

Moving dialogue online

A guide to shifting conversations onto virtual platforms

MOVING DIALOGUE ONLINE

Online dialogue is fast becoming our default method for community and business interactions. With many of us still finding our feet in this space, this document aims to offer some guidance for how to get conversations up and running, and make online, multi-stakeholder dialogue effective. While nothing can replace face-to-face community building – looking people in the eyes and coming up with conclusions together – there is lots that can be done to reestablish that human connection virtually.

Moving dialogue online requires some degree of adaptation but luckily a lot of offline tools (sticky dots, post-it notes, consensus building exercises) can be recreated digitally, allowing participants to document what they prefer, have a debate and reach consensus virtually. Indeed, many engagement practitioners are already using online methods – from online document co-creation to surveys – and considering most of pre- and post-event communications has been online for some time, there isn't a need to completely reinvent the wheel. When we break it down, moving dialogue online need not be scary and can in fact can be a fun challenge!

The important thing is to remain responsive to changes so you are useful for your audience both now and when we return to the new normal. Ultimately it's about giving people options for participation, tailoring sessions to suit individual needs, creating a safe place in which people feel comfortable to participate, and keeping them motivated throughout – so no different to an offline setting!

We hope you find this guide useful to your work. Please share widely and get in touch if you have any queries or comments.

Sophie Laggan

SOPHIE LAGGAN

Research Associate and Public and Community
Engagement Officer, UWE Bristol

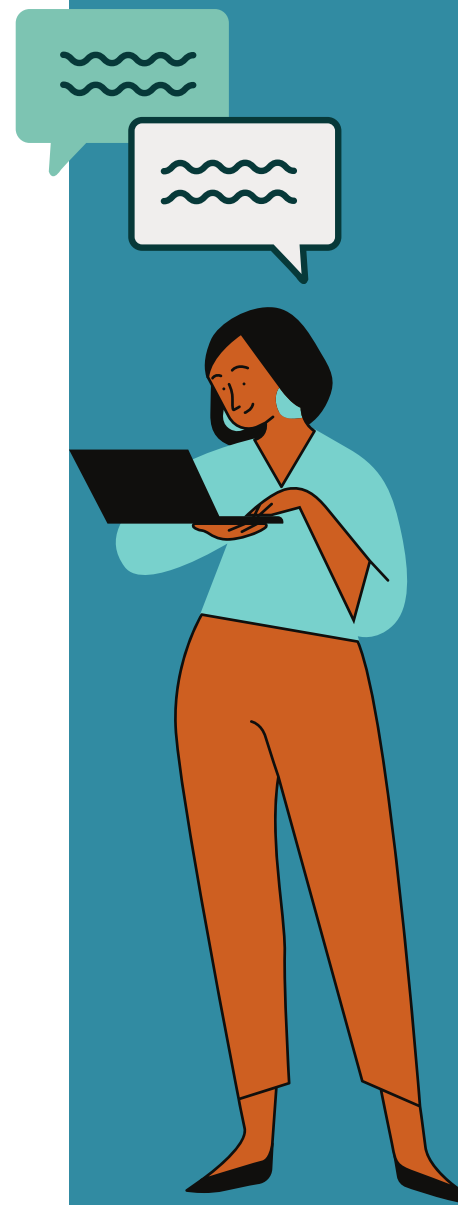




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MOVING DIALOGUE ONLINE

THE BENEFITS



- | | |
|--|---|
| Fewer costs | No catering, no room hire, no printing, no travel. IBM saved 70% of their budget on travel as a result of online events*. Reduced costs means budget for TED-level speakers, to cover childcare costs or to offer internet/tech for those in need. Fewer costs also mean reductions in carbon footprint (although this doesn't account for the environmental impact of servers!). |
| Increased flexibility | Events no longer need to be time- or location-bound, which allows greater access (senior management can review the events, people with caring responsibilities can tune in in their own time, etc.). |
| Enhanced efficiency | Collaborating remotely can make teams up to 17% more efficient*. Time is saved typing up paper notes and post-its, and deciphering people's handwriting. |
| Increased diversity of certain groups | Geographical and mobility issues are removed, enhancing attendance reach. Online spaces are also beneficial for introverts and people living with certain conditions that affect communication, e.g. autism. |
| Greater transparency | All data can be made available on the online environment you create (e.g. Slack), allowing participants to build trust and greater understanding of the project and their involvement. |
| Upskilling | Teams and participants enhance their digital literacy |

*MURAL COMMISSIONED STUDY BY FORRESTER

MOVING DIALOGUE ONLINE

THE CHALLENGES

Hard to build initial momentum

May find resistance to being online (especially if already fatigued from online working). Distraction is easier online and it can be hard to keep people motivated throughout the engagement cycle.

Can lose people

Physical and psychological barriers exist – from access to and aversion of technology to privacy concerns.

Different dynamics

Individualist cultures more likely to be frank and confrontational online while collectivists can see it as a threat to group cohesion. Psychologically, online spaces feel more formal and it can be hard to find a quiet moment, leading participants to feel overwhelmed.

Oppression can be exaggerated

Voices can become more polarised online. Participatory bias can also lead to spaces being dominated by men with higher incomes.

Restructuring and timing

There is a greater need to look at participants needs (home life demands, attention span) and then build your dialogues around these issues.

Varying digital literacy

Certain groups may not have had much experience in using online platforms and tools. This can feel daunting.

Can limit independent thought

Availability of online resources may limit creativity when problem solving (e.g. you can Google it)

Safety and privacy issues

Many online platforms and tools are US based, meaning privacy laws fall under national jurisdiction. As such, many of these are not GDPR compliant.



ONLINE PLATFORMS AND TOOLS







Ways in which tools can be used:

- To focus a topic
- To assess knowledge and discuss a topic
- For scientific outreach
- To brainstorm and prioritise challenges
- To generate solutions
- To find consensus or discuss options

PLATFORMS

COMMUNICATING WITH PARTICIPANTS

When choosing a platform, it is worth considering the number of participants, panellists and support staff, as well as ethical compliance with your organisation. Below is a brief comparison of the main platforms available for live communication (e.g. events, workshops). Consider Slack for collaboration and updates throughout project processes.

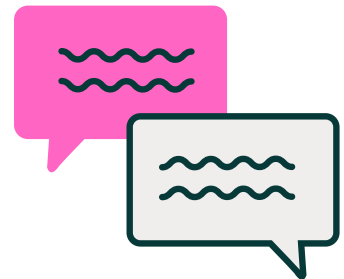
Platform		Details
Zoom		Stable, reliable, 40 minutes free, chat, whiteboard, polls, recording and breakouts.
GoTo		Easy to join, stable connection, no polling, no breakout.
Microsoft Teams		Suitable for internal project management (e.g. document co-creation).
Jit.si		Open source, however, like Teams, quality gets worse the more people use it.
Google Meet		Can integrate with other Google services. Currently doesn't allow recording.
Blackboard Collaborate Ultra		University virtual learning environment with same functionality as Zoom. Can share screens and documents, plus separate chat for moderators.

PLATFORMS

INBUILT TOOLS

Most of the aforementioned platforms have some level of interaction. Blackboard Collaborate Ultra (BCU), for example has the following:

Chat boxes: allows everyone to chat with each other in the group and allows moderators to send private messages and chat with fellow moderators in a separate chat. Participants can chat with each other privately, and the host has the option to monitor these conversations. The everyone chat can be useful for ice breakers (e.g. asking participants where they are from in the world), for taking questions for speakers or with regards to using the technology itself.



Breakout rooms: can be used by moderator to assign or randomly assign participants to smaller working groups (like you would offline but instead sending them to private online 'rooms'). These rooms can allow participants to get to know one another, to take more effective decisions (than in a big group) or to tune in to a particular themed session, for example at an online conference.



Hands up function: can be activated by participants if they have a question (e.g. experiencing difficulties with technology, the pace etc.)

Polls: useful to keep participants engaged, breaking up time between speakers/activities, to ask the audience for their opinion, to test their knowledge and/or to contribute directly to evaluation.



Content sharing: by participants or just the presenters and moderators. As embedded graphics are lost on presentations in BCU content sharing can be used to show videos, gifs, etc.








Whiteboard: allows everyone to contribute ideas on an issue in real-time. There are also pens which participants can use to circle a presenter's slides. A word of warning: this can become chaotic with many people, and could lead to misuse of the technology.

[Click here](https://help.blackboard.com/Collaborate/Ultra) for more information on how to use BCU, or head to: <https://help.blackboard.com/Collaborate/Ultra>

COLLABORATIVE TOOLS

STRUCTURING WORK

Having found the right platform, a structure has to be developed to enable collaboration. This entails determining what questions need to be answered and how participants need to interact with one another. Once these are established, the appropriate tool can be selected. Bear in mind that each time a tool is introduced training/instructions will be required.

Tool	Function	Details
Google slides/docs 	Co-create slides and documents and contribute in real-time.	Familiar and accessible for most; excellent for simple collaboration.
Kialo 	Structure discussions online and share the world over.	Arguments arranged according to impact.
Mentimeter 	Make presentations interactive.	Live polls, graphs, word clouds, quizzes, etc.
Miro 	Plan out workshops, mind map.	Suitable for longer term projects and design thinkers.
Mural 	Brainstorm, prioritise, vote, rank. Understand your audience.	Good for workshops. Can use persona templates to step inside shoes of audience.
Padlet 	Ice breakers, introduce topics, discuss ideas, make timelines.	Easiest tool to use however not much functionality
Slido 	Make presentations more interactive.	Same functionality as Mentimeter. Benefits from integration with Google Slides.

MAKING REAL LIFE CONNECTIONS

CITIZEN SCIENCE

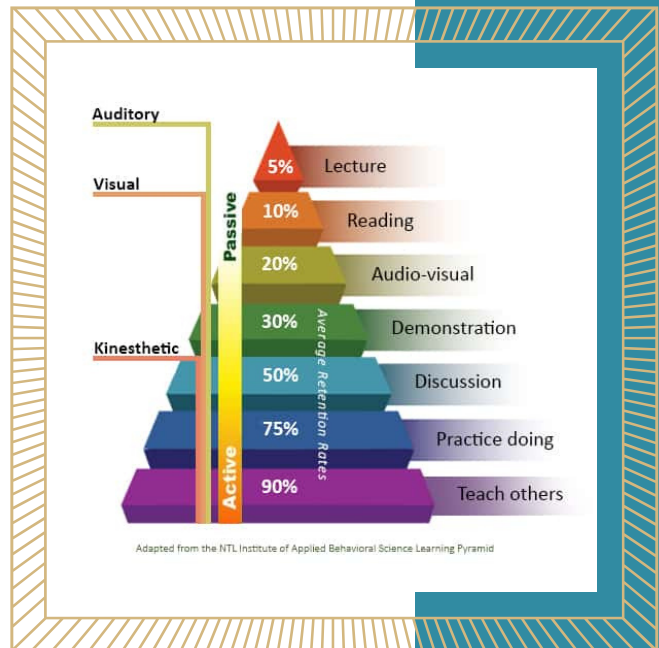
Effective online engagements make use of the participants' online environment – making the connection with real life, topical issues, and allowing them to have an immersive experience where they practice doing the science or even teaching others. This same principle applies with offline engagements also.

For example, trust is a big issue online, from fake news to trusting fellow participants and collaborators. By building relationships with your participants (ideally by speaking to them or meeting face-to-face if possible) and by allowing them to build trust in the data they are exploring, you can create safer and more supportive online environments where trust becomes a guiding principle.

To create such an environment you could run an exercise where participants are shown an image (relevant to your topic) with three possible answers. Their task is to search Google to find the right answer. In taking ownership of the process they can become investigators and come to their own conclusions, drawing from sources they trust. You could then have a discussion with participants on the difference between a blog post and verified source (e.g. journal article) and start to explore what is a good, reliable data. These types of exercises are useful to explore different perspectives and belief systems – question what we know to be true – and to learn more about one another in a fun and supportive way. Citizen science methods could also be explored offline (see next page).

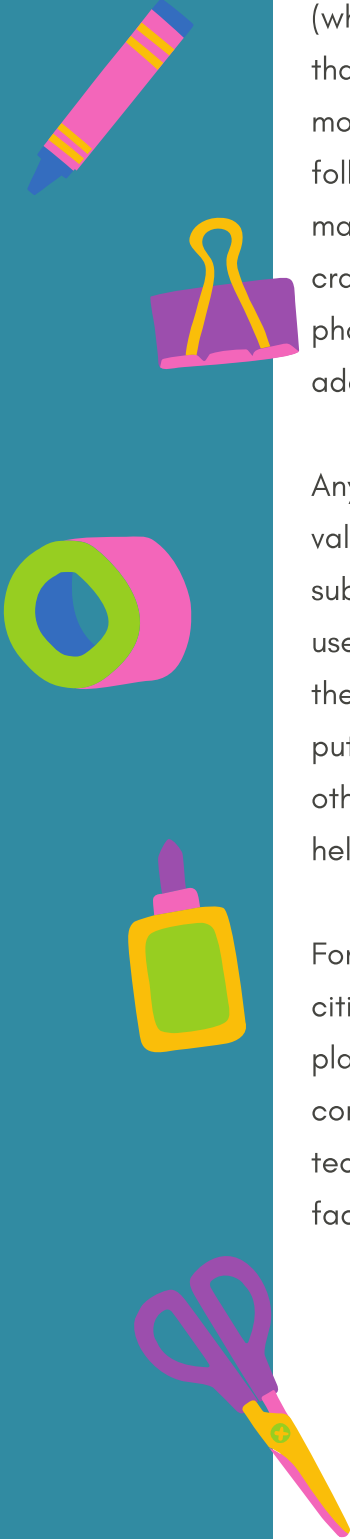
Did you know...

A full screen image is a more powerful form of communication in online settings than offline. As they say: a picture paints a thousand words.



MAKING REAL LIFE CONNECTIONS

UTILISING THE OFFLINE ENVIRONMENT



Given the existing digital divide and access issues it is important to think of ways to overcome these beyond training and technology (which cost time and money). Many more people have a smart phone than a laptop for instance so ensuring your platforms and tools are mobile compatible is key. Some items could also be printed and followed offline if necessary (though this should always be optional as many people don't have access to a printer). You could even focus on craft materials that can be found at home, getting people to send in photos on their phones via social media channels or an email address.

Any data gathered this way could go on to inform online sessions/be valid contributions to the pool of possible solutions, which are then subsequently discussed online by those with the time and resources to use these platforms. For example, you could ask children to design their ideal 'living street' using craft materials at home, which are then put forward as possible solutions at a workshop on the subject with other stakeholders. As children are often more imaginative, this could help participants to adopt a child's mindset.

For UWE Bristol's [WeCount](#) project, they are encouraging local citizens to install digital traffic monitoring sensors in their windows to play their part in tackling air pollution. These offline tools are combined with online training workshops to get to know the technology, and where appropriate are supplemented by face-to-face or online meet ups to analyse and act upon the data.

Did you know...

Mood effects not only whether someone feels they can contribute (e.g. confidence) but also the perceived quality of the outcome.

This means that if your participants are not made to feel at ease and comfortable in the setting then they may have a negative experience

ONLINE TOOLS IN ACTION

A STEP-BY-STEP GUIDE OF MURAL

Now that you have your platform and engagement tools sorted, it is time to work out how you will use them. In a not too dissimilar approach to conventional consensus-based decision making, there is a fairly uniform set of steps you need to take when reaching consensus online. We will use the example of air pollution to put things into context.

INTRODUCE THE SUBJECT

You have been tasked with bringing stakeholders together to come up with collective solutions to air pollution. Invite your stakeholders to a workshop on your platform of choice. Each person will have a different comprehension of the issues, so begin with some introductory slides by sharing your PowerPoint to explain the science, so that everyone is on the same page. Consider a quiz, or polls to keep participants engaged and to test their baseline knowledge.

DEFINE YOUR PROBLEM STATEMENT

You may have predetermined the problem statement, or you may be co-creating the process, in which case the participants will decide. This can be discussed in small groups first and then agreed upon altogether. A problem statement is a concise description of an issue to be addressed or a gap to be filled, e.g:

How can we address air pollution locally, in our neighbourhood?

BRAINSTORMING

Encourage participants to write down some ideas on how they might tackle the problem. Get them to be as creative as possible - "if you had an unlimited budget...". If you made use of offline craft activities with say young people in a previous session (see page 10), you may wish to use these here as a source of inspiration for the teams.

There should be no judgement of ideas or room for discussion. Different platforms can be used for discussion at a later date. First round: allow participants to work individually, writing ideas anonymously on digital post-its in Mural. Second round: build on the ideas of others.

GROUPING

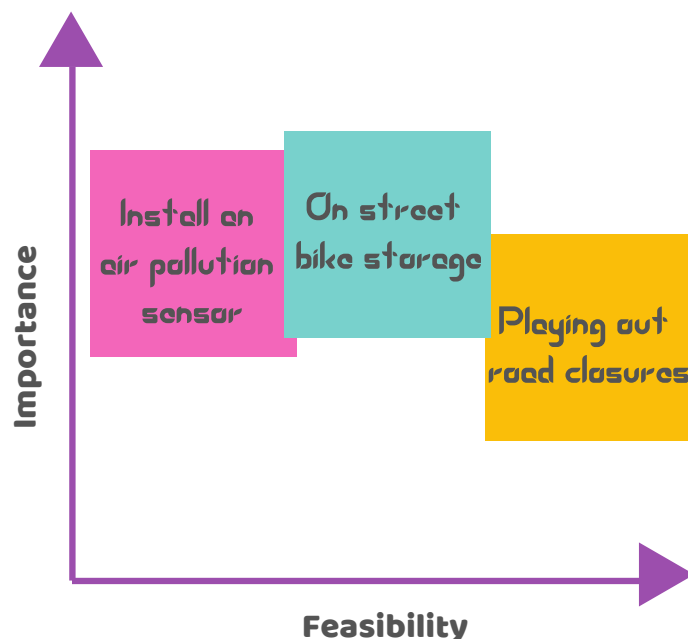
Ideas can then be grouped according to certain themes, colour coded and images added (see example on next page).

VOTING

Voting can be launched in Mural, which uses sticky dots to register preference. If using Google Slides instead, you may need to ask participants to fill out a poll/show hands for their 1st, 2nd and 3rd choice.

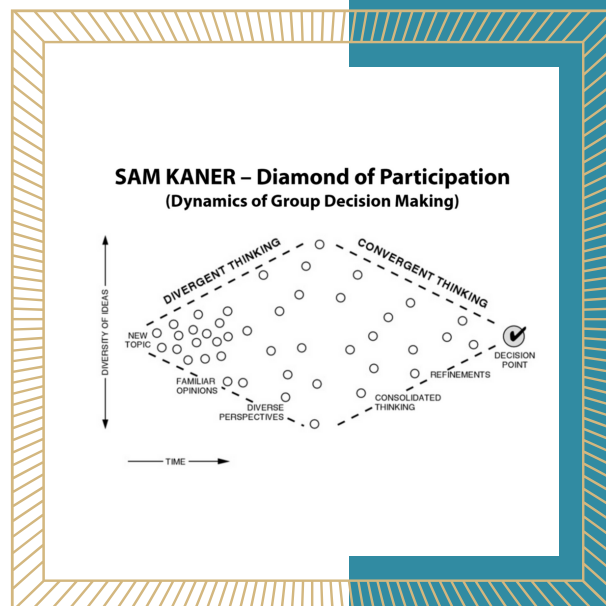
IDEAS PRIORITISATION

Small groups can work together in Breakout Rooms to prioritise ideas according to feasibility and importance using the template in Mural or you can create a Google Slide with post-it style boxes arranged on a slide for participants to move along a spectrum of importance (from low to high). Through the discussion the aim is to reach consensus. The idea is not to discuss the ideas themselves, but how important they are. Bring everyone back together and discuss similarities and outliers between groups.



REACHING CONSENSUS

Having started from a place of divergence to explore ideas, through careful facilitation participants will have become aware of diversity and possibilities and most likely succeeded in navigating the groan zone*. If this is the case, participants will find themselves at the point of convergence, a place of excitement in bringing ideas together to reach consensus. In this final step, conclusions are drawn and a winning idea is agreed upon. You may also wish to spend time or another session on how to action the winning idea. For example, if the community want to have on-street bike storage, who do they need to speak with, how will they raise the capital, etc.



*where new ideas emerge and don't seem to be the property of anyone in particular but rather a group decision

MURAL BOARD



FACILITATION SKILLS

Groupthink is more prevalent in online settings – individualists try to rock the boat and collectivist tend to share and agree. So too is disruption, from emails, children and the like. To overcome these challenges: ensure there is equal comfort with the interface, include video for facial and verbal cues, make timing visible, and have moments when participant mics can be on and off. Much the same as offline, actively listen to participants, verbalise what's happening and repeat back what people are saying. Offer lots of breaks and off-screen activities or self-guided learning where possible to suit different needs.

Take time to get participants moving and interacting in informal ways. Spend 15 minutes on this for each 2-hour event. Offer regular, varied interaction changing activities every 5–10 minutes. Throw in a poll or questionnaire, change speakers, and add in spontaneity if participants appear low on energy. Think about physicality (shapes, high fives and 'armmometers') so people get their body moving.

Making use of physical environment

Participants can use the following to interact with you:

Arms – 'armometer' using forearm to measure energy levels, or expertise, for example; crossing wrists for no (X) or using forearm and hands for yes (✓)

Hands – thumbs up, thumbs sideways (maybes), thumbs down, using fingers to measure out of five

Bodies – move and shake, shake head yes/no

Breath – exercises to tune in with body and connect with others

Animate faces – smiling, scrunching, pulling a sad face

Objects in the room – for show and tell, drawing responses using pen and paper

Making use of online environment

Use gallery view so participants have the option to see one another

If groups are relatively small, encourage them to share screens, take photos, use search engines

Create breakout rooms for small group discussion



FACILITATION TECHNIQUES

Technique	Why use?	Ideas
Check-in, warm up and break ice	Sets the tone for participation Reinforces human connection Establishes a framework (safety, ground rules, expectations) To learn name (pronunciation and pronouns)	Renaming title on platform to where they are from/ pronouns/one word – how has your day been today Armometer/fingers – how are you feeling/what's your energy level? Breathing exercises Breakouts – show and tell Reflect on previous sessions (use chat, thumbs, etc)
Energisers	To counter heavy mental load of screen time (break flow, disconnect, play and focus) To counter multi-tasking (check participants are still there) To bring energy up To organise some social time	Show me something – to drink from; made of wood; alive Circle finger on left hand; circle right; square with left; square with left and circle with right Wriggle fingers, shake hands, circle shoulders, bunch shoulders on inhale and drop on exhale Make shapes with hands/body/whatever you have available (e.g. heart, house, tree) Draw 'your favourite food', 'what you love about your street', 'how you feel after a day of being online' Ask participants relevant questions to previous segment, to see if still awake



MODERATING ONLINE

The moderator has a very important role to play. They are responsible for creating a welcoming environment for participants, maintaining rules of interaction, creating space for participants, ensuring equal participation, keeping on topic and keeping the conversation flowing, and clarifying any questions that may arise.

Top tips

- Always keep audience experience in mind – don't get too lost in content of speakers; acknowledge people. Use visuals and encourage participants to use their body, breath and environment to connect with their experience.
- Use slides and sketchnote (e.g. a professional illustrator) to breakup sessions and reflect back takeaways after each segment. This will also accommodate for people's shorter attention span.
- Encourage speakers to focus on real-life context and stories, as this is likely to keep audience engaged. Encourage audience to interact with check-ins, chat, polls, voting, comments on questions etc but avoid live video questions with large numbers as this can get out of control/be difficult to manage.
- Keep team connected on a messaging platform like Slack (to connect throughout the process and resolve problems, etc.).
- Find inspiration online – watch other webinars

MULTI-STAKEHOLDER PROCESSES

Multi-stakeholder processes bring together different actors that normally wouldn't interact with each other very often (academia, research and innovation, policy, civil society, public (or citizens organisations), industry) and try to make them cooperate together towards a common objective. They are used to ensure participation on a specific issue, building trust between different actors to develop together mutually acceptable solutions and ensure participatory equity, accountability and transparency. If shifting online from an existing ongoing process then people already know one another. This makes it easier to manage in terms of interaction but on the downside, it requires some major re-planning. New processes have the difficulty of trying to create human connection however they benefit from being able to plan things with an online environment in mind from the start, and recording sessions for those that would otherwise be unable to attend.

MAKING PROCESSES INCLUSIVE

- Reach out to the groups you seek to include. As you may be left with indirect pathways to certain groups (i.e. those not digitally literate/without access to a computer) it may be necessary to work with an intermediary (e.g. carer, teacher)
- Provide participants with simple internet-enabled devices (e.g. smart phone) and a remote onboarding process. Consider incentives for participation, e.g. 'learn a new skill', 'meet your neighbours', etc
- Think of all aspects of inclusivity (e.g. contribution for participations, babysitter vouchers). If it is not possible to take care of all this in-house, collaborate with local associations
- Accentuate the positives and know you cannot be everything for everyone

THE CO-CREATION PROCESS

FOUNDATIONS OF SUCCESS

Mapping

If the project has not yet started, map out all of the stakeholders and figure out how and when they need to be involved or informed.

Teamwork

Design and structure of the process as a team. Online templates such as the timeline in Padlet can help with co-creation. Think through all aspects of the co-creation process including tools for video conferencing, community engagement, collaboration, design sessions, etc.

Responding to needs

If shifting from an existing offline process, work will likely need to be re-framed to focus on human need (e.g. caring responsibilities, digital literacy) to allow co-creation to unfold. Shorter, more structured sessions and continuous evaluation throughout will help account for reduced attention spans, additional needs of the participants, and the inability to 'read the room'.

Building community

Before the main bulk of work commences, take time to get to know participants, ideally face-to-face (e.g. one-on-one in an outdoor location) – if they feel relaxed they will feel more creative! If this is not possible, consider 'buddying' participants up with one of the project team, or organising participants into working groups from the outset so they feel a sense of community. Online communities can help to keep people motivated, such as WhatsApp or Slack.



THE CO-CREATION PROCESSES

A WORKED EXAMPLE

The challenge: how to tackle air pollution in a collaborative and community-orientated way, making use of simple and accessible technology and materials, and leading to real-life solutions. You have three weeks. It takes place entirely online. There are 15 participants from civil society organisations, sustainability professionals, Non-Governmental Organisations (NGOs), marginalised communities and activists involved, and a local Charity willing to fund at least three ideas that emerge from the process. The city council is interested but the civil servants are too busy to participate in the process, so ways need to be found way to keep them involved. Five experts from your institution can be called upon throughout the process.



Step 0: get to know participants

Once consent for participation has been granted in writing, send out an online survey to understand needs, concerns, expectations and challenges of participants, as well as to inform participants of your expectations (a contract). Spend as much time as needed to develop relationships with participants and get the most out of them. Perhaps call them first, or meet face-to-face where possible.



Step 1: training and getting to know each other

Meet online (e.g. Zoom) and set up a space for ongoing conversations (e.g. Slack, WhatsApp). Find out what people care about, their motivations, and develop the community. Have fun (e.g. using games, polls and energisers). Introduce participants to the local Charity and experts. If participants are time poor, pre-record the content for self-guided viewing, done in own time. For participants unfamiliar with software, offer online tutorials. Encourage participants to document their journey (e.g. pictures if everyone consents). Evaluate session with an in-built survey at the end.

2

Step 2: expert webinar

Meet online to share knowledge of subject and be open to questions from participants. Hear from the local government representatives about problems they are facing. Encourage participants to use their input to inform ideas generation. Option to add a quiz to test understanding of issues faced. Again, this could be self-guided and should include an evaluation survey.

3

Step 3: Defining ideas for intervention

Introduce a contextualisation exercise: *how has life changed as a result of air pollution?* Ask participants to write ideas on post-its individually using Mural. Discuss in working groups (that participants choose or facilitator randomly/strategically assigns) and then share. Follow on with the main question you are seeking answers to. As with the Mural example, follow the following steps: brainstorm, group, prioritise and vote. Include evaluation form at the end.

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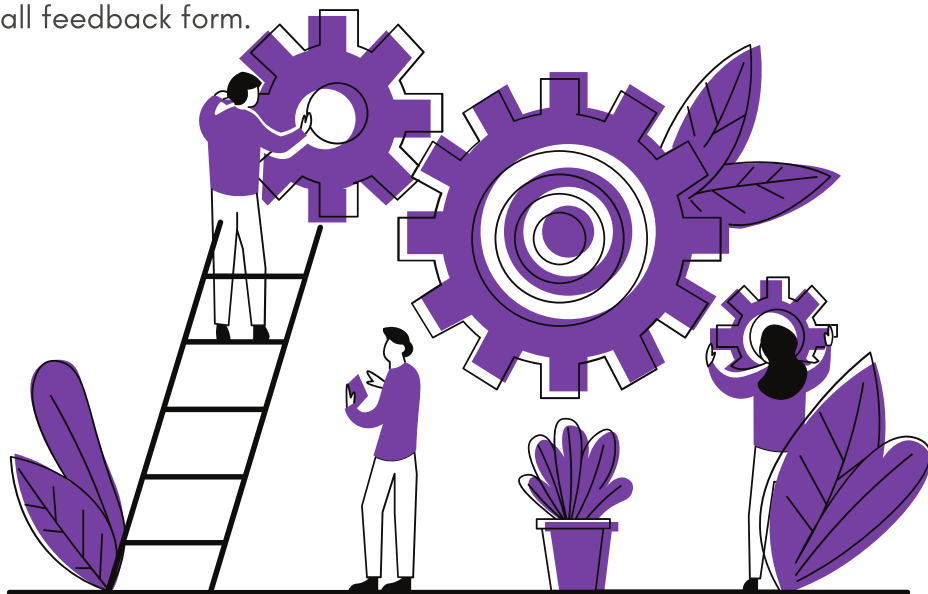
Step 4: subgroups to flesh out top interventions (hackathon)

Have working groups refine interventions in breakout rooms. First, find out what's already out there (e.g. Google search), then discuss: How will we get there? What do we need? Work backwards from final goal. Experts or ambassadors could facilitate. Have participants complete an evaluation survey.

5

Step 5: final presentation/pitching innovations

Each team pitches their ideas to a panel (e.g. Charity and council) who decide on 3 final prototypes to fund. Thank participants and celebrate. Send overall feedback form.



PRIVACY COMPLIANCE

To be GDPR compliant, in addition to gaining consent from your participants to use their data, you need to briefly explain about the processing of personal data in written and verbal form, before the processing takes place. You will also need to choose a platform that has been approved by your institution/organisation. If there isn't one, consider the following. Secure your meeting and recording with an 11 digit meeting code and complex password, enable a waiting room so you can check admittance and selecting the meeting lock feature to prevent uninvited guests from entering. Remove and report unwanted guests. As host, you control whether content is shared, control the chat and the ability for people rename themselves. If using Blackboard Collaborate Ultra: you can check 'anonymise chat' in settings so no names are recorded. Lastly, if a child appears unexpected on screen, then a brief appearance is fine.

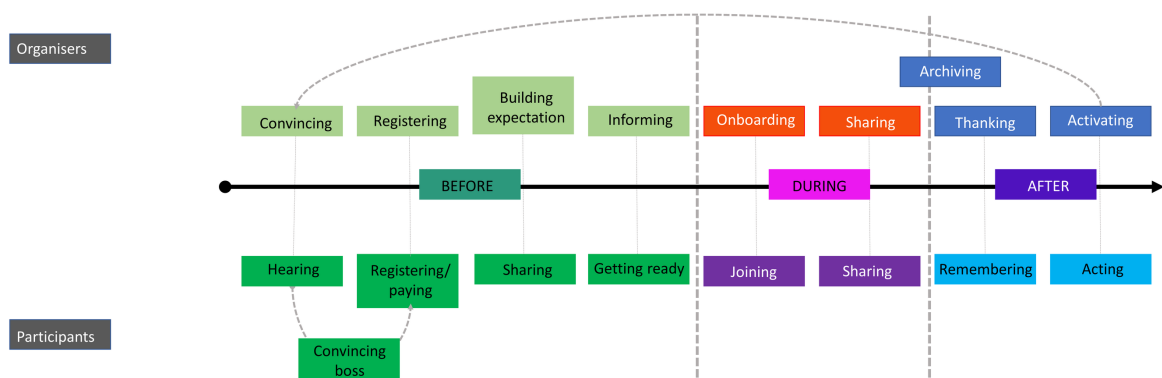
GDPR terminology	Description
Personal data	Anything that might identify a person (e.g. name, D.O.B, address)
Biometric data	Relating to someone's characteristics that are uniquely identifiable to that person e.g. facial images, fingerprints, etc
Processing	Relating to someone's characteristics that are uniquely identifiable to that person e.g. facial images, fingerprints, etc
Controller	Any operation performed on this data (e.g. collection, recording, storage, alteration, destruction)
Consent	Of the data subject, given freely, with a specific, informed and unambiguous indication of their wishes (e.g. via a recording or in writing)

EVENTS COMMUNICATION

There are four main reasons for event communications: to inform participants, to market/promote your event, to create a buzz, and to build community. Clear communication with your participants more important than ever, ensuring everything is transparent and participants know what they have signed up for. Clear communication can add value to your online processes, building trust and familiarity for participants – a 'brand' they can trust. The process includes the following stages:

- **Setting up your URL:** Keep all communications on one main site (e.g. website, Facebook) and make sure registration is maximum two clicks away (to keep people engaged)
- **Developing visuals and branding:** creating a coherent environment (branding, logos, nice speaker backgrounds (e.g. with something to represent your brand)) that appeals to your audience
- **Registrations and onboarding:** using built-in forms and emails, will virtually take attendees by the hand to make them feel welcome
- **Social media integration:** ask participants to be 'on-the-ground journalists' to increase your profile and lighten the work load. Consider going live on Facebook or YouTube

- **Archiving and sharing record and report when you need**



CHECKLIST: PLANNING AND FOLLOW UP

- | | |
|--|--|
| <input type="checkbox"/> Review your goals and your audience | 1. Think again: why are you doing this and plan activities accordingly
2. Has the context of your audience changed since going online (e.g. digital literacy, time zones)? Think through the adaptations you need to make to improve accessibility |
| <input type="checkbox"/> Choose platforms and tools appropriate to group size | From intimate to impersonal: 5–15 (Shared docs, Miro and Mural); 15–35 (ideas sharing on whiteboards or via Mural/Miro/Padlet); 35–50 (keep engaged through chats and Q&A sessions); Large (50+) events (facilitated Q&A and polling with Mentimeter or Slido) |
| <input type="checkbox"/> Choosing the right format for your needs
<input type="checkbox"/> Check format will work for mobile phone users. | Do you want to deliver a webinar/talk; How-to tutorial; Interview/ QA session; Panel; Group discussion (e.g. Fishbowl); Design sessions (e.g. World Café); or a mixture |
| <input type="checkbox"/> Set time and dates according to needs of participants | Consider childcare, time zones, religious commitments, etc |
| <input type="checkbox"/> Determine whether you need one session, or multiple, and what can be done in people's own time. | People can only cope with so much screen time! For example, turn a one-day workshop into two/three 2-hour sessions in the same week. And remember: everything goes faster in an online format |

THE TECHNOLOGY

- ☐ Setup two laptops if you can in case one crashes
- ☐ Keep desktop clear, closedown tabs and close any emails/turn off notifications so if you share your screen there is no risk of the participants seeing any personal/classified information
- ☐ Have a Plan B for everything
- ☐ Setup a WhatsApp group for facilitators (can use moderator chat in Blackboard Collaborate Ultra)

REGISTRATION

- ☐ Choose a platform that makes sign up and access easy
- ☐ Set price (consider free/sliding scale to increase accessibility)
- ☐ Determine data you need to collect (e.g. demographic, session preferences, accessibility information, training)
- ☐ Ensure there is consent to collect this information
- ☐ Include a sentence to say something like I consent to the processing of my personal data for the purposes related to participation in this engagement process
- ☐ Never share links broadly (e.g. social media) – make invite only to ensure the event is not hacked by outside groups

TIMING AND REHEARSAL

- ☐ Do a technical run-through (e.g. test out functionality)
- ☐ Ask external team members to chip in with the preparations; to give their feedback. They could learn something too!
- ☐ Practice with your speakers several times, and to check timings
- ☐ Train your participants prior to the session in the technology (e.g. could offer a one-page instruction leaflet plus optional online testing)
- ☐ Provide clear instructions for facilitators and staff in advance (drip feed where possible to avoid feeling overwhelmed)
- ☐ Determine what needs to be recorded and on with what tool

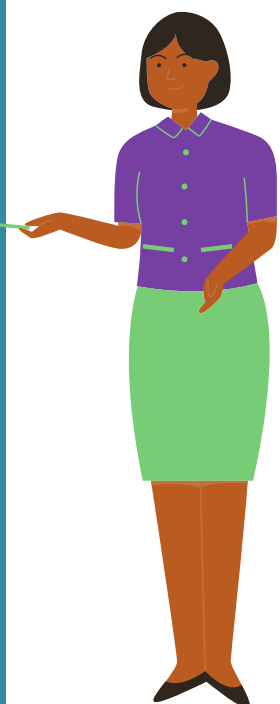
ON THE DAY

- ☐ Facilitators for main event and enough for breakout sessions
- ☐ Volunteers (participants) to take notes and/or report back
- ☐ Tech support
- ☐ Several separate people recording so you can see facilitator layout as well as gallery view, etc
- ☐ (optional) Graphic facilitators (e.g. sketch notes)
- ☐ Extra people to moderate chat
- ☐ A co-host who can step in as the lead facilitator if something goes wrong with the tech of the main speaker
- ☐ Ask participants to rename themselves with the name of the breakout session selected (if relevant). The facilitator then stays in the main room to deal with any participants that haven't been allocated a room

EVALUATION

- ☐ Capture behavioural changes and learning outcomes during or immediately after event has taken place
- ☐ Ask open, non leading questions
- ☐ Think outside the box – can you use screenshots, 'handometers', quizzes or games to capture information?

TAKE HOME MESSAGES



1. Get to know your participants backgrounds, interests, working methods, engagement styles
2. Figure out what tool is good for your audience
3. Share tools in advance and even offer pre-event tutoring
4. Assess and test tools and platforms; tech; budget; contingency plans, prepare an emergency contact for trouble shooting
5. Give options, keep it simple, provide clear, instructions and mechanisms to suit needs
6. Foster personal interaction as much as possible, where participants can resolve problems in a forum, smaller working groups, and a contact for troubleshooting. Ask participants to personalise accounts and make the online process feel as inviting as possible

Good luck!



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