

MINI-GUIDE FOR

PHONE/SMS ENGAGEMENT



Engagements over the phone, via SMS/text messaging, or through other digital means present their own set of opportunities and challenges. Whereas phone-based engagement predates COVID-19, the pandemic presented challenges that suggest phone/SMS engagement could, in fact, produce a safe and thorough workaround to traditional, in-person engagement. In some instances, phone-based engagement can actually help expand your reach, rather than meeting with only a select group of participants in-person at a centralized location.

While not conducted face-to-face, the traditional principles of in-person engagement still apply to your phone/SMS engagement. To review these principles, see the [Mini-Guide for Planning Engagements](#) and the [Mini-Guide for Facilitation](#).

6.1 PLANNING PHONE ENGAGEMENT

Regardless of whether you are planning to engage with one stakeholder over a phone call or with a group through a facilitated conference call:

- **Schedule the call during appropriate times.** Survey stakeholders to see what time works for everyone. If some stakeholders are left out of the discussion, provide them with a follow-up opportunity to engage with you at another time.
- **Identify the method for note-taking.** It is critical to take notes during a group call and to indicate to the participants that notes will be recorded for synthesis and analysis purposes. Notes should never be shared beyond the individuals directly involved in the specific engagement. It's not necessary to take traditional notes during a call because the facilitator can employ a digital-based recording application.
- **Draft the agenda.** Phone-based engagement should still follow an agenda. You may witness that time management can be trickier in a phone setting (especially without the opportunity for direct eye contact with stakeholders), so ensure you design an agenda that is flexible to account for factors such as technical difficulties or conversations that may be sidetracked.
- **Set roles and responsibilities to fit the context.** If you have the capacity to hire an interpreter to support stakeholders who may have verbal or audio disabilities to amplify your participation rate, you should absolutely strive for that. Other roles, such as a co-facilitator, may be developed as appropriate for the context you are working in.
- **Test your equipment.** If calling from something other than a phone, such as a computer, test the equipment beforehand to verify that it is working as expected. Technical difficulties during the call can throw off the rhythm of the conversation and ultimately wastes everyone's time.

IN THIS SECTION

- 6.1 [Planning Phone Engagement](#)
- 6.2 [Facilitating Phone Engagement](#)
- 6.3 [Best Practices for SMS/Text Message Engagement](#)
- 6.4 [Checklist for Phone / SMS Engagements](#)



PLANNING TIPS

Planning a conference call is similar to planning a round table meeting. Remember each person speaks one at a time, therefore, discussions may take longer. The ideal number of people is between 8-10, but if you have a larger group, remember to reduce the number of discussion topics or activities to allow all stakeholders to participate.

If participants need to use speakerphone, ensure they move as close to the microphone as possible, so they are clearly audible.



CATALOG OF IDEAS

For specific outreach methods, check out the [Catalog of Ideas for Phone / SMS Engagements!](#)



Promoting access during phone engagements

- Understand the power dynamics and the role that you play as the facilitator in phone engagement. By understanding your positionality, you can better prepare for an honest dialogue.
- Be comfortable with uncomfortable conversations that may come up during the call, in which you may need to adapt the agenda in real time. Maintain focus and patience, as these conversations can help surface equitable, solution-oriented insights.
- Be prepared, and maintain patience for stakeholders that are Hard-of-Hearing, or have background noise. It is important to remember that stakeholders are navigating multiple responsibilities in order to attend a phone engagement.

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

OPPORTUNITIES AND LIMITATIONS FOR PHONE/SMS ENGAGEMENT

OPPORTUNITIES	LIMITATIONS
<ul style="list-style-type: none"> • Reach. During this time where some still feel safer at home than outside, phone/SMS engagement is an incredible platform for maximizing your reach. Especially with SMS, people can share insights and stories quickly. • Ease. Phone & SMS are easier to use than computer applications since they take advantage of a technology that is familiar to all of us. • Cost. Audio/phone conferencing is much cheaper than other means of virtual conferencing. • Accessibility. Phone and SMS are great platforms to meet different accessibility needs. For example, there is no need for broadband access for phone/SMS, so stakeholders who are Deaf/Hard-of-Hearing can engage without additional support. • Meet stakeholders where they are. Phone/SMS engagement gives them the option to identify the means of communication that works best for them. Research indicates that young people prefer to communicate through SMS, while seniors are more likely to opt for a phone call, either through a landline or cell phone. 	<ul style="list-style-type: none"> • Navigating the text divide. Just because most of your stakeholders own a cell phone does not mean they can afford unlimited talk and text plans. • Noise. This can affect the conversation and may even cut the facilitator out. • Impersonal settings. This communication medium does not support visual images, so this kind of setting may be impersonal since you cannot understand the body language and cues of the people on the call. • Interruptions. Talking on cell phones can create static or other noise as the user moves in and out of dead zones. Some take advantage of teleconferences to stay at home that day, leading to crying babies, barking dogs, or people at the door disrupting the call. • Dominating voices. There is also difficulty in determining stakeholder speaking order; frequently one person may monopolize the meeting.

INCORPORATING ARTS AND CULTURE INTO YOUR PHONE/SMS ENGAGEMENT

COVID-19 allowed many organizations, clubs, and associations to pivot their communications to the phone, in order to sustain relationships and stay on track with obligations and community events:

- *Invite local artists* (such as poets or storytellers) to kick off a phone engagement to support stakeholders comfort level, creativity, and inspiration.
- Facilitate an *SMS focus group that invites stakeholders to share photos or audio recordings of their own art practices* or arts and culture seen across the community, as a way to break the ice before a dialogue.

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

6.2 FACILITATING PHONE ENGAGEMENT

As you prepare to facilitate a phone engagement, either with a single stakeholder or with a group:

- **Be conscious of your tone.** Vocal cues are strongly interpreted by your stakeholders, so speak clearly and slowly. Build in pauses after you ask a question, so stakeholders can silently reflect for several seconds before responding.
- **Support stakeholders through active listening.** As there is no eye-contact in this setting, this requires the facilitator to utilize active listening skills to hear how stakeholders are receiving and responding to your dialogue. If you hear that some stakeholders are not speaking enough on the call, find appropriate ways to help include them. Most importantly, be aware of your 'air time,' the time you spend talking, as you facilitate.
- **Keep your agenda flexible.** Depending on how the conversation is going, you may realize that the dialogue is going off-course from the planned agenda. Remain flexible, and honor where the discussion goes.
- **Set up an option to record the meeting.** Especially if there isn't a note-taker, you can obtain consent with the stakeholders to record the call. This should only be utilized during appropriate moments and always be announced.
- **'Round-robin' speaking can be used on conference calls.** The facilitator calls on each stakeholder in turn and asks for comments. Use the participant list, and call on each person in the same order each time there is a discussion. This avoids one person being cut off before they are finished or more than one person trying to speak at once.
- **Solicit opportunities for feedback.** Although you are on the phone, provide an opportunity for stakeholders to give feedback or comments on the discussion. If they have the opportunity to use their devices simultaneously, ask stakeholders to send comments to you during the call. That can be a great way to collect feedback. It is also important to gather feedback after the engagement through a brief online survey or form or via email.
- **End on time.** No matter whether or not you started on time or accomplished everything set on the agenda, it is important to respect stakeholders' time, and end when you initially communicated you would.
- **Always follow-up.** By providing the transcribed notes that your note-taker records or sending the recording of the call, you can send this as a follow-up to stakeholders for future reference or next steps.

ESTABLISH GROUND RULES FOR CONFERENCE CALLS

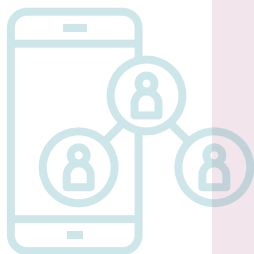
Here are some of the most common ground rules to support the facilitated conversation:

- Always identify yourself.
- Wait for one stakeholder to finish before speaking; otherwise, comments will be muddled or cut off on speaker phones.
- Stay on the call from start to finish. If you cannot stay on the call, let stakeholders know at the start of the call.
- Be fully present. Have someone else handle business while you are on the call.



TIPS FOR KEEPING TRACK OF PARTICIPATION

Start by making a list of everyone on the call. Each time someone speaks, track it on the list. This can help you identify who may be speaking too much or too little.



REACHING PEOPLE OVER SMS

90% of people read text messages within the first three minutes of receiving them. In contrast, only 24% of emails are opened in the first hour of being received, and a high percentage of emails are never opened at all.

- Conduct community input surveys solicited through SMS, allowing you to ask single questions of targeted respondents.
- Post information regarding upcoming community events, meetings, and programs, (e.g. NYC launched a citywide [COVID-19 text announcement system](#)).
- Combine SMS engagement with other in-person methods, such as for a polling activity conducted in real-time while facilitating community engagement in-person.

6.3 BEST PRACTICES FOR SMS / TEXT MESSAGE ENGAGEMENT

SMS or text messaging outreach is a great strategy for disseminating pertinent information, sharing involvement opportunities, and for staying connected to a large, targeted group. As you approach SMS engagement:



- **Identify a reliable SMS platform.** Depending on how you are conducting the outreach, different applications may be appropriate for your communications. Platforms like [WhatsApp](#) are very effective for small and large group outreach.
- **Configure your communications to be accessible.** As SMS is powerful in reaching a widespread audience, you may be reaching participants who speak a variety of languages and dialects. Luckily, many SMS-based platforms allow for multilingual access.
- **Follow up.** Give respondents instructions on how they can follow-up, comment, or get in touch with you and your team directly.
- **Choose an appropriate time to reach out.** As with phone calls, consider the schedules of participants, and avoid assumption-making on their capacity to immediately follow-up.
- **Consider any potential SMS divide.** Not all stakeholders will have a smartphone, so not everyone will be able to effectively engage if web links or videos are a component of your engagement.
- **Be mindful of flooding a recipient's SMS inbox.** Make sure you get your points across in as few words as possible. If stakeholders are faced with costs, be prepared to reimburse.
- **SMS is just one option.** Depending on your intentions, some may be uncomfortable having their phone number on a community listserv or shared with other stakeholders. Others simply may not be savvy with SMS. Before moving forward with SMS, check to see if that is the most appropriate platform.

6.4 CHECKLIST FOR PHONE/SMS ENGAGEMENT

Planning phone engagement

- Have we drafted a flexible agenda, in anticipation that the conversation may go off-course? Have we built in opportunities for feedback from the stakeholders?
- Have we tested our equipment?

Facilitating phone engagement

- Have we built a plan that allows each stakeholder to speak, in order to avoid any one participant from monopolizing the conversation?
- Have we set up an option to record the phone conversation with the consent of the stakeholders?
- Have we prepared an opportunity for follow-up and next steps?

SMS/Text message outreach and engagement

- Have we considered if this is the best approach and any potential barriers?
- Have we provided a means for stakeholders to follow-up on their own time?

SOURCES

Connected Learning Alliance. [What Does Digital Civic Engagement Mean in the Era of COVID-19?](#)

Luma Health. [5 Ways Providers Can Use SMS Text Messaging to Communicate with Patients during the Coronavirus \(COVID-19\) outbreak.](#)

Safe Route Partnership. [Equitable Community Engagement in the Time of Social Distancing.](#)



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.

TYTHEdesign is a certified Women-Owned Business Enterprise (WBE) based in New York City.

See more at tythe-design.com | Keep in Touch: info@tythe-design.com

TYTHE
design