TOOLE DESIGN

Tips on replacing a stakeholder or public meeting with an online forum

1) **Stay calm and be confident.** You've been thrown a real curve ball, but this is also an opportunity to demonstrate creativity and flexibility. You may need to scrap plans you've been working on for weeks and quickly develop a whole new game plan. **Help clients figure out how to keep the project moving forward**. Use the tips below, work with your [project team] to strategize possible solutions.

2) **Start with a conversation with your client:**
    a. Explore postponing public engagement. Can the project proceed without public/stakeholder engagement happening at this time? (Note: Whenever possible, we want to avoid postponing or delaying entire projects. Finding creative ways to proceed will provide continuity for clients, the communities we serve, and for [the company])
    b. Acknowledge that the diversity of participation will drop off when using online-only methods. Older adults, households or areas without reliable internet service, and immigrant/non-English speaking participants may be among the groups less likely to participate. Discuss this with the client, who will ultimately need to decide whether and how to proceed. It may be advisable to proceed now with online engagement and also plan for additional, in-person outreach to underrepresented groups at a later date.

3) **Use Zoom to host an "Online Open House" for group meetings**
A typical paid account with Zoom allows:
    a. Unlimited meeting time (no 45-minute cap)
    b. Up to 300 participants
    c. Screensharing, recording, video conferencing
    d. High audio quality through phone or computer audio
    e. Super easy installer for non-account holders. They really have made it very reliable and fast to get up and running even on locked down computers.
    f. More tips on hosting and troubleshooting zoom meetings can be found here.

4) **If your meeting is likely to include more than 300 participants**, we recommend scheduling more than one meeting time and/or dates. This has the benefit of offering participants flexibility, as well as making each meeting more manageable.

5) **Participant interaction with ~20 or fewer people:** You can choose to allow people to chime in verbally, but you should:
    a. Ask people to "raise hand" (under the Participants menu) or chat to the moderator when they have a questions/comment. You can also ask people to send in questions or comments ahead of time.
    b. Designate a moderator (a different person from the one leading the meeting) to call on people. Either ask everyone to mute their lines until they're called on, or mute everyone and un-mute them one-by-one when you call on them. This requires that everyone enters their Participant ID when they dial in to the meeting, so that you know who to unmute.

6) **Options for participant interaction with more than ~20 people**, where verbal discussions aren't feasible:
    a. Using the Chat feature in Zoom

i. Use the Chat feature in Zoom for people to submit their feedback and comments. In the chat window, click on ... to determine whether people's comments can be seen by everyone or just the host.

ii. In the chat window, under ..., you can select "Save Chat" to create a log of the comments and questions received. You can respond to them immediately via the chat feature, or respond later and post responses online.

b. Mentimeter
   i. You will need a Mentimeter account: www.mentimeter.com
   ii. Mentimeter allows participants to respond to open response or survey questions using their cell phones. Reponses show up "live" on the presenter's screen. Responses can be downloaded so you can post responses to comments/questions later.
   iii. You can import your PPT into Mentimeter, or switch between PPT and Mentimeter. If you plan to switch between the two, plan to have a second person involved to help make sure things go smoothly (i.e., not the speaker/host).
   iv. Mentimeter does not have any limitation on the number of participants.

c. With either format, establish ground rules/protocols and explain them at the beginning of the meeting. This should include the method and timing of participation, reminders about keeping comments respectful/courteous, and details about where and when responses to un-answered questions will be provided.

d. Record the session and post it online. This increases opportunities for people to see the presentation and participate in the conversation. Make sure you clarify that the presentation is recorded and explain how questions and comments are going to be addressed.

e. Walk audits and field work: Download the Zoom App. As long as you have good cell service, you can use the camera on your phone to take people on a virtual "walk" with you. If your audience is large, a pre-recorded video might be a better option. But the Zoom App will allow you to interact with the audience while showing video in the field.

f. If you want to experiment with a Twitter Town Hall, here is an online tip sheet: https://digital.gov/2015/12/18/twitter-town-hall-tips-from-the-va/. Here is an example of how it can work: https://twitter.com/Adweek/status/1237802504395653121.

g. Create a list of questions you think you'll get via online comments and prepare responses in advance. Work with the client to clarify who has authority to respond on behalf of the project team. For example, they might ask you to take the lead in posting pre-approved/prepared responses, while they handle developing responses to unanticipated questions/comments.

h. Think about accessibility. As with an in-person presentation, verbally state the key points on each slide to enable participants with vision disabilities to meaningfully engage. Include an option for people to submit comments via email, snail mail, or phone, in case some participants are not able to provide comments via the chat feature in Zoom. If you were planning to provide interpretation/translation services at your public meeting, it may be appropriate/feasible to offer multiple online meetings in different languages, or to record a video of a sign language interpreter.

7) **Other creative solutions to explore:**

   a. If you want to hold break-out sessions to simulate different stations at a public meeting, consider using multiple Zoom lines. This will only work with technologically savvy participants, because each “break-out” will be a different weblink and phone number. Use one line for the introductory presentation, and other lines for break-out sessions on various topics. For the break-outs, a different speaker can be prepared to present a short overview of the topic on timed intervals (e.g., a 2 min presentation every 5 min, with elevator music playing in between) and invite people to chime in via the chat feature throughout. Participants can come and go as they please, chime in or provide feedback and then jump to a different break-out session.
   b. Consider using video chat to have the client PM available to answer questions live. Live video will humanize the session and could lead to more meaningful participation by the audience. Participants can enter questions via Zoom chat and a moderator can select a subset for the client to answer live. You can supplement public questions with some canned questions that the client PM is prepared for.
   c. Consider pre-recording a presentation that presents key information about the project. Pre-recording allows you to avoid technical glitches and allows the entire project team to focus on engaging in live chat with people online (e.g., using the Zoom chat feature). In this option, each project team member who is deputized to provide official responses can login to Zoom with a username like “Bike_Plan_Team_1” so that it is clear who is speaking officially on behalf of the project/client. After the meeting, the pre-recorded presentation can be posted online for people to watch on an ongoing basis.
   d. If “live” participation isn’t essential, it may be feasible to develop a custom online platform/website where users can comment on a map or PDF document.

8) **Practice.** Employ your colleagues and members of the client team, to do a dry run and test all the technology that you’re using. Ensure that all speakers test their microphones before the live session. Designate a person who is in charge of logistics and technology (someone other than the meeting host/facilitator).

9) **Share your experiences.** Please report back on what works and what does not.