APRIL 2020

Distanced Engagement Resource Guide

Community engagement approaches for physical distancing

About this Resource Guide

Community engagement traditionally relies on in-person interactions with residents, government agencies, community organizations and other groups involved in shaping public decisions. With the onset of COVID-19, basic assumptions about how community engagement is implemented must be rethought through the lens of physical distancing. Though limitations on gatherings make community engagement more challenging, technology and creative innovation offer new avenues for engaging residents, governments, community organizations, and other stakeholders in meaningful ways.

This resource guide was developed by staff from the University at Buffalo Regional Institute (UBRI) to help our team and community partners think about ways to transition engagement to a remote setting. Focusing on the more common engagement approaches we use in our work, it covers ways to deploy different types of **community and stakeholder meetings online**, how to get the most out of **surveys**, tips for **engaging targeted groups or audiences**, and how to leverage **digital media to support outreach.**

Engaging beyond in-person meetings does not reinvent the engagement toolbox. Online engagement and other creative strategies have increasingly become the norm in recent years. As the planning field and communities bounce back from this period of uncertainty, some of these practices will continue to play a role in engagement, even as we get back to the in-person setting. Therefore, this toolkit is not only a resource for physical distancing, but also represents good engagement techniques for any scenario.

The list of options presented is not exhaustive. However, this resource guide presents some common engagement methods used by the UB Regional Institute in recent projects and describes some of the ways they can be employed under physical distancing circumstances. Each project and engagement challenge is unique, so it is critical to craft a clear and robust strategy that responds to specific circumstances, audiences, and feedback goals of each project.

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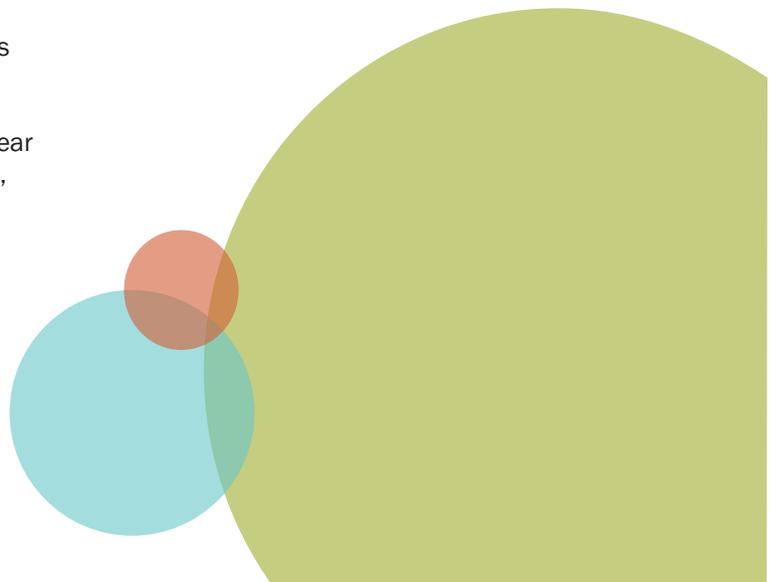
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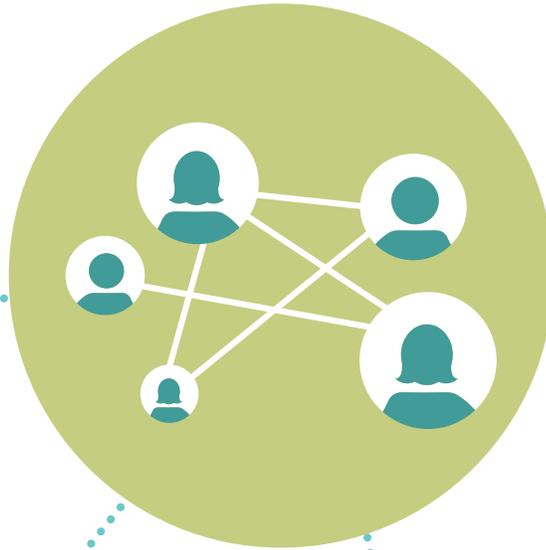
Community and Stakeholder Meetings

An overview of types of meetings, and strategies for alternatives to in-person meetings.

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Strategies for engaging youth, existing community groups and organizations, and other smaller sub-audiences in the community.

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Community and Stakeholder Meetings

Community meetings are one of the most direct engagement methods for reaching residents and other stakeholders. Person-to-person group interactions allow ideas to evolve and build upon each other, rather than individuals sharing perspectives and information in silos. Meetings also disseminate information about projects and processes in a setting where participants can respond with feedback directly with decision-makers. Traditionally, meetings are a more democratic form of engagement because they do not require participants to have access to specific technology or tools. In the time of physical distancing, community engagement must remain democratic and equitable, but it also needs to maintain the same level of meaning and quality provided through in-person meetings.

Common types of public engagement meetings

Community Workshops: Community workshops are often held at the formative stages of a project and aim to gather ideas to inform key elements of a project. These meetings can take a lot of different forms, but usually involve interactive participation activities preceded by a presentation of the project scope, goals, and preliminary analysis of the issue at hand.

Project Check-ins/Information Sessions: As projects move beyond the ideation stage, it is important to keep the community engaged and "take the temperature" of the public at key project milestones. The design of information session meetings can vary, but often involve a presentation of interim proposals or concepts with some opportunity for community members to ask questions, offer feedback, or vote on different options or scenarios.

Stakeholder Meetings: Unlike community meetings, stakeholder sessions involve a more targeted audience and have a specific invitation list, usually including organization representatives, subject matter experts, business owners, or community leaders.

Overcoming Access Barriers

Ensure meeting **participation can happen via mobile phone** for people without computers.

Explore **simulcasting or re-airing online meetings** on public access television or a local radio station so people without internet access can participate.

Do not rely solely on audio or video participation for feedback, so participants with low-tech devices are not excluded.

When possible, and depending on the audience, provide written materials (and translation services) in common **languages other than English.**

Record and share meetings on project websites or other platforms, allowing people who are not available at the time of the meeting to participate. Ensure participants are aware they are being recorded.

Choose **digital tools and platforms that are easy to use** and understand, free to access, and that do not require participants to have an account (if possible).

Share **simple, step-by-step instructions on how to participate** using clear language and graphics.

For smaller meetings with attendees that are invited in advance, **connect with participants on an individual basis about barriers** they may face and **tailor participation tools** to accommodate them. Resources like **Mission Ignite** offer low-cost/free computers, and some library systems loan mobile hotspots.
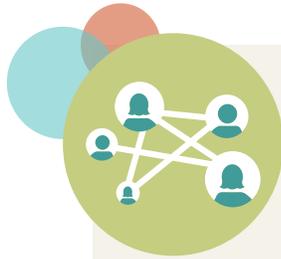
Community meeting approaches for distanced engagement

Virtual comment cards: Similar to a comment card that may be distributed at the end of the meeting, a link to an online survey or form can be shared and linked via the teleconference platform.

Live polling/voting: Many of the teleconferencing platforms allow for live voting. This could be used to gauge levels of agreement on the presentation of project goals, objectives or value statements, or to replicate "sticker exercises" where meeting participants select their favorite approaches among a set of choices.

Break-out groups: The use of break-out groups can offer opportunities for people to talk about their perspective in a small group setting. Similar to an in-person meeting, this approach requires a facilitator for each room that manages discussion and documents input, so it may not be ideal for very large groups that would require many facilators.

Chat comments/questions: Video conferencing platforms often include a chat tool that can allow participants to type in questions or contribute comments. This tool is also helpful in troubleshooting technical issues among participants without interrupting the flow of the meeting.

Facilitated discussions: Depending on the meeting's goals, a community discussion that allows participants to vocalize their questions or comments may be warranted. In this scenario, it is best to have people use the "Raise Hand" button built into many web conference services, and have a person other than the on-screen facilitator manage the queue of participant questions/comments.

Simulcast and record meetings: In the case of public meetings held digitally, simulcast on Facebook Live or YouTube, and make recordings available on a project website following the live session to increase access and broaden the audience reached. Send links to the recording via email to people subscribed to project updates. Accompany the video with an opportunity for people to provide input through an online survey or a "Contact Us" form, so those unable to attend or watch live can participate in a meaningful way.

Interactive mapping: Interactive online mapping tools are a useful substitute for physical mapping exercises that would typically use large map printouts, stickers, sticky-notes, pins, or markers. Free tools like Google Maps offer create quick, simple custom maps including annotated points, lines, and shapes. ArcGIS and other mapping platforms also offer paid services for interactive online mapping with more advanced features.

Surveys

Surveys are an effective tool to get input from a lot of people. They can be used to test initial findings or assumptions, gauge how people view various issues or topics, and assess the priorities of the general public. Because they do not require in-person engagement, community engagement surveys often leverage online platforms, making them a useful tool for engaging during a time of physical distancing.

When using surveys UBRI often develops creative solutions to capture voices beyond just those who may take the survey online. This can involve bringing surveys to existing places where the target audience may gather (block club meet-ups, community meetings, large and small public events) and promoting the survey with flyers, signs, and other forms of grassroots outreach.

In circumstances when in-person targeted outreach is not possible to broaden and diversify survey participation, the same spirit of those methods need to be integrated in how surveys are made available and promoted.

Overcoming Access Barriers

Consider **survey options that do not require a computer** or an internet connection, such as direct mailings, SMS text-based surveys, or phone calls.

Use **survey language that can be easily understood** by people of all education levels.

Offer surveys in the **languages most likely to be used** by your potential audience.

Disseminate surveys through existing community organizations to ensure they are reaching targeted audiences.

Disseminate surveys through **traditional media, such as television, radio, or newspaper** advertisements and press releases to inform residents who may not learn about community processes digitally.
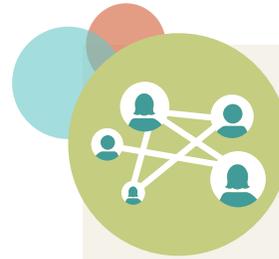
Survey approaches for distanced engagement

Enable non-online response methods: Though an online format can serve as the main way for people to respond, enabling survey participation via telephone and SMS texting can expand access to those lacking internet access.

Use mobile-friendly formats: In some communities, smartphone ownership rates may be higher than rates of home internet service. Survey tools designed to function well on mobile browsers can ease participation for people who access the internet primarily with their smart phone device. Remember to keep outreach simple, concise, and easy to navigate.

Distribute the survey with direct mailings: Direct mailings to target geographies or hard-to-reach audiences encourage people to take a survey via phone, online, or in some cases, by mailing a paper version back to the project team in a pre-addressed envelope, eliminating the need for internet access or personal interaction for participation.

Work with existing community groups: Existing community groups can be crucial allies for reaching target audiences. They are trusted messengers to the communities they serve and have built-in channels of communication to send surveys and other engagement materials directly to them. They can also act as a sounding board to help inform the types of outreach that may work best.

Leverage social media: Surveys can be shared through social media on a page created specifically for the project, on pages owned by existing community groups and partner organizations, or on Facebook groups dedicated to subjects that are relevant to the project. Though it should not be the sole outreach method, social media is a good supplement to other forms of communication and allows for targeted outreach to specific audiences.

Leverage traditional and digital media: Press releases, interviews with journalists or radio stations, or paid media can all help promote survey participation. This can be particularly helpful in connecting with populations who may not be easily reached on social media or other online platforms.

Focused Engagement Activities

Beyond large scale community meetings, engagement can benefit from more targeted participation that invites groups with a unique perspective to come together and offer feedback. For various projects, UBRI designed youth-specific activities, developed "On the Road" workshops that bring engagement activities to groups' existing meetings, and convened traditional focus groups or interviews to get targeted, specific input.

Because these types of engagements often involve interacting with groups where they already meet or congregate, replicating this approach when physical distancing poses unique challenges. Overcoming those challenges calls for creativity and working with trusted community partners, so that targeted engagement can still add value to a given process.

Focused activity approaches for distanced engagement

Bring your tools to existing community groups: Working with representatives from organizations of people in your audience, bring engagement strategies "on the road" virtually. Remember that when joining an existing group's meeting as a guest speaker, you may need to scale the meeting to the time allotted by your host. If a group is currently not employing any virtual meeting software, look to organize the technology for the group and encourage your community partner to disseminate invitations and bolster participation.

Create youth oriented web-based toolkits: Targeted youth-based activities often involve partnering with classrooms, summer camps, or other youth groups which welcome meaningful opportunities to teach children about civic engagement and community change. With these groups not meeting in-person during physical distancing, new challenges and opportunities arise. Creating a toolkit of fun and educational engagement activities for children to access online with their parents can involve children while also providing interesting activities for families to do together. This could be as simple as drawing a picture and sharing, or something more involved like an online interactive game.

Overcoming Access Barriers

Discuss potential barriers to participation with participants well in advance of the activity or event, and share relevant resources that can address these barriers, such as programs that could provide equipment or technological assistance.

In advance of the activity, **clearly communicate step-by-step instructions on how people are expected to participate** using easy to understand language and graphics.

Depending on the audience, **provide instructions for the activity in languages other than English.**

Digital Communication Tools

Digital tools like project websites, social media pages, and email distribution platforms have become standard tools in community engagement. They allow quicker, more broad access to project information, while also creating new channels for community members and other stakeholders to contact the project team.

Project websites or landing pages often serve as a "home base" for all information related to a project, including a description of the project, its goals and objectives, project team and partners, timelines, announcements of future engagement opportunities, summaries of past engagements, and a mechanism for members of the community to reach out to the project team with questions.

Social media and email blasts help distribute key project information to target audiences. Though their use as feedback tools is limited due to the difficulty of monitoring and guiding feedback parameters, they are useful for communicating important information about projects, such as project updates and information about upcoming engagement opportunities.
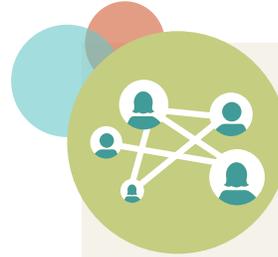
Digital communication approaches for distanced engagement

Ramp up social media outreach: Though social media has its limitations, the public increasingly relies on it for information. When in-person outreach is limited, devoting additional attention to social media as an outreach tool is a good way to reach people where they may be spending a lot of their time. This could include direct outreach to Facebook group and page administrators to ask them to relay outreach messages, paid promotional posts aimed at targeted ZIP Codes or demographics, and incorporating video into social media messages so that a project's social media presence is elevated and more intentional.

Mirror feedback opportunities on project websites: Especially during periods of physical distancing, it is valuable to configure project websites as feedback platforms, not just information portals. Links to digital engagement channels, such as video recordings of past public meetings, project collateral such as presentations, and surveys should be made available here. Feedback opportunities from interactive engagement sessions should be replicated online, such as visual preference surveys, interactive mapping exercises, or free-form comment submissions. Project websites should also show results and summaries from past engagement activities.

Overcoming Access Barriers

Social media should only supplement other forms of communication, since it requires users to have an account to view project information.

Depending on the project audience, **provide information on the project website in languages other than English.**

Design **simple, easy to navigate websites that prioritize the most relevant information first, and are mobile-friendly** so they can be easily viewed on phones by people without access to a computer.

Consult with **Web Content Accessibility Guidelines (WCAG)** to meet various accessibility standards.

Key Takeaways

Bring the right tool(s) to the job

Each project and engagement challenge is unique. As you design your engagement strategy, assess the specific circumstances, audiences, and feedback goals, and employ appropriate solutions.

Be creative, but also pragmatic

There is no shortage of tools, product functions, and ways to replicate in-person experiences online. While we want to get the best out of the online experiences, it is important to keep things uncomplicated. Keeping things simple and consistent, and using tools that you and participants are comfortable with, are important to any meeting organizer and presenter, as well as the audience.

Map out your process

Think of your process as pieces of a puzzle that need to be presented together and make sense to the engaged community. That means assembling your engagement tools in a deliberate way that fit together in a clear, consistent process that can be described in a timeline. Make sure you are communicating where you are in the process, what preceded it, and how the current engagement will inform the next steps of the process. It's especially important when engaging online where people may stumble across your process while engaging on social media.

Attend to the details

The mechanics of an online meeting are different than an in-person meeting. As you become familiar with various video conferencing tools (muting, screen sharing, chat functions, live polling, "hand raising," etc.) it is important to think through how these tools will be used in an engagement session. This is especially true when there are multiple speakers. Map out a clear, internal "run of show" that thinks through the different mechanics of a meeting and delegates team members to handle each one. Assign clear roles to team members before and during meetings to help facilitate the meeting, such as monitoring chat, un-muting participants, running presentations, moderating discussion, and responding to technical issues. Allow participants to join meetings 15 minutes early to give people a chance to resolve technical issues before the actual meeting begins.

Measure what you can

Be sure to track participation from the beginning. It will be important to clearly communicate who you engaged (including how many), your methods for engagement and how you incorporated feedback into your process and plan. Consider any metrics you might want to include when the data is initially collected for sorting and/or analyzing it later (e.g. do you want to collect responses with ZIP code data?) Communicate to participants how feedback will be used and stored.

Recognize the limitations of digital engagement

It is impossible to reach all potential participants all the time, even for engagement outside of the digital world. But switching strategies to those focused on digital tools could exclude more people from the engagement process. As you plan engagements, be conscious of who you are planning with, who might not be able to participate because they do not have the right equipment, software, or internet access? How can you find alternative strategies to reach these people? Are there resources available to help mitigate technological barriers?

Don't forget to make it fun

The most successful engagements are often the ones that, unsurprisingly, are the most engaging. Though it is important to always maintain a level of professionalism and seriousness appropriate for the project, try to design activities that are innovative, novel, and interesting. Remember that community engagement should not be an extractive process, but a collaborative one.

Additional Resources

There is no shortage of directories, articles, or tools/platforms to help with online and distanced engagement. The additional resources listed below are some of the ones we found to be most helpful.

Best Practice Libraries/ Databases

International Association for Public Participation COVID-19 Resources (2020)

In response to the COVID-19 crisis, IAP2, a professional membership organization devoted to advancing best practices in public participation, developed an online resource page that catalogs best practices, tools, resources, and webinars on engagement techniques and tips for physical distancing.

https://www.iap2usa.org/COVID-19-P2-Resources

Participate DB (2009)

Compiled by the Center for Applied Community Engagement, this online catalog tracks tools, services, and case studies for the integration of information and communications technologies (ICT) in digital engagement. This platform was launched in 2009 but has been updated occasionally since its inception.

http://www.participatedb.com/

American Planning Association Engagement Knowledge Base (2020)

Available only to members of the American Planning Association, this collection of best practices, resources, toolkits, webinars, and podcasts covers a wide range of topics aimed at helping planners leverage digital technology in public participation processes.

https://planning.org/knowledgebase/onlineengagement/

Resources for Community Meetings

Vermont League of Cities and Towns Remote Public Meeting Toolkit (2020)

This toolkit is designed to aid Vermont municipalities plan and conduct virtual public meetings. It features a model script for opening legally required meetings (i.e., planning or zoning board meetings), guidance for selecting meeting software, and a checklist for hosting virtual public meetings.

https://www.vlct.org/municipal-assistance/municipal-topics/remote-public-meeting-toolkit

Adaptive Engagement Tool Ideas (2020)

This brief includes tips for adapting meetings of various sizes to remote settings.

https://iap2content.s3-ap-southeast-2.amazonaws.com/marketing/Resources/COVID-19/Adaptive+Engagement+Tool+Ideas+(IAP2A).pdf

How to Run a Great Virtual Meeting (2015)

This article offers tips for etiquette, planning, and agenda-setting when running a virtual meeting. These tips are mainly useful for stakeholder meetings or smaller sessions, but also offers some insights that can be useful for larger public meetings.

https://hbr.org/2015/03/how-to-run-a-great-virtual-meeting

How to find the Best Video Conferencing for You (2020)

Looking at the major video conferencing technologies on the market today, this article compares the features offered by video conferencing services to help users determine which product(s) work best for them.

https://www.usnews.com/360-reviews/video-conferencing

Online Mapping Tools

Public Comment Mapping Tool (2020)

Public Comment is ESRI's crowdsource polling application tool that allows the general public and other interested parties to review geographic information and make comments on it. This tool could be integrated into a project website, allowing for geographic feedback online.

https://solutions.arcgis.com/local-government/help/public-comment/

Online Participatory Mapping for Spatial Planning (2017)

This article describes various online mapping platforms that have been used for online mapping surveys in community engagement processes. The article was published by the Young Academics Network for the Association of European Schools of Planning.

https://aesopyoungacademics.wordpress.com/2017/03/31/online-participatory-mapping-for-spatial-planning/

Public Involvement: Interactive Maps (2019)

This brief video produced by the Federal Highway Administration illustrates some of the ways planning agencies have used online mapping to collect public ideas and feedback.

https://www.youtube.com/watch?v=9o5AnWUbzdY

Online Polls and Texting Services

How to Get Instant Feedback From Your Audience (2017)

This article provides an overview of 10 live polling tools or apps that can be integrated into presentations. It outlines the features of each, allowing for comparison among various platforms.

https://www.presentation-guru.com/how-to-get-instant-feedback-from-your-audience/

10 SMS Survey Best Practices (2019)

This summary of best practice approaches to SMS surveys highlight some of the key features to make SMS surveys effective in reaching people and keeping them engaged.

https://www.business2community.com/marketing/10-sms-survey-best-practices-02179431

Case Study of Text it Forward, SMS based survey tool used in Buffalo Niagara (2014)

This case study describes how UBRI used a text-based survey tool called Textizen to broaden participation opportunities for One Region Forward, the regional sustainability planning initiative launched with partner agencies in 2011.

https://www.codeforamerica.org/blog/2014/06/25/beyond-public-hearings-engaging-in-the-21st-century/

Using Social Media

Public Involvement: Building an Engaged Social Media Following (2019)

This video was produced by the Federal Highway Administration and describes tips and best practices to develop an effective social media strategy for engaging the public virtually, focusing on the metropolitan planning organization of Broward County, Florida.

https://www.youtube.com/watch?v=keE3sfubRRg

10 Facebook Live Tips to Follow Before, During & After Your Broadcast (2017)

When setting up online meetings, simulcasting to Facebook Live can be a useful approach to easily reach people on a site they visit frequently. This article offers tips on how to get the best out of Facebook Live as well as some of its features.

https://sproutsocial.com/insights/facebook-live-tips/

Youth Engagement

Youth Enrichment Activities (2020)

This catalog of youth enrichment activities is a crowdsourced project featuring hundreds of educational activities that keep kids active while working and going to school at home. These activities offer ideas for inspiration when planning youth engagement opportunities.

https://www.enrichmentactivities.org/activities

A Kid's Guide to Building Great Communities: A Manual for Planners and Educators (2010)

This manual developed by the Canadian Institute of Planners provides a host of activities that aid the teaching and learning of urban planning and community development. Activities within this report could be adapted to meet specific community engagement needs and shared with students through their teachers and schools.

https://www.cip-icu.ca/Files/Resources/kidsguide.aspx

Overcoming Access Barriers

Mission: Ignite

This non-profit organization based in Buffalo, NY aims to overcome technological barriers and bridge the digital divide by offering free or low-cost computers to residents and organizations who cannot otherwise afford them.

https://missionignite.org/

Engagement Technology for All (2014)

Developed by Place Matters, this report covers a wide range of best practices to engage underrepresented communities in planning.

https://todresources.org/app/uploads/sites/2/2016/06/PlaceMatters_EngagementTechForAll_Final_20140310.pdf

Equitable Community Engagement During a Global Pandemic and Beyond (2020)

This article offers a range of options to overcome accessibility concerns as well as best practices for making online meetings inclusive and sensitive to the needs of all people.

https://www.smithgroup.com/perspectives/2020/equitable-community-engagement-during-a-global-pandemic-beyond

Spearhead a successful Wi-Fi hot spot lending program with advice from those who led the way, Library Journal (2017)

This article describes Wi-Fi hot spot lending programs, an approach that helps low income communities get access to internet by sharing the resources of public institutions like local libraries.

https://www.libraryjournal.com/?detailStory=hot-spot-techknowledge

COVID-19: How to include marginalized and vulnerable people in risk communication and community engagement (2020)

This guide has a global focus and was led by UN Women and Translators without Borders. It offers details on barriers specific groups may face and resources for effectively communicating to them.

https://reliefweb.int/sites/reliefweb.int/files/resources/COVID-19_CommunityEngagement_130320.pdf