ready to go when the brainstorming starts in earnest.

A few digital collaboration platforms:

[Zoom Whiteboard](#) is a function that allows synchronous visual interactions. This function is great for instructors who use chalkboards or whiteboards for group brainstorming.

[MURAL](#) and [MIRO](#) provide digital workspaces for group brainstorming and collaborative creation through the use of templates or blank whiteboard spaces. Within each board, you can add sticky notes, text boxes, images, shapes, connectors, as well as link to outside URLs or files. Additionally, the platform supports timed brainstorming and voting.

[Padlet](#) is an intuitive platform for creating collaborative virtual bulletin boards. You can add links, text, and images to a clean and orderly interface with a selection of colorful and themed backgrounds. You can choose from different Padlet designs, including grids, free-form canvases, timelines, or maps, to meet the needs of your engagement.



CATALOG OF IDEAS

Need a starting point for your virtual engagement? [The Catalog of Ideas for Virtual Engagements](#) has outreach methods for individuals and groups in an online setting!

5.5 CHECKLIST FOR VIRTUAL ENGAGEMENT

Planning virtual engagement

- Have we considered the digital preferences of our stakeholders?
- Have we determined the most appropriate platform for this engagement?
- Are we prepared to lead with accessibility and inclusion in mind?

Strategies for to ensure stakeholders are prepared to engage online

- Are we reaching out in advance to stakeholders who require additional support?
- Do we have a backup plan in the event of technical difficulties?
- Will we open the engagement early for additional troubleshooting?

Facilitating virtual engagement

- How are we honoring the emotions and trauma in the room as we emerge the pandemic?
- Have we done a test run of the virtual platform we are using?
- Have we assigned all the necessary roles among our team members?
- Have we set up a 'back channel' to communicate with our team during the engagement?

Leveraging creative virtual collaboration

- Have we incorporated digital tools that support collaborative brainstorming virtually?

SOURCES

Bang the Table. [Know your Community? 100 ideas to help engage your community online.](#)

Miro. [The Guide to Mastering Online Brainstorming.](#)

The New York Times. [The Do's and Dont's of Online Video Meetings.](#)

Society for Cultural Anthropology. [Visual Collaboration and Brainstorming Tools for Student Teams.](#)

Time Doctor Blog. [Tips to Run Engaging Virtual Brainstorming Sessions with Remote Teams.](#)



2021 | Version 2.0

TYTHEdesign provides social impact strategies that help build the capacity of government, nonprofits, and foundations to foster healthy communities and resilient cities.

Our problem-solving approach draws on human-centered design: we provide insights and services that strengthen our partners in the social sector to be equitable, responsive, and innovative. With over 10 years of experience, we have led engagements and projects that intersect with community development, library innovation, education, workforce development, affordable housing, re-entry planning, arts and culture, and more.

No matter the project, the needs of direct stakeholders are at the core of our process: we ensure that many voices and perspectives are represented in civic dialogue, depicted in social services, and are included in decision-making that impacts them most.

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