



# Stakeholder Engagement in the Age of Social Distancing

Digital engagement strategies to maximize participation when we can't meet in person



The COVID-19 pandemic has upended, in a few days, the way we live, work, and interact with each other. The project approvals process usually involves a series of touchpoints with multiple stakeholders that now have been canceled or moved behind closed doors.

What can we do to address these new challenges?



**Developer**

*How will this impact the project review process?  
We can't stop the project pipeline for months*

*You can leverage **technology** – we use it all the time for coordination and meetings!*

*I agree, but how can we keep the system working with no face-to-face interactions?*

*Yes, but really the question is not **if**, but **how** we use technology to ensure **transparency** and **meaningful** stakeholder input*



**City Official**

In COVID-19 times, online engagement is no longer a nice-to-have complement, but the essential substitute of in-person engagement.

***“The show must go on!”***

# Understanding engagement needs

**Not all engagement activities are created equal in terms of methods, dynamics, communication patterns, formats, and participant numbers and types.**

For translating physical to virtual engagement there are two key criteria to organize engagement activities: Interaction Type and Audience Size.

## Interaction type

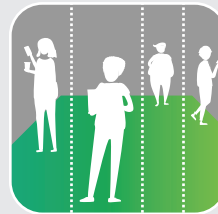
The temporal alignment of participant interventions in an engagement activity. It makes a difference if people are engaging individually or collectively as a group.

*Important because...* it tells you what the technology needs to be able to do.



### Synchronous Interaction

When the participants engage with each other at same time.



### Asynchronous Interaction

When the participants engage individually at their own pace.

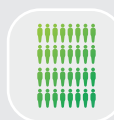
## Audience Size

The size of the group that participates in an activity. You cannot engage the same way with a large group as you would do with a small group.

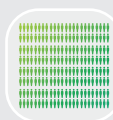
*Important because...* it tells you how many participants the technology needs to support.



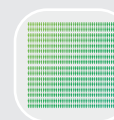
**2-8 people**  
Unstructured two-way conversations



**8-48 people**  
Structured two-way conversations with moderators and/or rules



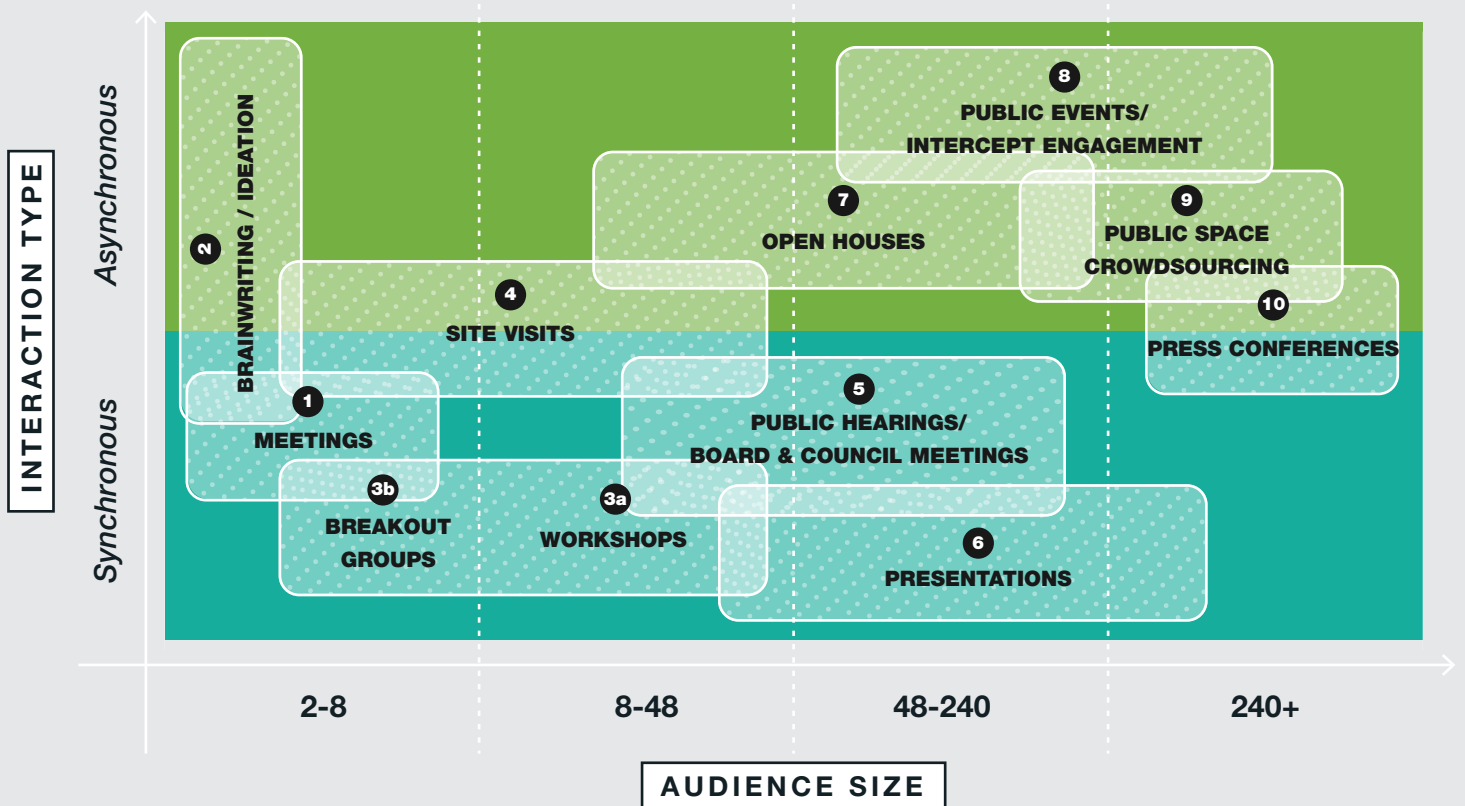
**48-240 people**  
Events with structured (or semi-decentralized) communication flows



**240+ people**  
One-to-many 'broadcasting' (or fully decentralized) events

## Stakeholder Engagement Typology Matrix

Each of the engagement activities will need a tailored technology solution to successfully transfer online.



### KEY POINTS

- Each of the 10 activities is a candidate to be **“translated”** into a **virtual format**; existing technological applications work best for some but not for all.
- Asynchronous events** are easier to transfer online, because they need not provide the protocols for people to interact with each other in real time.
- Synchronous physical activities** may need to be subdivided into a series of asynchronous virtual activities to accomplish the process’ needs.
- For some activities, **a mix of technology solutions** may apply, as there may not be an existing “miracle app” that does exactly what is needed.
- Key criteria for choosing the best online apps technology are **usefulness, convenience, personalization, choice, experience**, and **user involvement**.
- Online apps should be as **straightforward, intuitive, simple, accessible, ubiquitous, barrier-free** and **device-agnostic** as possible.
- Equipment, equity** and **accessibility** issues are important aspects; some existing applications are better than others to ensure availability for all.

# Moving your engagement activities online

## IN-PERSON ACTIVITY

## ONLINE SUBSTITUTE

## CHALLENGES & OPPORTUNITIES

1

## Meetings

Synchronous Interaction

2-8



Meetings are the most ubiquitous and simple engagement activities. Planning and approvals processes are full of these, and usually take place at the city offices.

Meetings are the easiest form to move online and there are many applications that are commercially available for this. Participants need to be able to connect outside of the office however.

### Some available tools

GoTo Meeting | Zoom\* | Meet | Teams

\* Some vulnerability/security concerns

- + Barrier to entry low
- + Encourages discussion
- + Many existing platforms
- + Easy to show participants' screens
- May require additional apps for all participants to draw
- Whiteboarding difficult to mimic well online

2

## Brainwriting / Ideation

Asynchronous Interaction

2-8



Orchestrated idea generation sessions, where a small group of people propose, discuss, prioritize, and refine ideas to make an initiative or a project better. We like to start these with an individual 'brainwriting' exercise to avoid loud voices dominating the conversation.

Online engagement platforms sometimes include ideation tools. Many contain features for the phases after ideation, i.e., discussion, ranking, and selection of ideas. The ideation process needs to be open for a week or two to collect all ideas and then vet them.

### Some available tools

MindMixer | EngagementHQ | socialpinpoint | Mural | Deskle

- + Some existing tools include ideation capabilities
- + The ideation process can happen asynchronously
- + It's easier online to gauge community support for ideas
- Requires breaking up the ideation process into a series of stages
- Needs more time to produce results
- Nuances of ideas may be 'lost in translation'

3a

## Workshops

Synchronous Interaction

8-48



In-depth sessions where participants explore a particular topic through targeted exercises and games, usually in a group setting. Usually you explore ideas and then you discuss, prioritize and select the most appropriate solution.

Online workshops will need to be subdivided into asynchronous pieces or cycles to allow the input generated at each stage to be summarized and shared with the online group before tasking them with the next step. It will be essential to have tactics to ensure 'stickiness' so people continue through all rounds.

### Some available tools

Socialpinpoint | Mural | Miro | Deskle | Minecraft | IBI Parametric Engagement Tool

- + More people can participate in online than in physical workshops
- Requires understanding of more complex engagement tools
- There is not a single tool that works for all workshop needs
- Can be complicated and time-consuming to manage
- Can be difficult to maintain interest throughout the workshop cycles



## 3b

## Breakout Groups

Asynchronous Interaction

2-8



Workshops of more than 8 people use breakout groups as a time-tested tactic of maintaining meaningful two-way conversations without imposing a strict protocol of rules.

If breakout groups are only verbal activities with a facilitator, they are easy to move online (see 'Meetings'). If they involve additional activities, they will need to be supported with other tools (see 'Workshops').

## Some available tools

GoTo Meeting | Zoom\* | Meet | Teams

\* Some vulnerability/security concerns

- + Small group work can easily move to online meetings
- Will require additional tools if specific activities are requested
- Requires pre-coordination to assign people to their group
- Needs participation of all group members in real time
- Report out does not happen in real time

## 4

## Site Visits

Asynchronous Interaction

Synchronous Interaction

2-48



Site visits involve participants being physically present in a place. They are part synchronous, part asynchronous, as they usually happen in groups, but people experience them individually.

There are clear limitations for their transferability online, but they could migrate to narrated video tours for people to download and watch at their leisure. VR apps would be great, but they are not widespread; before-after visualizations with sliders are a good alternative.

## Some available tools

YouTube | Vimeo | Google Cardboard | Before/After Sliders

- + Digital site visits are accessible any time, anywhere
- + New projects are able to be visualized digitally
- The full experiential benefits are never attained through simple means
- Virtual reality is great, but requires equipment not found in the normal home

## 5

## Public Hearings/Board &amp; Council Meetings

8-240

Synchronous Interaction



These activities contain highly scripted and regulated procedures to ensure the process is fair and transparent by (nominally) ensuring stakeholder participation. They include staff presentations, interventions by the public, deliberation by the public body, and voting.

A webinar app allows for all people to sign-up in advance for listening and to participate. It enables introductory presentations as well as written or video-streamed questions, all under control of staff. A key improvement could be the virtual support of the community of each intervention prior to voting.

## Some available tools

GoTo Webinar | WebEx | Zoom\*

\* Some vulnerability/security concerns

- + Many more people could participate in public hearings / board meetings
- + The broader opinion of the community can be taken into account
- + Skews and extreme positions of participants can be corrected
- Requires sign-up of participants before the meeting
- May have legal/accessibility/equity issues for implementation
- Needs a fair amount of planning and preparation by staff

## 6

## Presentations

Synchronous Interaction

8-240+



A one-to-many activity where one person presents a specific topic to many others, sometimes with a Q&A session at the end. They are tilted towards one-way communication.

Presentations are easily moved online using webinar apps that are set up to do exactly that. They contain tools that enhance the process, like chat windows, real-time polls, and question buttons.

## Some available tools

GoTo Webinar | WebEx | Zoom\* | Teams

\* Some vulnerability/security concerns

- + Presentations reach a much larger audience
- + More interactivity with the presenter than in-person events
- + Ability to download a video of the presentation if people can't attend
- Need to register before the event to participate live
- More impersonal and anonymous than live events
- Easier to lose the attention of the participants

## 7

## Open Houses

Asynchronous Interaction

8-240



Collective event where each person interacts with staff, boards and activities individually and at their leisure within a set event timeframe. They also serve an important public education function.

Because of its asynchronicity, open houses are well suited to move online. Many commercial online engagement platforms serve the information, education and feedback functions usually done at the open houses.

## Some available tools

CivilSpace | EngagementHQ | MetroQuest | MindMixer

- + Much broader and balanced reach than the in-person events
- + Good transferability and availability of online engagement platforms
- Less personal than face-to-face event; no one to talk to
- More challenging for older and tech-limited audiences

## 8

## Public Events/Intercept Engagement

Asynchronous Interaction

240+



Engagement of people at places where they are, like family events or farmers' markets, rather than expecting them to go to your engagement session. Usually a stand, a table or staff circulating with tablets.

Since events will not take place, the substitute for this is, again, online engagement platforms, and the intercept is the organization's and other organizations' social media channels

## Some available tools

Instagram | Facebook | CivilSpace | EngagementHQ | MetroQuest

- + Much wider audience than at specific events
- + Ability to attract people from social media to project website
- Requires large social media presence to be relevant
- Attention competing with many other distractions online
- Much lower capture rate than at specific events

## 9

## Public Space Crowdsourcing

Asynchronous Interaction

240+



Informal and opportunistic engagement in public spaces that trigger participation by passersby by placing strategic participation resources like public blackboards on the sidewalk.

If people can be enticed to participate, the online version of this activity would include unstructured online forums or more targeted surveys with open-ended text boxes or word clouds.

## Some available tools

Poll Everywhere | Poltio | Google Forms | Survey Monkey | MetroQuest | Civil Space

- + Some apps offer real-time results of other participants – great for stickiness!
- + Ability to understand and segment participants
- Potential lack of cohesiveness and focus of participation
- Requires an information and diffusion campaign to make people aware
- Is less immediate and may feel too structured or formal

## 10

## Press Conferences

Asynchronous Interaction

Synchronous Interaction

240+



Press conferences are, by nature, one-to-many broadcasting activities, with the physical engagement activities circumscribed to questions (usually by reporters).

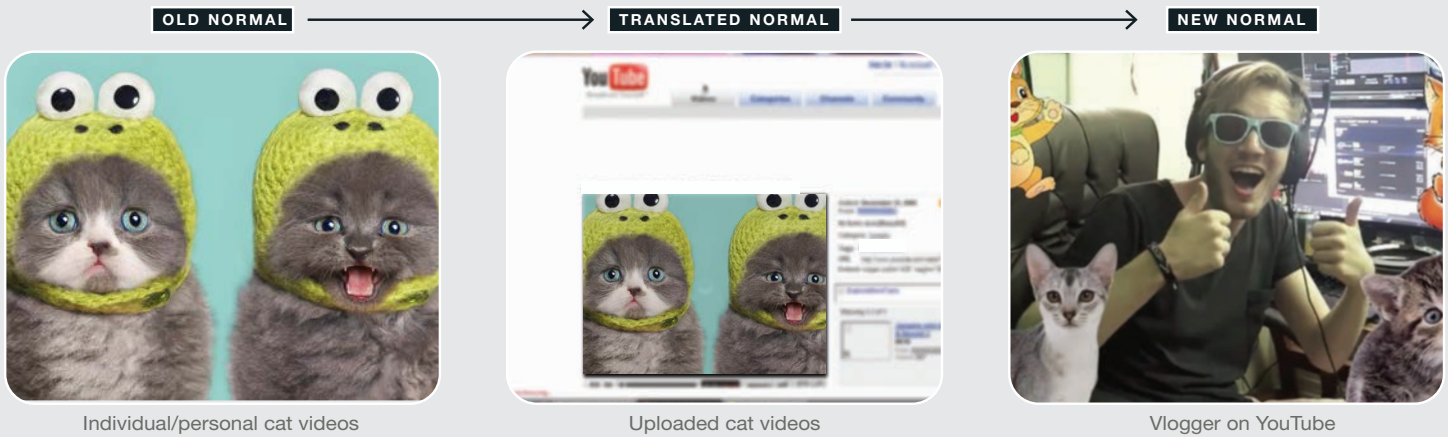
The online version will be most likely be a presentation run on a webinar platform, where questions can either be submitted in writing or by “raising a hand” and opening up the mic to the participant. The event can then be uploaded as a video.

## Some available tools

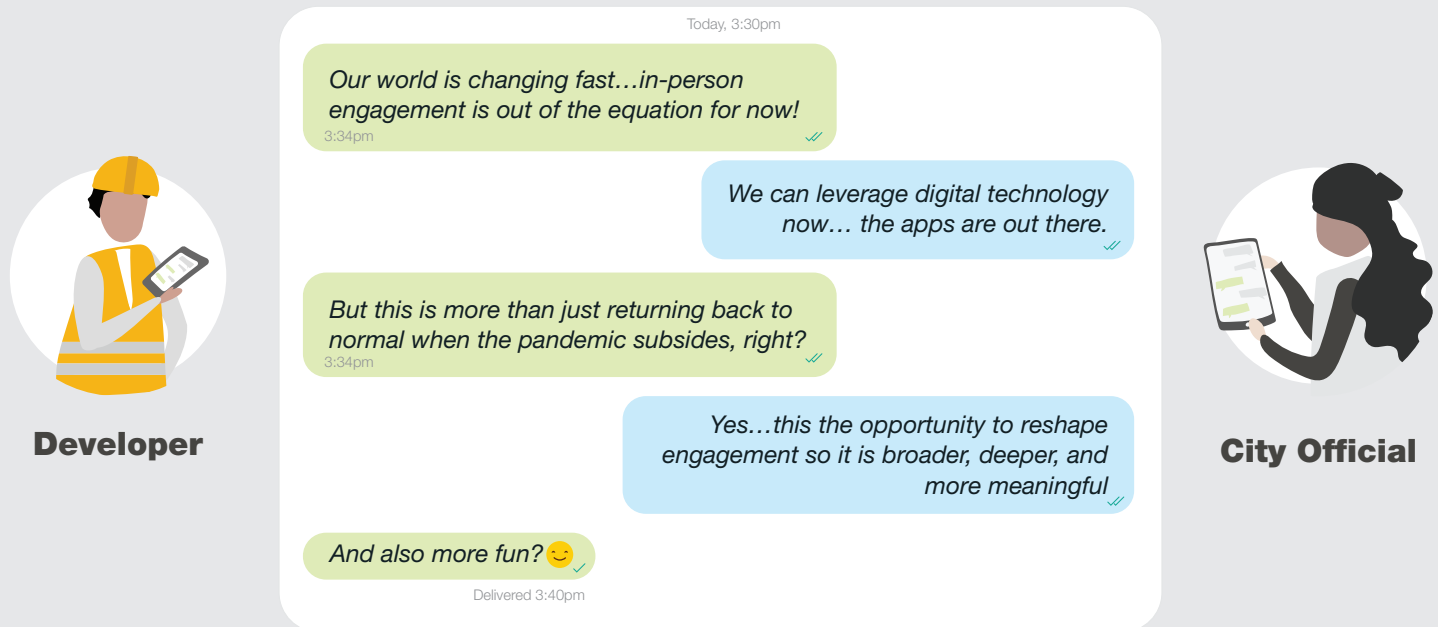
GoTo Webinar | WebEx | YouTube | Vimeo

- + A broader pool of attendees can be reached; more questions can be asked
- More impersonal and distant than the real event
- Already an activity with very little stakeholder engagement opportunity

# Going beyond translating activities online



YouTube first started as a site mirroring what we already did before (upload cat videos), but then creative people leveraged the capabilities of the platform to do something new altogether (vlogging).



This is the **right moment** to rewrite the engagement playbook – there is a **why**, there is a **how**, and there is a **when**!



Defining the cities of tomorrow  
ibigroup.com

Read the full paper here:  
<https://tinyurl.com/postcovidengagement>

