Virtual Engagement Guidebook

National Center for Applied Transportation Technology

KEARNS WEST

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Introductions

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What We'll Cover

- Guidebook Approach
- Key Takeaways
- Mini Case Studies
- Virtual Engagement Practices
- Questions & Answers

Guidebook Approach

- Industry best practices from transportation organizations
- Approaches for meetings and other forms of engagement
- “How-to” guidance
- Insights from transportation organizations

Hopelink – King County, WA

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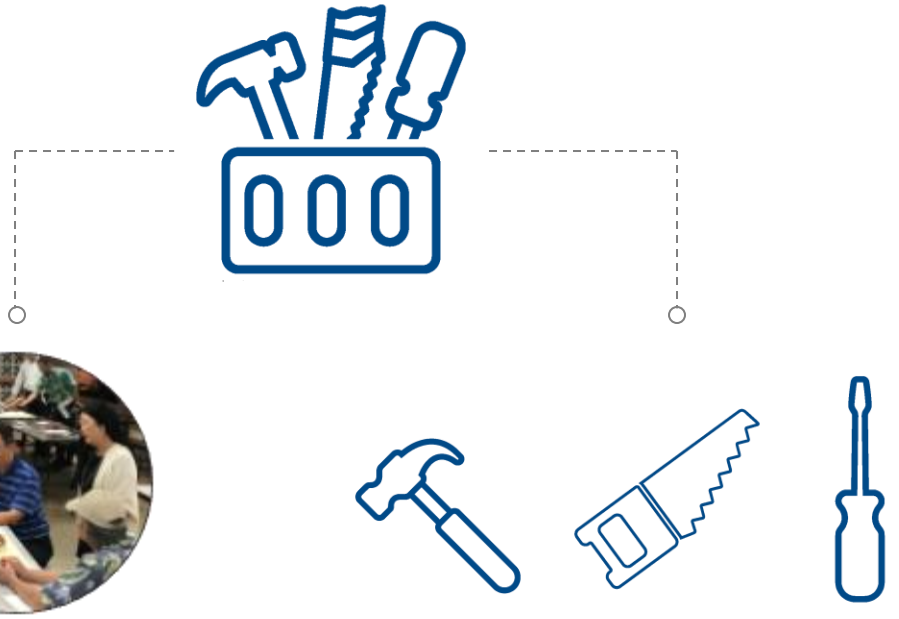
Defining Engagement

What is engagement?

At a minimum, engagement is an <u>exchange</u> of information.

How does it work?



Meetings/Events

Others

Motivators for Transportation Organizations

1. Inform

Deliver timely and credible information to transit riders, target stakeholders, and the general public.

2. Engage

Solicit community input and feedback on transit plans and proposals.

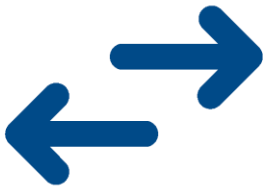
3. Persuade

Secure buy-in and community understanding of transit projects or agency priorities.

Key Themes

There are a lot of opportunities.

- Provides flexibility, spurs innovation and allows agencies to “rethink” the status quo.
- When combined with offline approaches increases the size and diversity of the audience.
- Conducted in partnership with other agencies increases access to resources, knowledge-base and reach.



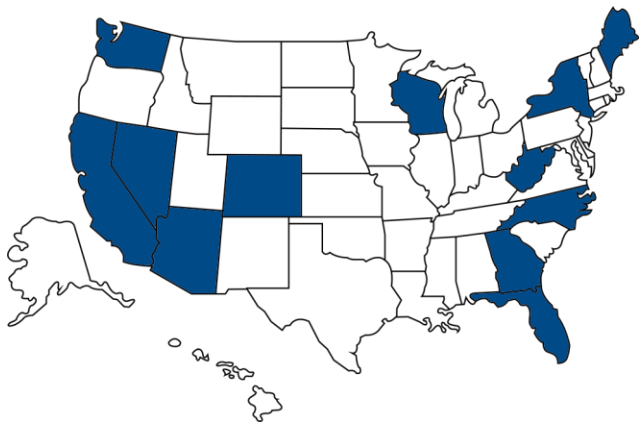
There are several tools and approaches. Choose the <u>combination</u> that works best for your needs.

- Transportation organizations are adapting to pandemic differently and have different levels of success based on community needs and the organization’s culture and staffing.
- Successful virtual engagement uses a mix of approaches and tools.
- Many different tools are available and most serve specific needs.

Limitations exist.

- There is limited guidance for transportation organizations on virtual engagement.
- Not all tools provide same level of access for all user types.
- Virtual engagement is not always a perfect substitute for in-person engagement.

Mini Case Studies



1. Valley Transportation Authority
2. Yolobus + Unitrans , CA

Asheville Rides Transit, NC

Hopelink, WA

Center for Pan Asian Community Services, GA

Neighbor Network of Northern Nevada, NV

Greater Portland Council of Governments, ME

Mountain Line, AZ

Kanawha Valley Regional Transportation Authority, WV

Boulder County Mobility for All, CO

Miami-Dade TPO, FL

Eau Claire Transit, WI

Tompkins Consolidated Area Transit, NY

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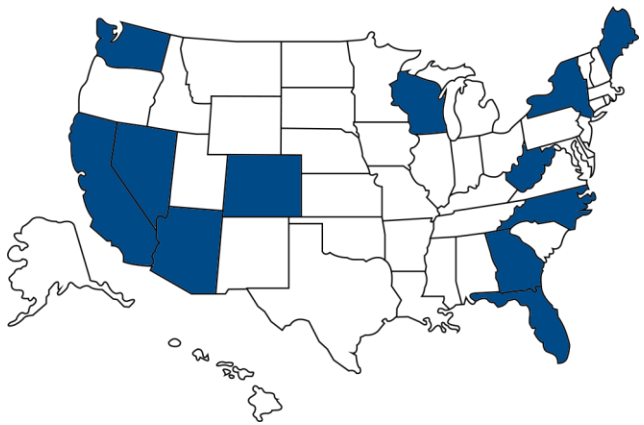
Mini Case Studies



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Mini Case Studies: Asheville Transit Department

Asheville Redefines Transit

Refined internal capacity for virtual engagement before expanding external virtual engagement.

- Conducted an extensive assessment of virtual engagement platforms to understand the current scope of available platforms and determine which one best met their needs for internal and external engagement.
- Disseminated virtual engagement capacity through mandatory platform trainings.
- Began conducting regular virtual meetings with community organizations to educate community members on current initiatives and ensure that public voices and ideas are captured in the transit policy conversation.

Mini Case Studies: Miami-Dade Transportation Planning Organization

Miami-Dade Transportation Planning Organization

Identified creative and strategic methods to broaden stakeholder outreach and engagement and communicate transportation planning information in a fully virtual environment.

- Partnered with Community Advisory Committees (CAC) to hear and learn from the heartbeat of the community and keep them involved in the transportation planning process.
- Began hosting a virtual lunch series titled "Taste of Transportation" within Miami-Dade County's 7 transportation planning areas (TPAs).
- Capitalized on existing partnerships, with entities such as the library system and Miami-Dade Police Department, to explore new ways to keep the general public engaged.

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Mini Case Studies: Neighbor Network of Northern Nevada

Neighbor Network of Northern Nevada

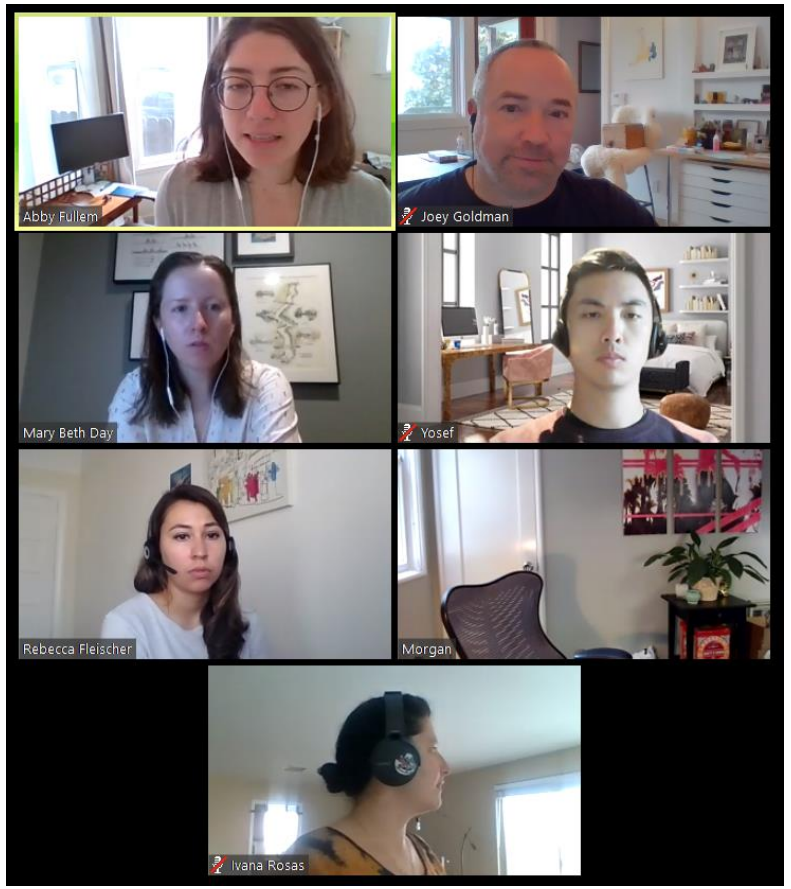
Migrated planned in-person summit for at-home caregivers to two, half-day virtual summits on Zoom.

- Exceeded attendance expectations of planned in-person event
- Leveraged coalition volunteers to facilitate break-out rooms for small group discussions
- Replicated benefits of in-person experience in a virtual environment

Mini-Case Studies: Experience Going Virtual

COVID-19

- All organizations saw large drops in passengers/users.
- Most organizations had little or no virtual engagement prior to the pandemic.
- Most organizations pivoted quickly to virtual, but all experienced "trial and error."
- All organizations have found their partners to be valuable in supporting engagement.
- All will continue some form of virtual engagement for the foreseeable future.



Mini-Case Studies: Different Experiences

Virtual meetings remove some barriers: travel time and physical transportation, making them **more accessible**.

The virtual space inherently **limits inclusion** because it is difficult to reach people without access to or knowledge of internet or phone, data, or Wi-Fi.

Moving meetings online has resulted in **higher participation overall**: more people are joining online than they did in person.

People are experiencing Zoom fatigue and **participation is dropping**.

Virtual engagement is **more efficient** because meetings are easier to manage and they end on time.

Virtual meetings seem to **take longer**: introductions are more cumbersome, people feel like they need to voice their opinions when virtual.

Virtual Engagement

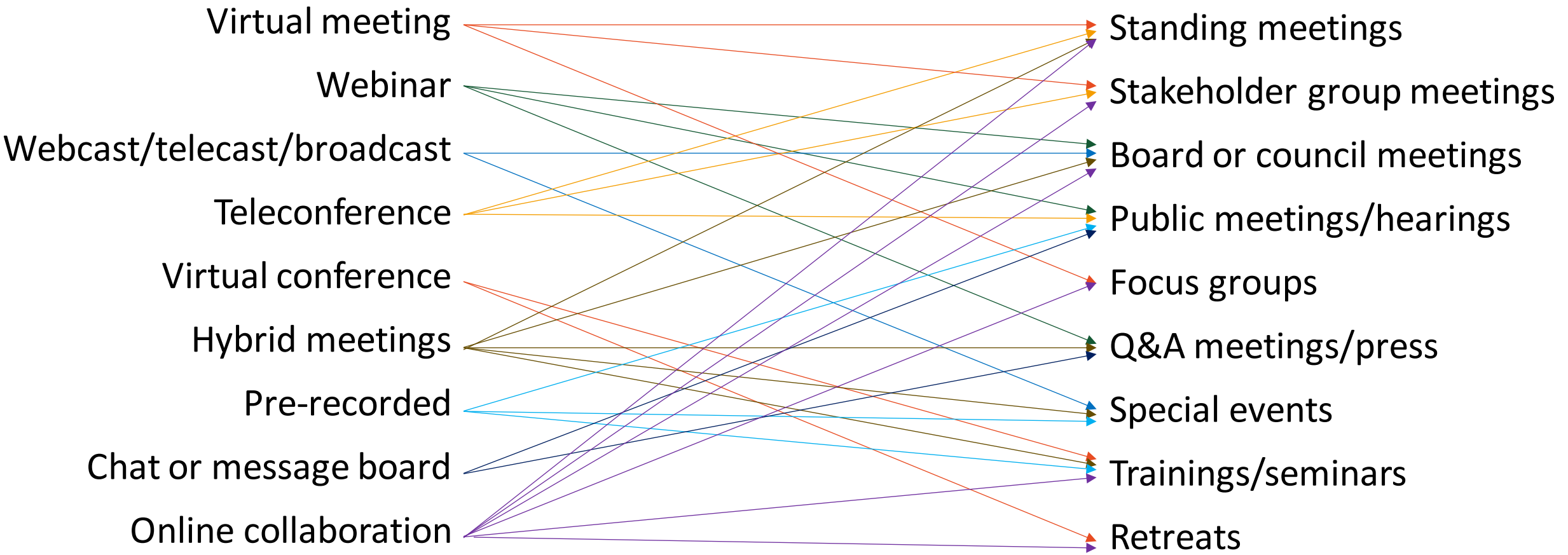
Challenges

- Software acquisition, management, and staff expertise
- Privacy and data security
- Digital divide/access to technology tools
- Technology limitations for individual engagement
- Quality of human interaction
- Virtual meeting fatigue/level of interest

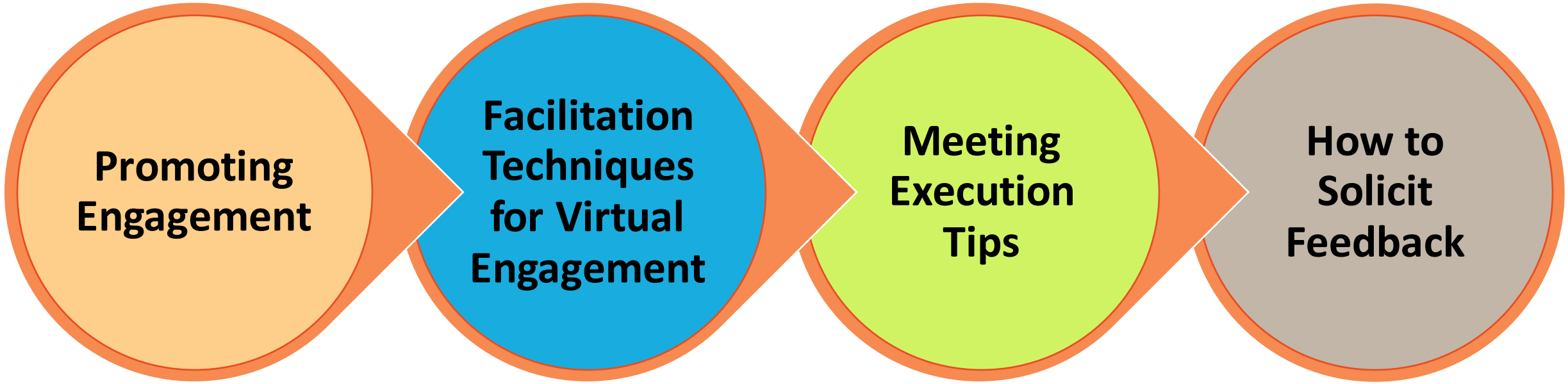
Opportunities

- Potential cost savings for agencies and time savings for participants
- Greater reach and more frequent touch points
- Flexible tools for participation (text, video, voice, multilingual)
- Administrative controls for managing the dialogue
- Accessibility options (real-time, automated)
- Safety in a pandemic

Meetings and Events



Effective Virtual Meetings and Events



Promoting Engagement

- Assess community resources and capacity
- Use multiple methods to distribute invitations
- Ensure accessibility compliance

Facilitation Techniques for Virtual Engagement

- Define meeting objectives and desired outcomes
- Design the meeting format with meeting objectives in mind
- Create a facilitation plan
- Define and confirm project roles
- Create and enforce participation guidelines

Meeting Execution Tips

- Join the Meeting Early
- Explore Webinar Security Settings
- Use Instant Messaging to Coordinate with Other Meeting Hosts
- Make Meeting Materials Available to the Public
- Offer Responsive Technical Support to Participants

How to Solicit Feedback

- Reactions or Emoticons
- Polling
- Discussion Queue
- Webcams
- Chat Pod
- Consensus Building and Ideation

In no more than two words, please describe how have you solicited feedback during a virtual meeting?

Start the presentation to see live content. For screen share software, share the entire screen. Get help at **pollev.com/app**

When poll is active, respond at **PollEv.com/kwpoll1**
Text **KWPOLL1** to **22333** once to join

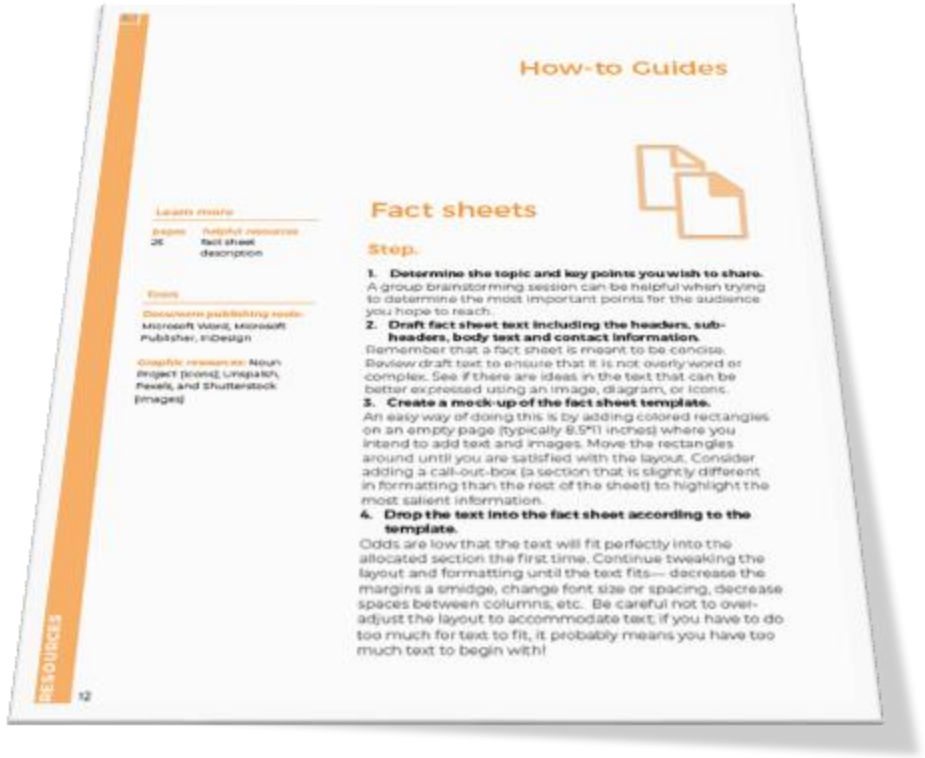
Which virtual engagement tools have you used before, outside of virtual meetings?

Fact sheets
Digital newsletter
Project website
Podcast
Videos
Online mapping
Surveys & questionnaires
Virtual whiteboarding
Social media

Start the presentation to see live content. For screen share software, share the entire screen. Get help at **pollev.com/app**

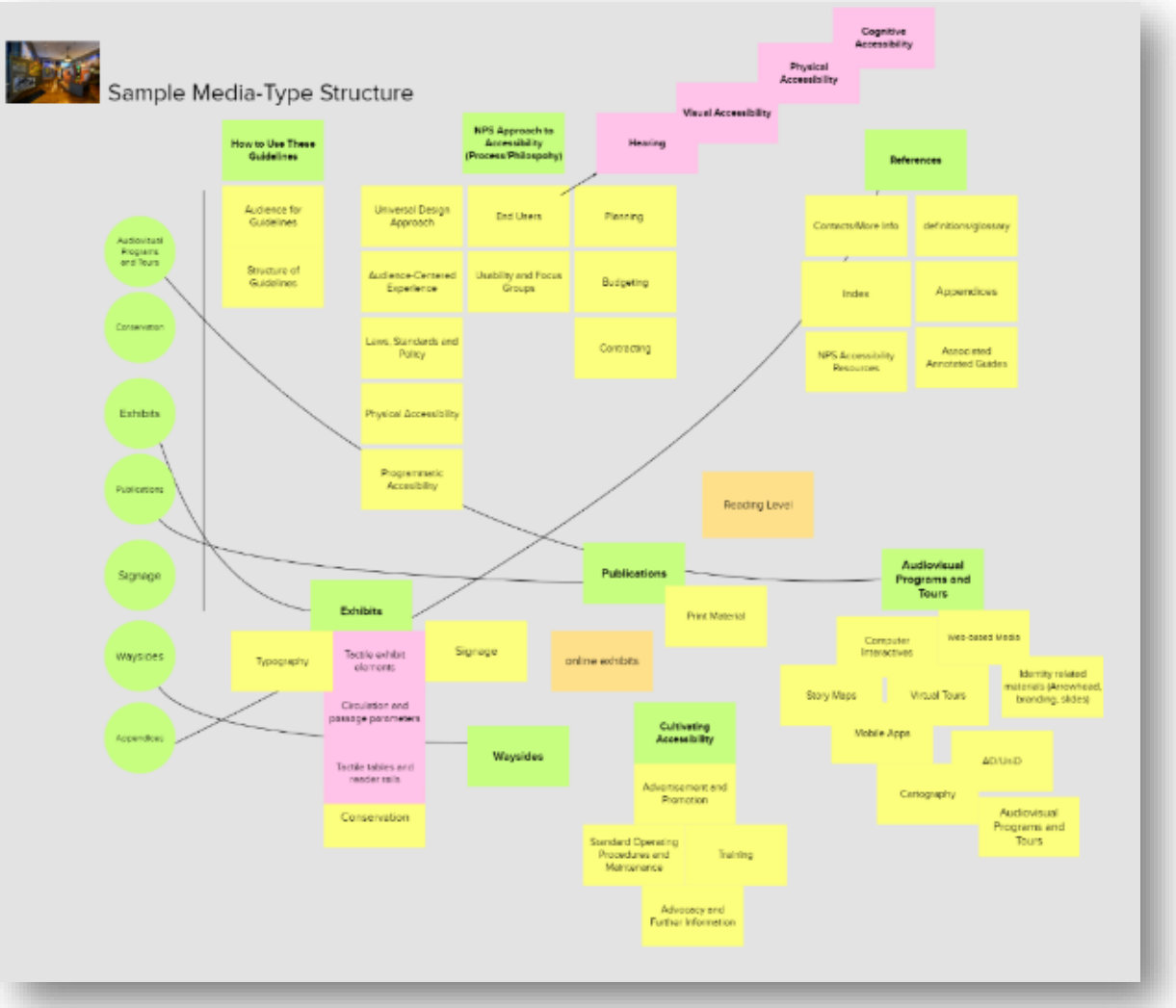
Other Forms of Virtual Engagement

- Social Media
- Project Website
- Videos
- Form-based Tools
- Fact Sheets
- Digital Newsletters
- Podcasts
- Meeting-in-a-Box
- Kiosks



Tools and Applications

- Webinar and Virtual Meetings
- Livestreaming and Video
- Scheduling
- Surveys and Polling
- Email Marketing
- Website Development
- Social Media and Brand Monitoring
- Digital Collaboration Tools
- Community Outreach and Planning
- Mapping



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Guidance Summary

- Confirm your engagement **objectives**
- Understand different **meeting types**
- **Test** technology tools to find the right ones for your organization
- Acknowledge that **inequities exist** and try to address them
- **Prepare** and practice … and practice
- Accept that virtual engagement is **not always a good substitute** for in-person
- Consider **hybrid** engagement and **low-tech** options

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Thank you!

Look for the Guidebook at n-catt.org