



## STEP BY STEP GUIDE

# Virtual Participation

Amy Wilson  
Mariah Lichtenstern

New technological tools allow residents to attend and participate in local government meetings without leaving their homes, which adds convenience and improves engagement and trust. Such tools allow residents to become more informed, and engaging people through diverse channels removes barriers to participate in the civic process. Enhancing online public participation has many benefits for constituents, as they will perceive a government to be:

- ▶ **More legitimate:** Transparency in the political process shows that you have arrived at decisions fairly, through an open and equitable process that reflects the public interest.
- ▶ **Consensus-based:** Online engagement helps residents collaborate and creates a shared view of the problem and solution as participants' attitudes and opinions transform.
- ▶ **Trustworthy:** Knowing there is a dialogue creates greater support for implementation and can set the course for future engagement.

The need for virtual participation has increased due to the pandemic, and it is more important than ever for the government to provide information that residents need. This guide will help city governments envision how to create a stellar, holistic experience by using technologies to increase engagement with residents. We also include a checklist for individual digital engagements.

*Thank you to our project mentor: Mai-Ling Garcia, Current Head of Digital Strategy & Engagement, City of San Francisco; Former Digital Engagement Officer, City of Oakland, CA*

## Before You Begin

A good starting point for increasing virtual participation requires taking a few moments to think through the experience and feedback you are hoping to collect from residents (which we also call a “user” or “customer”). There are four main areas you need to focus on before you begin connecting with your users:

- ▶ **User Experience:** Put yourself in the shoes of the people you want to reach. Think about who they are and what kinds of experiences you want them to have.
  - ▶ What are your goals? Do you want the user to think or do something with what you’re creating?
  - ▶ What are the user’s pain points that they have and gains that they desire in their daily lives that this service, product, or program addresses?
  - ▶ How do you want them to feel while using it?
  - ▶ What could keep them coming back?
- ▶ **Points of Engagement:** Based on the answer to #1, pinpoint areas that you believe could benefit the most from engagement from your users.
  - ▶ What are the best places and times to secure feedback?
  - ▶ Do you have synchronous conversations (live conversations between the citizen and an agency), or asynchronous conversations (where you read and respond to the conversation at a later time)?
  - ▶ How will you solicit and collect input when creating a policy or holding a public meeting? How will you collect and respond to unsolicited input?
  - ▶ What do you want users to do before, during, and after the experience?
  - ▶ How will you collect feedback and other data from users?
- ▶ **Engagement Lifecycle:** Determine the process you will follow to receive feedback and turn it into action.
  - ▶ What will you do when you get feedback?
  - ▶ Who will make sure submitted questions and/or comments are addressed?
  - ▶ What process will you follow to improve upon the experience?

- ▶ **Select and Prepare the Technology:** Once you have a firm grasp of the experience you want to create, explore what technological tools could help you achieve your goals. Such technology generally falls in three categories: virtual participation, livestreaming, and ongoing engagement.
  - ▶ **Virtual Participation Software:** These platforms allow you to have real-time interaction with constituents through phone or video. You can strictly limit interactive features or give more power to the residents to participate. Examples of such platforms include Zoom, GoTo Webinar, and/or WebEx. Note that there are also white board options in Zoom, which allow you to draw, write, or add pictures to engage with audiences.
  - ▶ **Social media streaming:** Social media platforms such as Facebook Live, Twitter, and/or Instagram can be used to upload a video “stream” so that people can participate in real-time or with a few seconds delay. Keep in mind that these platforms typically default to allow live commenting and emoji reactions such as a “like” or “love,” which can be turned off.
  - ▶ **External Products to Enhance the Virtual Experience:**
    - ▶ **Virtual White Board:** Online white boards are similar to real-life white boards, as they allow you to add text, diagrams, and pictures, and also organize sticky notes around common themes. You can use a virtual white board when presenting to show key points and collect thoughts, or open it up to allow other people to add their input. You can control the amount of access users have to edit the white board. Popular whiteboard platforms include Mural, Miro, and Stormboard. Plectica is also a feature-rich free option.
    - ▶ **Polling:** Polls provide an immediate method for learning more about audience members’ preferences, engaging them during a presentation, or getting feedback about services or policy priorities. Polling is usually done in real time or over a short period of time, and the results are reported out transparently for maximum effect. Polling can be done via a mobile-friendly website or mobile application, or via text; polling features are also embedded in social media tools such as Facebook, Twitter, and Instagram (with limited functionality). Common websites for polling include Polltab (which requires users to prove their identity before voting); Poll Everywhere (which is especially good for polling during presentations); and Voca (which is useful for polling by local governments to get public thoughts on specific topics).

## Checklist

### DESIGNING INDIVIDUAL PUBLIC ENGAGEMENT EXPERIENCES

As you develop a strategy for virtual meetings, think deeply about how you will engage those who are attending. This is your chance to design the kind of experience you want them to have. Here are some considerations when designing a plan for each session:

#### Preparing the Session

- ▶ **Technologies:** What technologies will you use? Are you going to use video, phone, and/or text to participate? Are you using other media or technology tools to enhance the experience?
- ▶ **Engagement:** How will you engage users during the experience? How is the experience different online than in person?
  - ▶ If using video or phone, will you require users to raise their hands to speak? Will you use polls, the chat function, and muting and unmuting?
  - ▶ How often do you want to engage participants who are online? Schedule prompts to ask remote participants for input.
- ▶ **Breakouts:** Will there be breakout rooms? Will they be broken down by location, subject area, district, or another option? If so, what kind of prompts will you provide to the breakouts and how will you make sure that the conversation flows? For example, you can place a discussion leader in each room or, with a well-written prompt, have teams facilitate the conversation themselves. Breakout sessions can last from five minutes to multiple hours, depending on the need and design of the session.
- ▶ **Materials to Distribute:** Are there items that need to be distributed ahead of time? Ensure they are sent out in advance and are clearly marked with page numbers and sections.
- ▶ **Capturing Notes:** What will you do with the information and data once it is received? How will it be incorporated?

**Before/During the Session**

- ▶ Create a buffer of time at the beginning to check connections and leave time at the end of the session in case the meeting runs over.
- ▶ Test sound and video quality in advance to make sure it is working correctly and you can hear and see attendees.
- ▶ Turn off all non-meeting windows and distractions, including screens you and others may be sharing.
- ▶ Provide a backup dial-in number in the meeting invite or before the meeting.
- ▶ Choose clothing and a background that is not distracting.
- ▶ Invite participants to text or add questions in the comments/chat window if they are not allowed to speak.
- ▶ Assign online facilitators:
  - ▶ Designate a person to troubleshoot/monitor the meeting, and share this person's information with participants to help with troubleshooting.
  - ▶ Assign a participant-focused facilitator who integrates remote participants into the conversation.
- ▶ Call to Action: Are you asking attendees to take specific actions? What are the action(s) you want them to take? Be explicit about next steps.

## Closing the Loop: After the Meeting

Having a way to improve the experience and fostering dialogue with users is a key part of building trust-based relationships. After the virtual session, your goal should be to address any questions or concerns and put feedback into action. You want residents to feel they have agency and that their input is integrated into the government decision-making process.

- ▶ **Collect and Analyze Data:** After each session, collect all the data from participants. Reach out to people who have shared information with you to collect their thoughts and input. Analyze the feedback to see what insights you get from the data (quantitative and qualitative). Start identifying key themes that emerge and collect that information for the next step. See what people are saying and how they feel about a specific discussion by looking at poll results and the comments: are they positive, neutral, or negative?
- ▶ **Filter on Policy Areas and/or Districts; Forward Onward:** Next, filter the data and send appropriate feedback to the right committees and/or government officials who may be interested in an idea. For instance, does the public want you to change or add new buttons on the website? If so, the web team should be informed. Identify other options that your customers are needing/wanting and forward those to individuals in charge of implementation. Identify the improvements you can make and prioritize those that provide the most benefits to users.
- ▶ **Complete a Hotwash:** After each virtual session, gather those who facilitated and supported the meeting and conduct a “hotwash”: ask for feedback from team members to improve the experience for the next time. Here are two different ways to do a quick hotwash:
  - ▶ **Start, Stop, Continue:** Ask, what should we start doing? What should we stop doing? And finally, what should we continue to do?
  - ▶ **Plus/Delta/Solution:** Ask, what were the pluses of the experience? What needs to change (the delta)? And what are some corresponding solutions to those deltas? Also ask: what lingering questions do we have?
- ▶ **Communicate Out:** When public comments are forwarded to the appropriate committees, policy representatives, or councilmembers, the communications team should communicate to participants that their feedback has moved onto the next step. Think: How are we communicating to our customers and making sure their feedback and voices are valued and incorporated into our government?

## USER DATA PRIVACY AND SECURITY CONSIDERATIONS

By enabling virtual participation in meetings, you might be collecting “personal identifiable information” or PII. Such data contains important information such as physical addresses, email addresses, and/or phone numbers that, as a government agency/organization, must be responsibly protected.

Here are some considerations that you and your security team will want to take when handling this information, drawing from recommendations from the [Forbes Technology Council](#):

- ▶ Clarify where data lives and how it will be protected.
  - ▶ Be transparent and proactively update customers about your practices. Be clear about what data you are (or are not) collecting and storing.
  - ▶ Describe the measures you have in place to make sure the PII is securely stored.
- ▶ Implement multi-factor authentication and anonymize data.
  - ▶ Multi-factor authentication provides a way for a person to log on to a website using multiple methods to add an extra layer of security. These authentication methods might pair a password with methods such as requiring users to respond to an email, enter a code sent to a phone via text message, or log in through another technology device.
  - ▶ Anonymize data to protect the privacy of your users. This involves either encrypting or removing personally identifiable information from your data.
- ▶ Provide users with the information and options they are looking for.
  - ▶ Allow users to opt out of sharing personal information.
  - ▶ Provide end-to-end encryption.
  - ▶ Create a Frequently Asked Questions (FAQs) page on your website that addresses security and privacy concerns.
- ▶ Speak plainly so customers can understand your security process.
  - ▶ Try not to use jargon to describe a process or program; instead, describe it as if an eighth-grader could read it, using short, simple phrases.
  - ▶ Allow users to contact you with questions or concerns.



**ASPEN TECH  
POLICY HUB**

People Powered Policy: Improving Digital Engagement  
and Policymaking in the City of Oakland

**Step by Step Guide**