vhb viewpoints

Innovative Approaches to Facilitate Virtual Engagement

COVID-19 is creating new communication challenges for our industry, particularly as it relates to meetings where in-person attendance for input and decision-making is required to advance critical initiatives, such as Planning Board, Town Hall, Zoning Commission, or traditional Stakeholder Outreach meetings for major projects. Fortunately, technology has made significant advances to allow for continual interaction in a virtual manner.

While creating in-person connection points and meetings will always be important, clients and communities are seeking creative and innovative ways to virtually interact, engage, and solicit public opinion. **Innovations in technology, and effective application of that technology, make it possible to conduct meetings anywhere, even virtually, helping to reach wider audiences and move projects forward through the public approvals process.** In addition, recent executive orders, such as those to address the COVID-19 pandemic, are giving some states unprecedented flexibility to hold virtual public hearings and meetings to facilitate timely public participation.

While each meeting is different, and often poses unique challenges, preparedness, creativity, and flexibility are key to successful virtual engagement.

Common questions include:

» What **steps** do I take to implement a virtual meeting environment? Is there a resource available to help guide me through the process?

» What **tools** are available, including software and equipment? What is the associated cost?

» Does my city or state have public meeting **laws or regulations** in place that may restrict virtual meetings?

» How can I **engage** participants with disabilities or those who speak another language?

To help our clients take full advantage of the latest options for communication and outreach, particularly to help during times of public crises, like COVID-19, VHB prepared best practices (see page 2) and step-by-step guidelines (see page 7) based on our experience successfully navigating new technologies.

Virtual meetings can create efficiencies:

→ Increasing **engagement** and promoting a **more inclusive process** by allowing residents to participate despite accessibility challenges, remote locations, or impacts to travel.

→ Potentially **accelerating project delivery** by identifying and addressing public concerns early in the planning process, avoiding delays and the need to adjust approaches later in the process.

→ Providing **cost efficiencies and promoting sustainability,** as both travel and meeting space requirements and costs are significantly reduced or eliminated.

Virtual Meeting Best Practices

Facilitating virtual meetings is a new experience for many. At VHB, we've assisted many clients by sharing tactics and strategies that allow for seamless engagement and a positive experience for both facilitators and participants. Based on our lessons learned, the following are examples of best practices for facilitating a successful virtual meeting:

» Clearly **define and assign roles** so the host and panelists understand the process and are prepared to navigate a virtual environment.

» **Rehearse!** Run a mock meeting with a small number of participants to learn how the platform works.

» **Test speakers and microphones** in advance and, if possible, use a headset.

» **Know how to mute** the whole audience, mute yourself, and how to unmute an individual or another host when you want to allow them to speak.

» **Mute all participants when a host is presenting** to avoid interrupting presentation flow. Instruct participants to raise their hands (digitally) when they want to comment or speak and assign a moderator.

» Ask participants to **submit questions to a designated moderator** using either email or the chat function. This allows for vetting and clarifications and provides a digital record of all questions asked.

» Know how to **share and un-share content** (in case content needs to be updated or changed).

» If using VPN or remote desktop from home, disconnect before starting the meeting.

» If using shared internet service from home, ask others not to stream videos during your meeting.

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Sharing Content

Sharing information is an important aspect of facilitating a successful virtual meeting. While there is no one-size-fits all approach, below are several options:

» **Distributing Material Prior to the Meeting**
Post the meeting link, agenda, and handouts in an easily accessible location in advance so participants can download materials at their convenience. Use a free viewer format such as Adobe PDF, which is readily available on all devices.

» **Sharing During the Meeting**
Materials can be shared on screen; however, remember some participants may only be listening (see Accessibility Strategies for Diverse Populations), so thoroughly describe or read the materials being shared.

» **Mailing Presentation Materials**
When necessary, documents can be mailed to participants prior to the meeting. Plan ahead to allow ample delivery time.

» **Pre-recording**
The presentation part of a virtual meeting can be pre-recorded prior to the event. The presentation can then be played during the meeting, as well as shared with those that will be listening but not viewing.
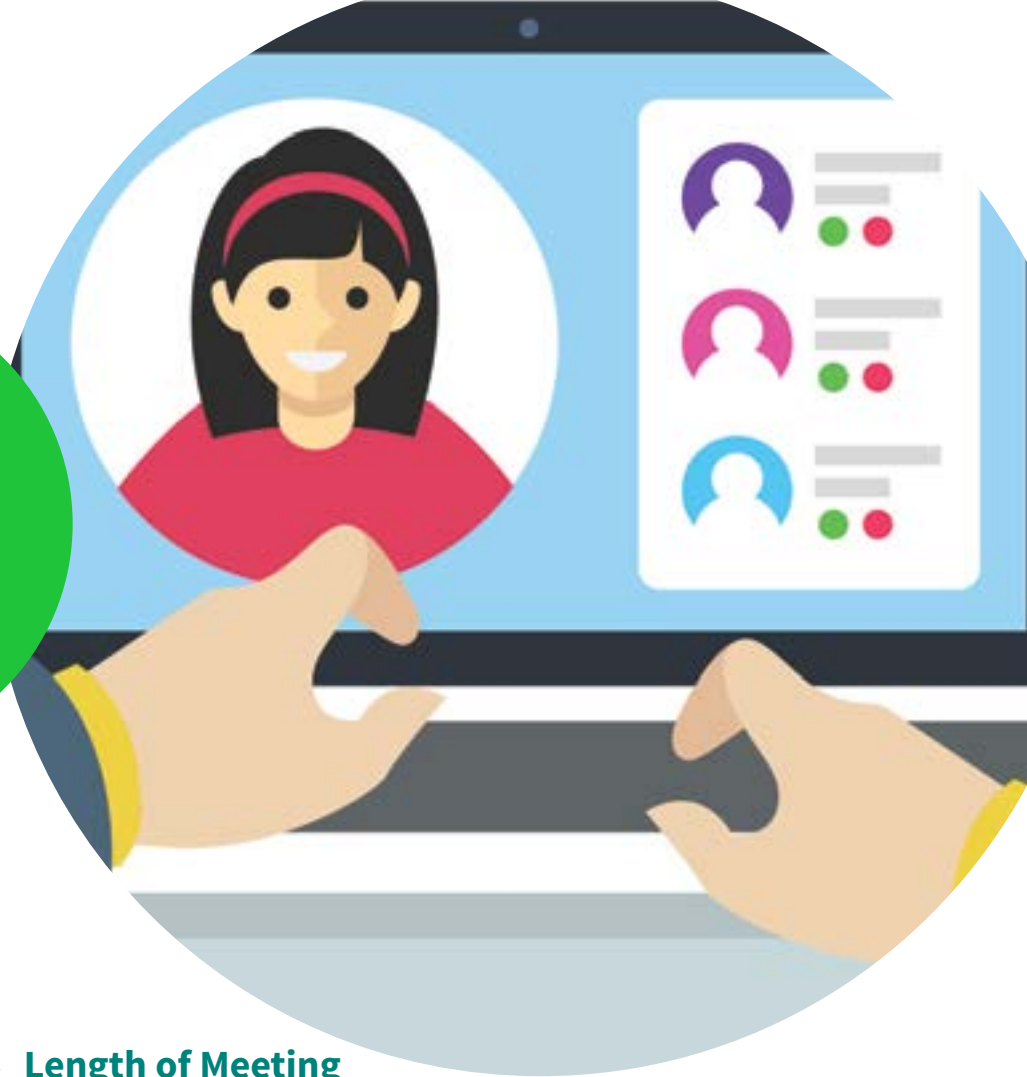
Recording

Having a record of the meeting is an important consideration when planning a virtual event. All platforms we are recommending allow you to record a meeting while it is in progress and download it for future use. A link of the recorded meeting can then be shared so people unable to attend can view it later and provide feedback. There are several important considerations when recording meetings. Know your system capabilities to avoid missing or losing important content.

» **Length of Meeting**
Some software platforms have restrictions on the length of a meeting that can be recorded and stored (as short as 40 minutes), while others provide unlimited length.

» **Storage Options**
Some platforms have limits on how long recordings are stored before being deleted or before charges apply. Most provide the option to record in the cloud or to record locally.

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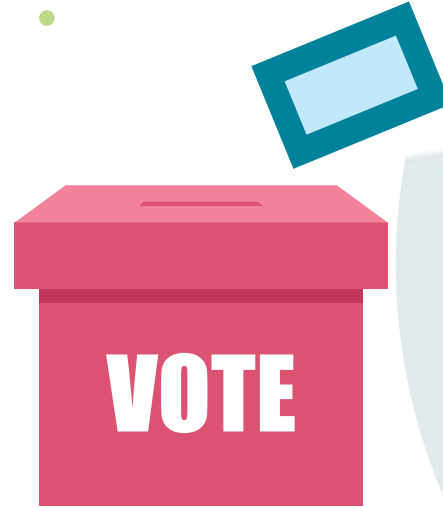
Voting and Polling

Platforms offer several options for virtual voting. The most common capability is polling. At any time during the virtual meeting, a host can start a poll and get feedback from all participants, drawing from a predefined set of questions that are prepared and stored in the platform. Each participant answers once, and the host can decide whether to share the answers in real-time with the audience or just with other hosts.

When taking formal votes, including those requiring participants to take an action, such as approving an item on the agenda, we recommend using voice votes. With voice votes, each voting member is called upon by the host to provide their vote verbally. This allows for better record keeping and, combined with only unmuting the voting individual, confirms that the person called upon is the person voting.

For more advanced engagement with participants, VHB is a licensed partner with MetroQuest and is currently utilizing this software in several master planning efforts, including the St. Petersburg, FL, Vision Plan. MetroQuest provides a high-quality visual interface in which users are able to see the impact of their choices and priorities, learn about alternatives and trade-offs, and visualize options, resulting in more meaningful, educated public input and quantifiable data that can inform decision making. The value in utilizing this tool will be the ability to efficiently reach out to large numbers of stakeholders in a very targeted way.

Live Streaming and Public Television Integration

Understanding local government requirements for broadcasting meetings on public television is important. If the local cable company cannot tie its system into a virtual meeting, one option is to set up a YouTube channel to simulcast the meeting. Participants can visit the channel and watch the meeting using email, text, or phones to communicate and engage during the meeting.

Planning Your Virtual Meeting: Where to Start?

Planning and executing a virtual meeting can seem daunting to those new to this environment. VHB has personnel experienced in implementing and facilitating virtual meetings and we can help you assess specific needs, determine appropriate solutions, and develop a plan to execute that is tailored to your individual project needs. For example, the requirements and needs for a public hearing will be different than a zoning board commission meeting.

To determine the best approach, we employ a three-step process that includes needs assessment, choosing the right platform, and developing a plan for execution.

STEP 1

Assessing Your Needs: Understanding the goals and requirements of the meeting is the first step. Questions such as how many participants do you expect; will a vote be required; will the meeting be interactive or directive; and will you need to share documents, drawings, or figures provide the information needed to determine the right approach.

STEP 2

Choosing the Right Virtual Meeting Platform: There are more than 25 virtual webinar platforms available to effectively conduct a virtual meeting. Based on our previous experience and a thorough vetting process, we have found **three platforms** that meet most client needs.

VHB can help identify which virtual webinar platform is most appropriate for you depending on the type of meeting and level of participation. A comparison of those products and related costs is detailed to the right.

Technology Platforms Options

Through daily involvement in public meetings and engagement efforts, VHB has conducted extensive research into many existing platforms that can be used for virtual meetings. We have chosen to standardize on Zoom as our platform, but also know that LogMeIn and Webex provide similar functionality described. The following summarizes current capabilities of the three platforms.

Service Capabilities	LogMeIn	Zoom	Webex
Meeting capacity	250	300	200
Webcast capacity	500	500	Scalable
Recording of meetings	Cloud/Local	Cloud/Local	Cloud/Local
Video Storage	Cloud	Cloud	
Plug-in required	Optional	App only	App only
Browser support	Browser/App	App only	App only
Mobile support	Mobile App	Mobile App	Mobile App
Dial-in, call back options	Both	Both	Both
Scheduling complexity	Simple	Simple	Simple
Video quality	High	High	High
Cost	$199/mo.	$149/mo.	Contact Sales

Costs to Run a Virtual Meeting

Cost is another key consideration when determining the appropriate virtual meeting platform. The licensing costs range from approximately $150 per month to $300 per month depending on the number of hosts and number of participants expected. These base prices include most of the capabilities described and support 100 hosts and 300-500 participants. For further information on pricing visit the software vendor websites:

LogMeIn (GoToMeeting) | **Zoom** | **Webex**

STEP 3

Executing a Virtual Meeting: After the virtual meeting platform has been decided, the next step is execution and implementation, which includes setting up the platform, scheduling the meeting, outreach to participants, facilitating the meeting, and follow up.

VHB works with clients to successfully execute virtual meetings in a variety of ways—from guiding through best practices to hands-on technical support prior to and during meetings.

Accessibility Strategies for Diverse Populations

Input from a wide variety of stakeholders results in the best project outcomes, and providing options that allow for full engagement is critical. Accessibility for participants and addressing the needs of diverse populations are key considerations when planning and executing a virtual meeting.

VHB regularly works with diverse communities and understands the tools and adaptive technologies available to provide assistance to our clients that includes most stakeholders.

Assistance may include qualified sign language and oral interpreters, assistive listening systems, and real-time captioning (also called CART—Communication Access Real-time Translation or Computer-Aided Real-time Translation) services. Accessible exchange of information for people who are blind or have low vision may require that printed materials are provided in alternate formats (e.g., Braille, large print, audio recordings, or text on CD) or that notetakers are provided. The auxiliary aids and services needed at any one event will depend both on the participants and the meeting's format, content, and handouts.

With experience facilitating the public hearing process across our footprint, VHB can help navigate specific local accessibility requirements and provide best practice guidance in areas such as invitation content, identifying and coordinating auxiliary aids and services, providing background information to people with sensory disabilities, and how to present audiovisual information to audiences with disabilities.

Meeting and Webcast Roles and Capacity

Three groups of people are involved in virtual meetings: **hosts, panelists,** and **participants. Hosts** set up and orchestrate a meeting. **Panelists** are presenters or voting members who are active participants in the meeting process. **Panelists** must be able to share content, such as documents, drawings, or figures and should be visible on-screen to the audience. Similar to audience members at in-person meetings, **participants** typically listen to the presentations with minimal active involvement. **Hosts** can facilitate **participant** engagement, similar to when the floor is opened for questions at an in-person meeting. Different platforms have varying capacities for **hosts, panelists,** and **participants**, ranging from a small number of hosts, 100 **panelists**, and up to 500 **participants**.

We're Here to Help

VHB is a leader in using technology to improve operations and address our clients' issues and challenges.

These are unprecedented times! We're here to help keep your day-to-day and key projects moving forward.

To learn more, contact Ken Schwartz, AICP, NCICS, Planning + Design Service Leader at **kschwartz@vhb.com**.

Accessible meetings allow for meaningful engagement for participants with disabilities, improves the experience for everyone, and results in the best project outcomes.

VHB recently coordinated and implemented a virtual meeting as part of the Federal Highway Administration's (FHWA) MIRE-FDE project. The meeting included more than 150 participants from all 50 states and featured live content, audience Q&A, and was presented by four panelists in three different states using Zoom.