VIRTUAL ENGAGEMENT

TOOLKIT

How might we create good Community Engagement during this Pandemic?

Faced with the challenge of virtually engaging with residents, neighbors and community members in the wake of the Coronavirus Pandemic, we created this Virtual Engagment Toolkit to share tips, techniques and best practices for pandemic-safe community stakeholder engagement exercises to help non-profit community developers, community organizers, artists, architects, and urban planners.

A RESOUCE CO-CREATED BY

ENTERPRISE **ROSE** FELOWSHIP + CO**Everything**

ENTERPRISE ROSE FELLOWS

The innovative model of the Enterprise Rose Fellowship partners architects, landscape architects, and community-engaged artists with local community development organizations to facilitate an inclusive approach that results in sustainable, healthy, and affordable communities.

COEVERYTHING

A cooperative architecture and real estate development consulting firm, CoEverything works collaboratively with communities, organizations and entrepreneurs to design and develop more cooperative and sustainable buildings, businesses, and projects.

GETTING STARTED

With virtual engagement becoming the new normal, what can we do to make sure that we create a good and meaningful experience for those involved?

Good community engagement is *fun, accessible, and inclusive.* Engaging virtual experiences are *interactive, simple, and easy-to-follow.* Before we begin brainstorming the type of virtual engagement exercise, we always like to start with some framing.

As a best practice, establish a framework around your engagement by asking yourself:

- [ ] **WHO ARE WE TRYING TO ENGAGE?**
- [ ] **WHAT DO WE NEED TO DO TO REACH THEM?**
- [ ] **WHY ARE WE ENGAGING?**

We have provided worksheets with a Framing Exercise and a series of questions that can help you and your team define the Who, What and Why for your engagement.

1. WHO FRAMING EXERCISE

Answer the questions on this worksheet when thinking about
WHO ARE WE TRYING TO ENGAGE?

○ **Who is not in the room?**

....
....
....

○ **What support do people need to attend?**

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....
....

○ **Are there trusted community members we could ask to do outreach and compensate them for that work?**

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....
....

○ **What partners within/adjacent to our organization could we leverage for connections?**

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....
....

○ **Have we or our partners built trust in the real world with community members before asking for help with virtual outreach?**

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....
....

2. WHAT FRAMING EXERCISE

Answer the questions on this worksheet when thinking about
WHAT WE WILL NEED TO DO TO REACH OUR AUDIENCE?

○ **What can we do to center our outreach on community impact?**

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....
....

○ **Many funders have pre-existing requirements for outreach, how can we creatively expand beyond those requirements?**

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....

○ **Do we want to use asynchronous and/or syncronous engagement to reach our community?**

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....
....

○ **What languages are we using to reach our community? Can we make it simpler or more accessible?**

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....
....

○ **What risks could we be taking to reach new networks of people that we haven't reached in the past?**

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....
....

3. WHY FRAMING EXERCISE

Answer the questions on this worksheet when thinking about
WHY ARE WE ENGAGING?

○ **Have you made community engagement a default practice in your organization? Why or why not?**

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....
....

○ **How will this engagement enrich the design or development?**

....
....
....

○ **What could we be doing to put residents and community members in the driver's seat?**

....
....
....

○ **How does the purpose of this commnity engagment reflect the mission and vision of our organization?**

....
....
....

○ **What can we do to make our virtual engagement based on cultivating long term relationships?**

....
....
....

VIRTUAL ENGAGEMENT EXERCISE IDEAS

Now that you have framed the Who, What and Why of your virtual engagement, it's time to choose an idea or a theme. In this section, we will provide some templates and questions to help you develop your virtual engagement exercise. All you have to do is:

☐ **CHOOSE AN IDEA OR THEME**

☐ **DEVELOP AN EXERCISE AROUND IT**

First, brainstorm some ideas - we like to use the "hot pen" method. Set a timer for five minutes, grab a pen and paper or sticky notes, and write down as many ideas for virtual engagment exercises as you can.

If you're feeling stuck, we've included our "Idea Explosion" - a list of 50+ Virtual Engagement Exercises that are *fun, accessible, and inclusive.*

After you have chosen an idea, it's time to develop it into a plan. Make sure that is *interactive, simple, and easy-to-follow.* Use the template in this section to plan your virtual engagement exercise, whether it is custom to you, or chosen from the list of examples. We've included two completed Example templates for your reference.
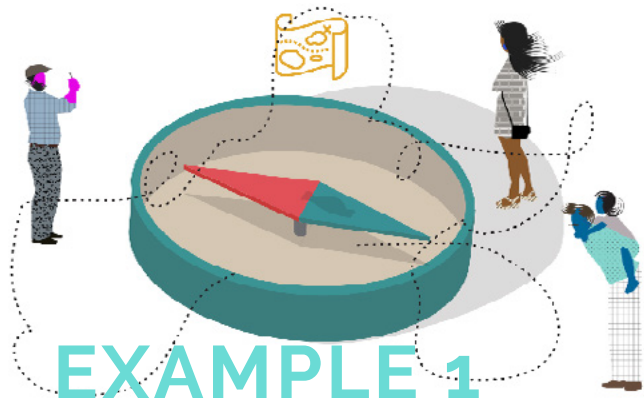
EXAMPLE 1

SCAVENGE & SKETCH ADVENTURE

Offer a playful/creative way to experience & explore space

STEP 1

Choose a geographic area of your neighborhood that you would like community members to experience & explore. Outline the boundary. Create a sequential series of puzzles/riddles, and prompts for sketching to form the outline of your scavenger hunt.

STEP 2

Send an announcement of the Scavenge & Sketch Adventure with date, "submit by" time and submission rules of the game to the community. Digital or analog outreach will work!

STEP 3

Host a live video introducing the organization and the event. Explain why we are doing this activity.

STEP 4

Organizers facilitate a good time for all by collecting submissions & providing tech support along the way, or by offering clues to teams who are stuck on a clue or puzzle.

STEP 5

Host a live video to close out the event, review everyone sketches and submissions, thank everyone for participating and announce a winnder (if any!) Give details or a link to where the shared sketches will be posted virtually or in real life.

DIFFICULTY

Check one box:

☐ **EASY**　　☒ **MEDIUM**　　☐ **HARD**

LOGISTICS

How long is this execise? ~2 hours to 2 days

How many participants? unlimited teams!

PREP WORK

List of things to prepare in advance:

2 weeks of planning & back-end prep

Costume/theme prep, organizers will plan

locations/puzzles/prompts, create a map/

guidelines, prep for live events & setup sharing of

sketches. Create an outreach plan.

VIRTUAL GARDEN & VEGGIE TOURS

EXAMPLE 2

Have fun learning about community gardens while your host is dressed like a vegetable!

STEP 1
Choose a community garden as your site, including houses with gardens in the neighborhoods, urban farms, or all of the above! Plan your route if you are touring multiple gardens.

STEP 2
Get a lively host who knows about the gardens to dress up as a vegetable :)

STEP 3
Set up an Instagram channel or Facebook livestream on phone. While livestreaming the event...

STEP 4
Take community members on a tour of the garden, while answering questiosns about food access or questions from the virtual audience on the theme of growing local veggies.

STEP 5
Post the video across social media channels, you can do this regularly in short episodes or ask another person to volunteer to show off their garden plot!

DIFFICULTY
Check one box:

☐ **EASY**   ☐ **MEDIUM**   ☒ **HARD**

LOGISTICS
How long is this execise? 1 hour max event

How many participants? unlimited

PREP WORK
List of things to prepare in advance:

lots of planning, coordination, the accounts, etc.,

need to create awareness about the event. Scoping

gardens, outreach, social media accounts, training

tour leaders/filmer how to use tech, costumes,

research for educational components, props.

IDEA EXPLOSION

50+ IDEAS FOR VIRTUAL ENGAGEMENT

1. Professional development workshops
2. Follow-along craft activities
3. Prayer groups
4. Follow-along dance instruction
5. Meditation
6. Online games
7. Book clubs
8. Virtual "walks"
9. Venting circles
10. Collaborative art / creative exercise
11. Exercise or movement class
12. Interactive live music performance with requests from viewers - like virtual cover band
13. Mindfulness / calming techniques / meditation
14. Recipe swap / collective cooking
15. Zoom karaoke fundraiser - pay to sing a song on zoom.
16. Grieving circles - nonjudgmental small group processing circles
17. Cooking class demo with kits sent to people beforehand
18. Community roast
19. Online game night - mahjong
20. Mystery dinner party
21. Virtual scavenger hunt
22. Escape the room zoom room
23. Email pen pals, cross generational
24. Virtual collaborative collage to explore ideas about moo
25. Receiving ideas & feedback through posts on instagram by using a hashtag
26. Virtual watch "parties' of educational videos or sweet things happening in community
27. Posting pics / images of homes/places to common board/ forum
28. Mailer - draw yo dream home (vote then win) + some kinda virtual share
29. Street clean-up, email/text residents to partake instead of flyering
30. Photo-voice: have residents submit photos of what they like about their neighborhood for predevelopment
31. Mural designing / collaboration
32. Utilizing social media platforms for events
33. Facebook live dance party
34. Create a website for asynchronous interactive exercises
35. Fun video campaign (filmed with community live) shared virtually
36. Idea voting: lots of ideas voting up and down quickly.
37. Non-video check-up calls
38. Phone-tree activism: fill out the census or get people to register to vote
39. Message in a bottle voicemails/ stories between neighbors? Or from organization to residents?
40. Exercise or movement class
41. Meditative exercises (nonintensive). Like some forms of yoga or martial arts
42. Scavenger hunt! To get people moving
43. Going on virtual walks with people and sharing what you see
44. Office hours - people with needs can drop in with issues re: covid19
45. Assistance with navigating public / community services for those needing support- especially w/ public agencies
46. Speed dating 1:1 meet your neighbors - find what you have in common
47. A collective album/music video/ advertisment to then share
48. Virtual open mic with storytelling themes
49. Pre-recorded story telling event with q&a
50. Connect to a lived experience around housing, a fave or silly memory of a neighbor or living in community, description of dream home/living situation
51. Space for people to express their feelings and experiences through covid
52. Post office board
53. Post a pic of website for engagement / rip off tabs and include mention of incentive...
54. A virtual post office board with "cards" for each flyer, categories for types of flyers to be inclusive for non tech-savvy people
55. A posted questionnaire and submission box that then the organizer documents digitally to share more broadly.
56. Virtual community garden-plan
57. Virtually, schedule and have participants take videos and show others of their own gardens or gardens in town they like / find and share images found from internet to contribute to the virtual planning session
58. Sketch slam. Submit drawings/art/ list of things
59. Digital mural painting - local artist to lead, collaborate through layering, could be paint by numbers, or could be collage-style

VIRTUAL ENGAGEMENT EXERCISES
- A TEMPLATE -

Descriptive name
of your exercise: ....

Purpose   of
the exercise: ....

STEP 1

STEP 2

STEP 3

STEP 4

STEP 5

DIFFICULTY

Check one box:

☐ **EASY**   ☐ **MEDIUM**   ☐ **HARD**

LOGISTICS

How long is
this execise? ....

How many
participants? ....

PREP WORK

List of things to prepare in advance:

....

....

....

....

....

TECHNIQUES, BEST PRACTICES & TIPS

We've all been there - the techniques that work in real life for community engagement don't all translate to a virtual space. Here is a breakdown of some of our favorite techniques for virtual engagement with a variety of audiences.

This section includes:

- ☐ **VIRTUAL ENGAGEMENT TECHNIQUES**
- ☐ **BEST PRACTICES FOR BREAKOUT GROUPS**
- ☐ **TIPS FOR CLOSING**
- ☐ **TOOLS OF ENGAGEMENT**

Keep in mind that these ideas are not one-size-fits-all; choose the techniques that will work best with your community.

VIRTUAL ENGAGEMENT TECHNIQUES

From invitation to close-out, there are many techniques you can use to keep your audience engaged - via Youtube, Hangouts, IG Live, or Zoom. Other digital tools will be covered specifically at the end of this section.
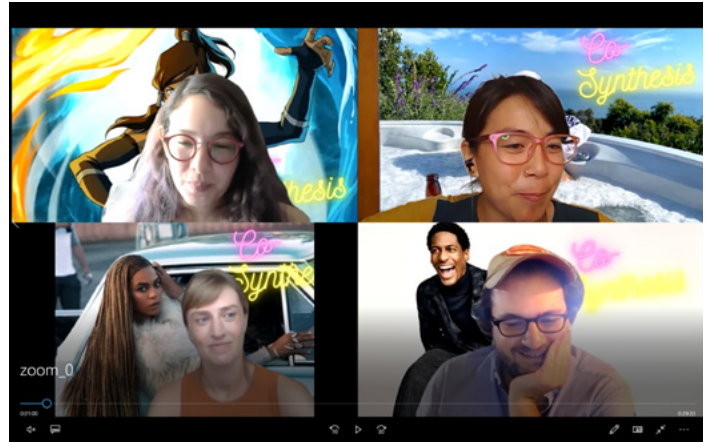
SET THE TONE

Design your virtual space to reflect the tone of the event and start that early with the graphic style and language communicated in the invitation. Consider:

- [ ] **FUN/RELEVANT VIRTUAL BACKGROUNDS**
- [ ] **SNACK BREAKS**
- [ ] **MUSIC/VIDEOS**
- [ ] **COLLABORATIVE SPOTIFY PLAYLISTS**
- [ ] **SNAP CAMERA / VIDEO FILTERS**
- [ ] **MAILING OR DROPPING OFF KITS/PROPS/MEALS ETC. AHEAD OF YOUR EVENT**

DO A TECH CHECK

Ask all your all facilitators, panelists, presenter or team members to log on to the virtual event platform 30 minutes ahead of time to trouble shoot and review roles for the event.

- [ ] **BANDWIDTH CHECK: VIDEO ON OR OFF?**
- [ ] **MIC CHECK: FEEDBACK, VOLUME, SOUND QUALITY**
- [ ] **VIDEO CHECK: IS YOUR FACE WELL-LIT? IS YOUR BACKGROUND DISTRACTING?**
- [ ] **AGENDA OVERVIEW**
- [ ] **EXPLAIN ROLES DURING EVENT**

ASSIGN TEAM ROLES

For staff or volunteers running your virtual event, make sure everyone has clear and simple team roles. No one wants to feel confused on the day-of your event! Consider the following roles:

- ☐ **CHAT GREETER/WELCOME PERSON**
- ☐ **FACILITATOR**
- ☐ **MODERATOR/TECH SUPPORT**
- ☐ **"REGISTRATION DESK" LET PEOPLE IN FROM WAITING ROOM**
- ☐ **PERSON FROM THE HOST ORGANIZATION TO ANSWER QS IN THE CHAT**
- ☐ **TIMEKEEPER**

USE VIRTUAL HOUSE RULES

Depending on your type of event and the number of people attending, you may invite your participants to use a different set of "House Rules" at the beginning of the event. Participants want to know how to communicate: is it via comments on facebook live? Chat box? Open mic? You may include community agreements as well (like "Step Up/Step Up"). Consider:

- ☐ **MIC ON OR OFF**
- ☐ **VIDEO ON OR OFF**
- ☐ **HOW TO COMMUNICATE - CHAT, TEXT, Q&A BOX, COMMENTS**
- ☐ **INCLUDE PRONOUNS IN NAME**
- ☐ **VIRTUAL OR REAL HAND SIGNALS - THUMBS UP/ DOWN, CLAP, TAKE STACK**
- ☐ **ONE PERSON TALKING AT A TIME**

LEARN BY DOING

Instead of defaulting to a Presenter - Observer mindset, try activities that initiate a "learn by doing" mentality for your virtual engagements. Consider:

- [ ] **SYNCHRONOUS LEARN BY DOING: LIVE STREAM DEMOS**

- [ ] **ASYNCHRONOUS LEARN BY DOING: RECORDED DEMOS, AUDIENCE TO UPLOAD THEIR RESULTS**

- [ ] **ROLE PLAYING IN FACILIATED BREAKOUT GROUPS**

- [ ] **SPRINT/TIMEBOX - CHOOSE 10X5 MINUTES ACTIVITES TO BREAK THE LEARNING INTO SMALLER SEGMENTS**

STORYTELLING

Storytelling is a great way to capivate your audience and to move them from inactive observer to steward and participant in your virtual event. In 60 seconds or less, you might share shocking or provocative statistics, anecdotes, or analogies that dramatize the story or topic of your event. Consider:

- [ ] **TELLING THE ORIGIN STORY OF THE TOPIC AT HAND**

- [ ] **USING IMAGES OR VIDEOS TO BRING THE STORY TO LIFE**

- [ ] **TRY A LOW-STAKES POLL TO OUTLINE FACTS OF THE STORY AND TO KEEP THE AUDIENCE PARTICIPATING AND ENGAGED**

- [ ] **TAKE 60 SECONDS TO USE STORYTELLING TO FRAME "WHY WE ARE ENGAGING" IN THIS VIRTUAL SPACE**

- [ ] **MIXING TALKING POINTS AND STORIES TO KEEP PARTICIPANTS ENGAGED**

Agenda for Today

- Group Warm Up Exercise (5m)
- Breakout Groups
    - Idea Explosion - Brainstorm (30m)
    - Virtual Engagement Exercise Mockups (25m)
- Closing Reflection (5m)

Note: Get ready for the Technology Buffet!

PREP AN AGENDA/SCHEDULE

Give a schedule or agenda overview to people ahead of time so they know what to expect and how long they will be in the "observer" role vs. the "participant" role. Consider:

☐ **SHARING DETAILS FOR "PLANNER" PERSONALITIES WHO DON'T WANT TO BE CAUGHT OFF GUARD**

☐ **A BROAD SCHEDULE WILL ALLOW PEOPLE TO SHOW UP FOR PARTS OF THE EVENT THAT MATTER TO THEM**

☐ **USING A FLEXIBLE AGENDA TO EDIT/ADJUST BASED ON WHO SHOWS UP TO YOUR EVENT**

DON'T FORGET TO USE CHAT!

Chat (in Zoom, Slack, or Text, etc.) works well to give people a voice, works well for introverts who prefer to stay out of the video spotlight, and allows the group to share many voices without complications of video. Depending on the size of your group or audience, it could be a great option as the main form of open communication. Consider:

☐ **ASKING A WARM-UP PROMPT TO INTRODUCE YOURSELVES IN THE CHAT**

☐ **GREETING AND THANKING PEOPLE FOR SHOWING UP OVER CHAT**

☐ **DROPPING BIT.LY LINKS TO RESOURCES IN THE CHAT**

☐ **USE CHAT TO EXPLAIN ACRONYMS OR DEFINE JARGON USED BY SPEAKERS OR PARTICIPANTS**

☐ **USE CHAT OR TEXTING AS A WORK-AROUND IF LAPTOPS ARE UNAVAILABLE.**

☐ **USE EMOJIS IN THE CHAT TO KEEP IT FUN** ❤️👍🏻👍🏼👍🏾👍🏽👀

BEST PRACTICES FOR BREAKOUT GROUPS

Use breakout groups to create accountability. In large virtual spaces, voices are at risk of becoming lost. Here are some options that can keep your breakout groups accessible and engaging.

OPEN FACILITATED GROUPS

Whenever available, open facilitated small groups make it easier for folks to connect to one another without being overwhelmed. "Open" refers to sharing information across all groups - this can be achieved via a gallery walk, or a virtual tool where all responses can be seen collectively and immediately. Choose the size of the virtual breakout group based on the amount of time you have for the exercise and share-backs. Consider:

☐ **HOW TO SHARE RESULTS BETWEEN YOUR GROUPS**

☐ **DOING A DRY-RUN WITH YOUR FACILITATORS**

☐ **DEMONSTRATING THE EXERCISE TO THE WHOLE GROUP FIRST**

☐ **FACILITATOR AS SCRIBE FOR ANYONE WITH TECH ACCESSIBILITY ISSUES**

☐ **MAXIMUM BREAKOUT GROUP SIZE OF 6-8**

☐ **TURNING ON AUDIO/VIDEO**

☐ **ALLOWING ENOUGH TIME FOR PARTICIPATION BASED ON NUMBER OF PEOPLE IN THE BREAKOUT**

SELF-MODERATED GROUPS

To accommodate unlimited numbers of participants, try using self-moderated virtual breakout groups. This method requires some extra planning and practice but can be very fun with the right group and the right exercises. Consider:

☐ **MAXIMUM GROUPS OF 3-4**

☐ **1 TIMEKEEPER PER GROUP**

☐ **HOW TO RECORD RESPONSES**

☐ **1 SCRIBE PER GROUP: 1 PERSON WHO CAN SCREEN SHARE WITH LAPTOP**

☐ **USE "ASK FOR HELP" BUTTON TO CONTACT THE HOST IN THE MAIN ROOM IF USING ZOOM**

☐ **TEAM OF CO-HOSTS AS "BACKUP SCRIBES" IN THE MAIN ROOM CAN JOIN A GROUP WHO NEEDS HELP**

☐ **DEMONSTRATING THE EXERCISE TO THE WHOLE GROUP FIRST**

☐ **SELF-MODERATED MEANS LESS STAFF NEEDED, SCALABLE TO THE EVENT**
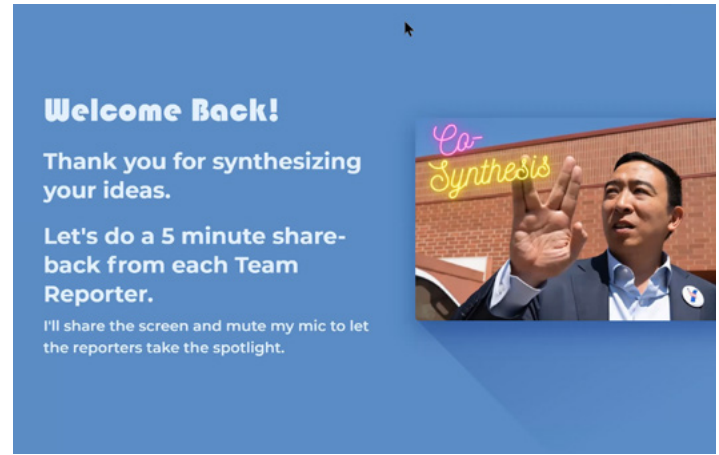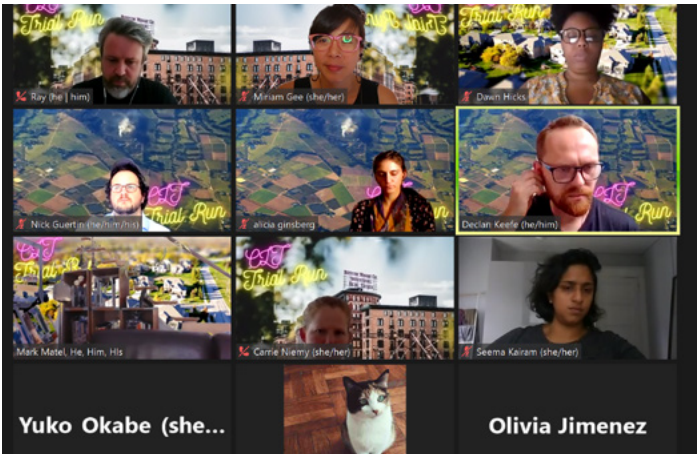
CLOSED FACILITATED GROUPS

"Closed" refers to privacy between groups - if the intent is to share the information with the larger group, you may want to pair a closed breakout group with a "Reporter Role." This will work if you have a finite number of RSVPs. Consider:

- ☐ **1 LIVE COLLABORATIVE DOCUMENT PER BREAKOUT**

- ☐ **LIMITING TO 4-6 PARTICIPANTS FOR LIVE EDITING**

- ☐ **CLEAR TIME LIMITS FOR EACH STEP**

- ☐ **FACILITATOR AS SCRIBE FOR ANYONE WITH TECH ACCESSIBILITY ISSUES**

- ☐ **DOING A DRY-RUN WITH FACILITATORS**

- ☐ **TESTING DOCUMENT ACCESSIBILITY SETTINGS AHEAD OF THE EVENT**

- ☐ **CREATING A SUMMARY SLIDE / PAGE WITH FINITE NUMBER OF BULLET POINTS**

REPORTER ROLE

Depending on the size of you group, reporting back after breakout groups in a virtual space can be time-consuming, painful, or chaotic. To avoid getting "hijacked" by those with loud voices, assign a "Reporter" role to each group to report back. The key is to limit the amount of air time and to agree ahead of time on who and how the report will be made. Consider:

- ☐ **HOST TO SHARE THE SCREEN TO THE SUMMARY SLIDE / PAGE FOR EACH REPORTER TO EASE TRANSITIONS**

- ☐ **HOST CALLS ON REPORTER ONE AT AT TIME, ASKING THEM TO UNMUTE THEMSELVES AND STARTS A TIME CLOCK ON THE SHARED SCREEN**

- ☐ **HOST TO END ON TIME REGARDLESS IF ALL GROUPS HAVE SHARED**

- ☐ **ENCOURAGING Q&A VIA CHAT DURING THE REPORT BACK TO LIMIT CROSS-TALK**

TIPS FOR CLOSING

Make sure to respect the end time of your event and be ready to close it down if you have to! Save time at the end for reflection / closing / check out and thank everyone for participating.
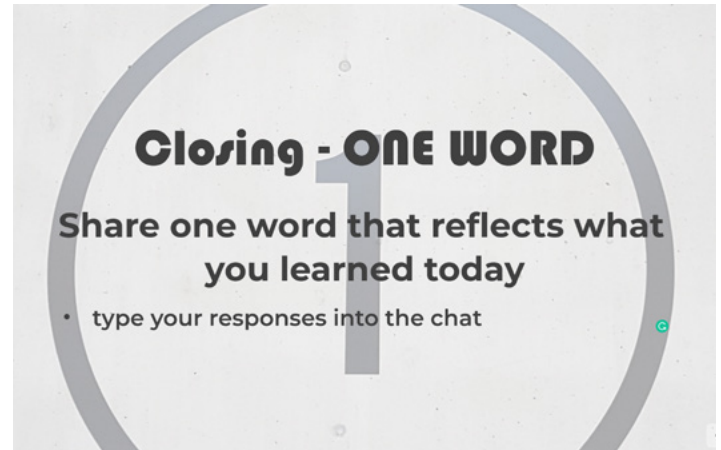
FACILITATE YOUR Q&A

Well-facilitated Q&A sessions can be the best. Poorly-facilitated open mic Q&A can result in awkward silence, mic hijacking, or participants virtually exiting your space ASAP. Consider:

- [ ] **A "PARKING LOT" OR "BIKE RACK" ATTENDEE TO RECORD ALL QS THROUGHOUT THE SESSION FROM CHAT**

- [ ] **LEAN COFFEE DISCUSSION: USING A KANBAN BOARD, THE GROUP TYPES ALL QS INTO THE CHAT, THEN VOTE ON WHICH TO DISCUSS FOR 5 MINUTES AT A TIME**

- [ ] **TAKE STACK: RAISE A FINGER IF YOU'D LIKE TO ASK A Q. THE NEXT PERSON RAISES TWO FINGERS UP, AND SO ON. HOST CALLS ON PEOPLE FOR QS IN ORDER**

TAKE TIME TO RECONVENE

Use a reconvening exercise to ease the transition from the breakout group back to the main room. Consider:

- [ ] **LIVE POLLING TOOLS WITH OPEN RESPONSES OR MULTIPLE CHOICE ANSWERS**

- [ ] **"TEMPERATURE CHECK" / THUMBS UP POLL**

- [ ] **TAKING A DEEP BREATH TOGETHER**

- [ ] **BRIEF BODY MOVEMENT EXERCISE**

- [ ] **FOLLOW-UP SURVEY OVER EMAIL**

- [ ] **SILENT REFLECTION - THEN OPEN MIC AND 1-2 VOLUNTARY SHARES**

- [ ] **ONE WORD/ONE THING YOU LEARNED - SHARE IN CHAT**

TOOLS OF ENGAGEMENT

And finally, in case you were looking for a technology buffet of virtual engagement tools, we've saved the best for last. Depending on your audience's familiarity with technology you can select whatever tools you think will work for your engagement. We provided a spectrum of options. Some are ubiquitous, though we have listed specific traits that can make them extra useful for virtual engagement events.

This section includes:

- ☐ **HIGHER TECH TOOLS**
- ☐ **LOWER TECH TOOLS**

We have live tested the majority of these tools and found that they can be applied to a variety of scenarios. Click on the links below to go to a product's website to learn more. And, of course - don't feel obligated to use technology in your pandemic-safe engagements - only use these tools if it facilitates interactivity and communication. Keep in mind that user logins, access to laptops instead of smart phones, and user bandwidth can act as barriers to accessibility for some audiences.

HIGHER TECH TOOLS

Click on the links below to explore these higher tech tools.

MENTIMETER
interactive presentation polling, word cloud, open comments, anonymous
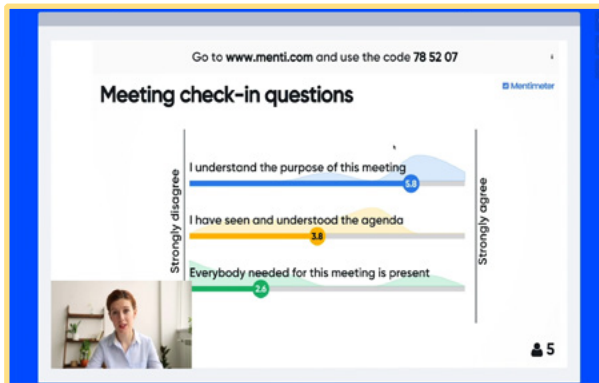
GOOGLE DOCS
commenting, in real time editing, no login required, a/synchronous
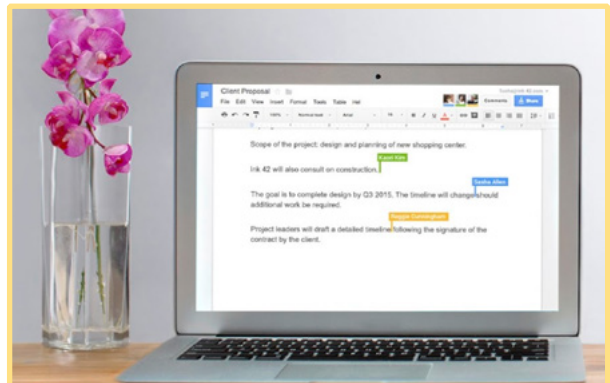
GOOGLE SLIDES
in real time editing, no login required, easy UI, can lock background images
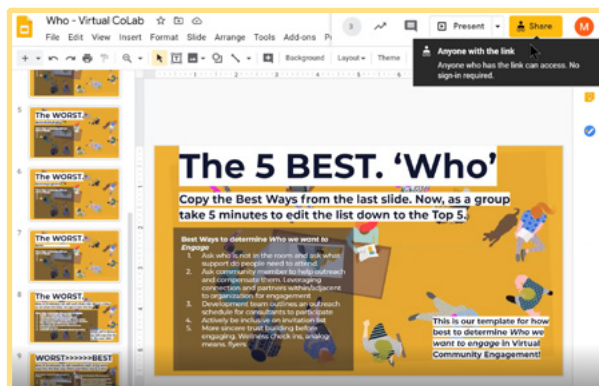
CODA
login or anonymous, high tech, co-creation tool, voting, timers, comments
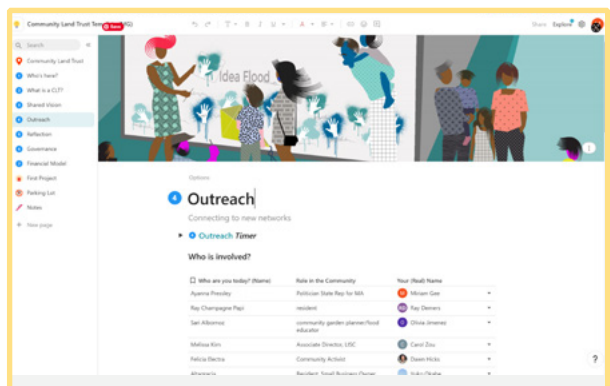
MIRO
login required, high tech, collaborative white board, stickies, icons, comments
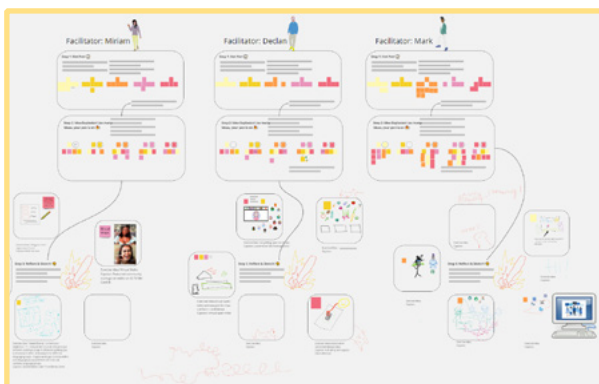
SURVEY LEGEND
no login required,multilingual unlimited number of submissions

LOWER TECH TOOLS

Check out some ideas below for lower to no-tech tools.

BIT.LY

create memorable short event links for posters/flyers/text or links to resources during your virtual engagement
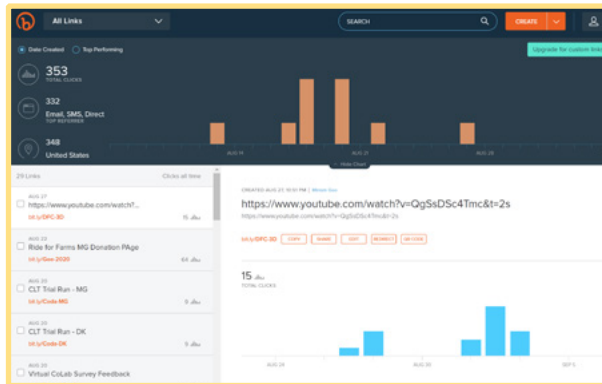
DIGITAL & PRINT

create digital activites that also work in person, print/mail, or over the phone that maintain social distancing


PASTEAPP

semi-custom designed slide decks, live comments, in real time editing

HUSTLE

peer to peer text campaigns, requires phone numbes, non internet

EVENTBRITE

collect RSVPs, emails, advertise event to the public, familiar UI, login required

YOUTUBE

asynchronous, record & upload videos for automatic captions in 62 languages