**Transcript: Virtual Public Engagement Strategies and Trends**

**Recorded February 23, 2021**

**Andrew Carpenter:**  All right. Good afternoon, everyone. We're just going to give a minute or two to let everyone get loaded in here and we'll get started. Yeah. Okay. Looks like everyone in the waiting room is now here, so we will kick things off. Welcome, everyone. Belated Happy New Year to you all. This is N-CATT’s first webinar of 2021. We're excited to be back. We have a lot of great stuff in store for you all.

So, our first webinar is on Virtual Public Engagement Strategies and Trends. So, of course, the past year has thrown everyone for a loop and made us really rethink how we do things but it's also presented a lot of great opportunities for how to engage with the public. So, we wanted to make sure we create a guidebook about how to go about this, the initial thoughts and trends and strategies that have come out of the past year, and then also, to do this webinar to give you a little extra information on it.

But first, if you could go to the next slide, Sam, I want to reintroduce N-CATT for anyone that is new to us. We are the National Center for Applied Transit Technology. We're a Federal Transit Administration funded technical assistance center. So, our goal is to work with small urban, rural, and tribal transit agencies to understand the emerging and evolving technology landscape among many topics such as virtual public engagement, zero emission vehicles, green infrastructure, data management software, decision making, and learn about different lessons that different transit agencies have learned different trends that are happening and different strategies to understand how to apply these technologies to your specific context.

We are operated by the Community Transportation Association of America. We have a wide variety of products. We have these webinars. We're working on guidebooks which are serving as the foundation for the next series of webinars that we're doing. We are developing a podcast series as well as some video profiles of cool stuff that different transit agencies are doing. And then we also have some hands on workshops in the works. And then we also provide direct technical assistance through our state technology summits and our innovative technology strike teams. Those are meant to walk state duties in the case of the summits and individual transit agencies through different strategies and visioning and decision making processes to get them to the point of being able to implement a technology that they identify as a key need for their agency.

So, with that, on the next side, we'll just introduce ourselves. I am Andrew Carpenter. I became the director of N-CATT in October. Also, I'll hand it off to Marcela for a second.

**Marcela Moreno:**  Hi, everyone. I'm Marcela Moreno, the transit technologist with N-CATT. I joined the team in December and came from the city of Asheville, where I was a transit planner.

**Andrew Carpenter:**  Thank you, Marcela. We're excited to get to work with everyone and to hear your thoughts and your needs, and be able to assist you in what you need to address for your technology needs for your transit agencies. So with that, I would like to hand it off to Kearns & West who have helped us out with this guidebook on virtual public engagement. They'll walk us through it from here.

**Joey Goldman:**  Thanks so much, Andrew. Welcome everybody. It's nice to see you all here today for a virtual engagement activity. In this case, a webinar. I'm Joey Goldman. I'm a vice president with Kearns & West. I lead our transportation practice from our San Francisco office. Today we're going to talk a little bit about the work that we've been doing. We've really enjoyed working with N-CATT and CTA staff to research and write in pretty short order, due to the urgent importance of this topic a guidebook on virtual public engagement.

Our target audience has been transit agencies, MPOs, some human service transportation organizations and other transportation organizations as well. But a lot of the information, we think, may also be valuable to other small and mid-sized organizations inside or outside of the transportation space who are trying to meet their engagement objectives virtually.

So, I'm going to introduce you to my other colleagues too. You will see them across your screen in alphabetical order. Ross Green is joining me. He's a senior associate and a strategic communications specialist who is also in our San Francisco office. Sam Ramsey is in our Washington DC office, and she represents our collaborative technologies team, which focuses on a lot of the things that we're going to be talking about today. And Kai Walcott, who's an associate in San Francisco who, like me, has a planning background, brings her experience in facilitation and design to this project.

Since we at Kearns & West specialize in collaboration on transportation projects, we're going to be very collaborative today and all four of us are going to present to you with the hope that we can offer some ideas that you can put right into practice.

On the next side will start with a quick overview of how the guidebook is sort of was conceived and how the information is presented. That's going to be the first part of our presentation today, followed by some of the key themes or takeaways from our work. We thought we would put these upfront, and these included things that we had planned originally to put into the guidebook based on our own extensive experience in this area, as well as things that we have learned through a series of mini-case studies which we'll talk about, too.

Those shed some light on how transportation organizations, many of you or your peers pivoted quickly to virtual engagement during the pandemic and some of the lessons learned there. The bulk of the guidebook itself is focused on virtual engagement practices, and we will highlight today some of the examples and recommendations that are going to be included in the guidebook, as well as to allow time for your questions and suggestions. Because this is a webinar about virtual engagement, too, we hope we can make it a little bit interactive.

We're going to be doing a little bit of polling later in the presentation. So, if you have your cell phone handy or will be able to open another window on your computer, that's going to be particularly helpful. We encourage you to use the Q and A feature here in Zoom if there are key questions or reactions to some of the questions that we're going to pose to you in a little bit. So with that, we're going to get started on our presentation.

**Ross Green:**  Joey and Andrew did a great job introducing this effort, and I'm just going to share a little bit more context about our approach in developing the guidebook itself. So, last spring, transportation agencies, and for that matter, organizations of all shapes and sizes were quickly accelerating their transition to online activities due to the COVID19 pandemic. And we shelter and place orders holding traditional in-person meetings, usually, no longer viable. And it seems like millions of us were downloading Zoom all at once.

We're almost a year now into the pandemic, and we wanted to identify best practices from across the country. and for us that particularly meant for smaller, rural and non-urban transit organizations that might not have a big budget for community engagement. Now this, of course, means facilitating and managing effective virtual meetings like on Zoom. And we'll see a little bit later how we can make those meetings more interactive. But there's so much more than that. This guidebook is really going to provide some help too and some guidelines for best practices on a wide variety of virtual engagement tactics. And we'll dig a little bit into those a little bit later. Next slide.

So, before we get too far into this, I think there are two key terms that will be helpful for us to define. The first is virtual. That one's relatively easy. By virtual, we really just mean leveraging Web-based tools and applications. So anything that's done with the help of the Internet or technology that has not done directly in person. The second is what do we mean by engagement? In this context, we're thinking about that engagement as an exchange of information between two or more parties.

So, we aren't really capturing all types of public communications. Take, for example, the traditional press release. Press release might be an effective way to broadcast your message widely, but there's not really any back and forth with the community or the public. Social media, by contrast, really helps you broadcast a message. But there's an opportunity for the public to comment on a post, send a direct message or otherwise engaged with your agency. And what does public engagement look like in this context? There's, of course, a ton of traditional tools, and we hear about what you have been working on over the past year, but that can range from public meetings or events, to surveys, to the timeless monthly newsletter.

And there are also a lot of tools in our toolbox for transitioning our work to a virtual environment. And this guidebook is really intended to help you identify the right resources and build confidence with the tools for your public engagement effort. Next slide.

We also think it be really helpful to get specific about the motivators or objectives your agency has when engaging with the public. Sure, there are many more than the three that we have here. These can actually be interconnected, depending on the effort at hand.

The first gets to the point about public communications, and that's really to inform and deliver timely, incredible information to your users and writers, to your target stakeholders and public officials and the general public.

And sometimes you want to engage and consult with the community to get their input and feedback on a transit plan or a proposal, take a ballot initiative where you need to raise fund and activate voters. Check maybe there's a change in a fair structure and you need to get community understanding for why a higher price is necessary at this time, or there's a new bus route, and you're looking to build enthusiasm about the service expansion. In any case, getting specific about your engagement objectives will help you identify the best tactic to meet your needs.

**Kai Walcott:**  Thanks Ross. So the guidebook has three major takeaways. The first is that virtual engagement provides a lot of opportunities. What we mean by that is that it encourages agencies to rethink the status quo because of its flexibility and merit of tools available to users. And it can increase the size and diversity of the audience when combined with offline approaches. It can also increase the reach and the interest among stakeholders when it's conducted in partnership with other agencies.

The guidebook also highlights that there are several tools available and approaches to virtual engagement. So, we found that transportation organizations are adapting to the pandemic in different ways and have different levels of success based on a community's needs and the agency's resources and culture. So, as there are many different tools available, agencies should consider their objectives and resources and communities needs before choosing a tool, bearing in mind that it might be helpful or is usually helpful to combine these tools and approaches.

So, basically one size doesn't fit all. Just because it has worked for another agency doesn't necessarily mean that it will work for your agency. And just because it's worked for your agency in the past doesn't really mean that it will work for your agency in the present. So, you should really think about what your agency needs are at the time and what and what the community's needs are at that time.

And lastly, as most things, limitations exist. We found that there is limited guidance for transportation organizations on virtual engagement. Hopefully, this guidebook will help. I'll set that. We also know that there are tools, not all tools provide the same level of access for all user types, and that virtual engagement is not a perfect substitute for in-person engagement. So, it doesn't map one on one, where possible hybrid approach is preferable. That uses both online and offline tools and approaches. Next slide please.

So, to inform the guidebook, the team contacted several transit agencies and organizations throughout the country to learn about their experiences before the pandemic and during the pandemic. Some of our questions included what type of engagement were you doing before this new normal? How has your agency adjusted during COVID19? Have there been any approaches that haven't worked or constraints you've identified? What advice or lessons learned could be offered to others seeking to do more in virtual engagement?

The team conducted a total of 13 interviews, and those agencies and organizations are listed on this slide. Again, we want to thank everyone who participated. We really appreciate the time you took. Yes, just thanks once again. Also, the guidebook includes examples from transit agencies and organizations that are not listed on this slide as well. If you could move to the next slide, please.

In today's presentation, we will highlight three of our case studies. Asheville Rides Transit, Miami Dade Transit Planning Organization, and Neighbor Network of Northern Nevada. You got there.

**Marcela Moreno:**  Thanks, Kai. So, the first case study that we're going to take a look at is the city of Asheville Transit department. The city of Asheville showed us the importance of refining internal capacity for virtual engagement before deploying external virtual public engagement.

So, at the start of the pandemic, Transit Department conducted an extensive internal review of virtual engagement platforms to better understand the current scope of available platforms and determine which platforms best met their internal and external engagement needs. They dedicated one staff person to a majority of this effort to meet with vendors, consult with colleagues, and just organized the general process.

Once the Transit Department confirmed their platforms, which were Google Meet for internal coordination, and publicinput.com for external engagement, they developed mandatory trainings through their IT department to ensure that all staff were capable and comfortable deploying and utilizing these platforms for virtual meetings.

Once this was done, the city of Asheville began conducting their regularly scheduled meetings with the city council and transit committees, and they also began regularly engaging with community partners again, such as the Better Buses Together, the Rotary Club of Asheville, and the City of Asheville, Multimodal Transportation Commission on current and upcoming transit policy initiatives.

The next organization we're going to take a look at is the Miami Dade Transportation Planning Organization. The Miami Dade Transportation Planning Organization showed us how creative and strategic methods can be employed to broaden stakeholder outreach and communicate important transportation planning initiatives in a fully virtual environment. The Miami Dade TPO has historically been involved with their county's Community advisory committees, which convene on a range of topics throughout the county because they understand that these communities are truly the heartbeat of the community and the county, and that these are where community leaders are most involved. S

o, when we all shifted to a virtual environment last year, the Miami Dade Transportation Planning Organization continue to coordinate with these community advisory committees to attend these virtual meetings and to also engage with the communities. In little in-person events, Miami Dade began hosting a webinar lunch series titled Taste of Transportation, which convene seven webinars throughout the counties' transportation planning areas.

This series took creativity to the next level by employing a play and work with the moderator being the master chef and offering quick taste tester presentations of current upcoming transit initiatives. They really showcased how education and entertainment could be employed for virtual engagement opportunities. Most importantly, Miami Dade showed us the importance of thinking outside of the box of traditional transit partners by continuing to form an advanced relationship with entities such as their library system, as well as the Miami Dade Police Department to explore new ways of engaging the public.

**Ross Green:**  Our third case study comes from the Tongue Twister, the neighbor network of northern Nevada, which is also called N4 to be a little bit easier. Before the COVID19 pandemic and four had planned for an in-person summit to advance their mission to connect Northern Nevada is too inclusive community based resources, including affordable transportation vouchers. And they wanted to convene at-home caregivers to share the resources that are available to them and the people that they serve, particularly those transportation vouchers. When shelter in place made an in-person summit untenable, N4 migrated to two half day virtual summits on Zoom.

And what surprised their staff was that attendance actually exceeded expectations of the in person event, even in a rural community in northern Nevada. That's because for at-home caregivers, an opportunity to connect with those doing the same work with as them without needing to leave their loved ones behind at home for an extended period of time was exactly what they needed. N4 also had success maintaining the collaborative feel that we all want out of that in-person summit or in person experience.

Breakout rooms with N4 staff and coalition volunteers to serve as facilitators provided a venue for the caregivers to chat in smaller groups about their sometimes isolating experiences, particularly during the COVID19 pandemic. Some of their lessons learned and where they would benefit from additional support from an organization like N4. Now, during these break-out sessions and afterward key takeaways would be reported out to the larger group from each session.

The lesson here, really is that the context of your audience is critical, and in some cases, the stakeholders that you're trying to reach may prefer and benefit from a virtual environment, even in a rural community. In the case of N4, what was originally planned as a one-off event, actually now has the momentum to be held several times in the future because it was more accessible for the caregivers to participate, given the nuances of their lives. It also provided a desirable venue that previously didn't exist for the caregivers to connect with one another.

**Joey Goldman:**  Ross, before we go on, there was a question about whether the N4 summit was specifically about transportation or more general to all caregiving issues.

**Ross Green:**  That's a great question. So, the summit was more broad than that. There's an entire coalition for at-home care giving support. But from N4's perspective, the access to services around transportation was the focus. And I should know we were calling these many case studies because we're just sharing a couple of snapshots and takeaways from all of them. And in the guidebook, which will be out very soon, we'll go a little bit more of a deep dive into each of these.

**Joey Goldman:**  So, there were some things that we learned through the case studies that were fairly consistent across the transportation organizations around this pivot to virtual engagement due to COVID. We know, first of all, that people are not going to school. Many of us, myself included, are working at home. Ridership has dropped dramatically on transit systems, and for a lot of the human service transportation programs. We also found out, and we know too, based on the data that's out there, most organizations had very little experience with virtual engagement prior to the pandemic.

But as I used the word, they pivoted quickly to virtual, it wasn't always a seamless transition for a lot of them. Some of those which ultimately felt that they were fairly successful, tested a few different types of software to find what they thought were the most accessible or tried other ways to reach communities on the other side of the digital divide. And we can talk about some examples of that as well. Although, almost universally these case studies highlighted that engagement approaches have shifted during the pandemic, we know that, but they also pointed to the fact that the ways transportation organizations are most successful in sharing information with hard to reach communities is mostly unchanged from before the pandemic to now.

And that's been by working closely with partners, so through partnerships and working with the networks of these organizations. When the pandemic ends, we're all helping or moving towards that. It's probably not going to be back to the way things used to be. Most of the organizations are seeing some value in virtual participation as an option. And in all of our interviews, really, they said that they do see hybrid meetings as being something that will be carried forward once people can gather in person as well.

On the next slide, we thought we might be able to address some clear conclusions from our interviews, that turned out not to be the case in all areas. You can see some positive feedback and some sort of challenges that organizations faced. And this is what we heard from all of the books that we talked about. Among the advantages, I guess the virtual engagement virtual meetings remove some barriers, particularly travel, time physical transportation, to get to the meeting. And that in itself makes them more accessible.

But on the other hand, these are approximated quotes, the virtual space inherently limits inclusion because it's difficult to reach people who don't have access to or knowledge of using the Internet or the phone using data or using WiFi. And here I think it's important to make a point about accessibility features of some virtual engagement tools, something that works well for one group might not for another group. It seems to really differ from tool to tool. And shopping around for the right combination of tools is appropriate, depending on your audience.

There is some nice collaborative whiteboarding software that is really not easily accessible for people with visual impairments. Remote audio connections, many of them have close captioning, but if they don't, they're not useful for people who are deaf or have hearing loss. Some tools have a steep learning curve. I think we're in a period where technology providers and organizations who are using these tools are starting to figure out what's going to work better for the audience is that they are trying to work with and use sort of a menu of different options and reaching out to the people that they want to engage.

A couple more points on this slide, moving meetings online has resulted in higher participation overall. We heard that from a lot of folks. More people are joining online than they did in person. At same time, we also heard people are experiencing Zoom fatigue. I think I will confess that I feel that way at the end of eight hours of Zoom meetings. Participation is dropping because of that. So, that would be something that we will be interested in continuing monitoring as more virtual engagement takes place.

Third row here, I think, is worth highlighting. Virtual engagement is more efficient because meetings are easier to manage and they end on time. Somebody said, it's so nice you just click mute if somebody is out of line and you can move on to the next point. But at the same time, we heard from a few folks, virtual meetings seemed to take longer. Introductions are a little more cumbersome. And people feel like they need to voiced their opinions. Those visual cues that one might get in a room of just shaking your head, that doesn't come across necessarily in virtual engagement.

**Ross Green:**  Thanks, Joey. Just to elaborate a little bit more on some of the challenges and opportunities and things that we've seen when it comes to virtual public engagement. For challenges, I think this could really boil down to a conversation about capacity. And that's both internal to the agency or organization and external to the communities you serve. Internally, identifying the right tool to meet your needs might feel overwhelming in and of itself. There's so many software applications that are out there and available. But even once you do identify the right technology, the right tool, the cost of software acquisition and the training time it might require to get your staff feeling confident with the technology tool can be cumbersome as well. And that's something we've heard from a lot of folks.

Externally, agencies, Joey mentioned the Digital Vibe, but agencies really should be aware of the dynamics surrounding the communities that they serve. So, if we take the digital [Inaudible 00:27:22] divide, it might mean that you doing virtual meetings exclusively, especially as we emerge from the pandemic, might not be the right fit just because your constituents might not have reliable access to the Internet.

Meanwhile, demographics add another wrinkle. And so there might actually be a lack of confidence or skills with some of the constituents that you're working with for certain virtual tools. And these are all things that we dig a little bit more into in the guidebook, and how do you sort of navigate those challenges? None of this, however, should really take away from the real opportunities that we've been seeing in cases across the country. Joey hit on this, but a big one is really time and cost savings. So, if we take this meeting, for example, it was way easier, Andrew did a lot of the coordinating. But it was way easier to pull together a 100 peers from transit agencies across the country into a one hour webinar, whereas in the past we might have imagined taking several months to put together an in-person event where we have to identify the right place on the map that we could get the most amount of people for a weekend or weekday conference. What this means in practice is that you have both agreed to reach. So, more people are able to just dial into a Zoom meeting or a webinar. That also could mean more frequent touchpoints with the community.

And one thing that we explore a lot in the guidebook is sort of the new powers that we have at agencies to really provide accessible services for your public engagement activities. So, we talked a little bit about close captioning services, translation tools, all of those things. Some might be more important than another, depending on the community that you serve. That's why I sort of identifying and sticking to when in some cases, the technology that really hits the sweet spot for you is important.

Talked a little bit about how it might feel overwhelming to identify the right technology but at the end of the day, you know meetings and events can be sort of the bread and butter of public agencies, engagement activities. There are still so many options to choose from. So, that's why a lot of the focus of our guidebook is really about helping you identify the right types of virtual events to meet your objectives. So, for example, this is in the form of the webinar. Sometimes it might make sense to be in a different type of format as a hybrid or virtual meeting itself. There’s exploration of how to make these more interactive, which will show in real-time an example of that in just a moment. In some cases, meeting or a real time meeting might not be the best option that's available to you.

**Kai Walcott:**  The guidebook also outlines best practices for planning and executing effective virtual meetings and events. We grouped them into four categories promoting engagement, facilitation techniques, meeting execution tips, and how to solicit feedback. For promoting engagement as we have stated several times today, not all groups have the same level of access to or experience with all technologies and tools. It's really important to consider the needs of different groups within your target audience on when promoting an event. This includes assessing community resources and capacity using multiple methods to distribute invitations and ensuring accessibility compliance.

This could take the form of providing stakeholders with instructions on how to access online meetings or continuing to employ traditional approaches to outreach, like distributing printed materials and calling stakeholders to encourage participation, and then also providing translated materials and finally remediated materials. Again, whatever method is used to be base on an understanding of the audience and their needs. For example, a staff at TCAT, Tompkins Consolidated Area Transit in upstate New York found that a simple phone call to stakeholders was much more effective than sending emails because they were able to hold their stakeholders attention for longer but also the stakeholders felt it showed that they expressed a clear interest in reaching out to the stakeholders and connecting to them in a more personal one on one kind of way.

Next slide, please. Also, facilitation techniques for virtual engagement and effective engagement effort is essentially one that achieves the objective as smoothly as possible and so before conducting an event, it's important to define the meeting objectives and desired outcomes. That's essentially why you want to host the event in the first place, what information you hope to learn or what information you hope to share. Once you've answered that or once you've clearly stated your objectives, you can design the meeting format with those objectives in mind. You're thinking about the type of platform you want to host the event on. What activities you'd like to do with your participants? Once you address those questions then you can create a facilitation plan, which basically outlines the components of the meeting and flashes out the challenges that you may face in the meeting or allowing you to create contingencies.

For example, the other day I participated in a meeting and the facilitation plan was really detailed because we're unfamiliar with the software and so we ensure that we have instructions on how to use the software. We also provided like an annotated agenda so that we knew when we needed to transition screens from one person to another. We also made sure that there was a list of webinar links that we thought would be important to share with participants as we went through the webinar. The facilitation plan is essentially, it can be as detailed or as high level, as you needed it to be. It's really just how comfortable you are with the platform and the materials being shared. It just helps you be better prepared for the meeting.

You can also define and confirm the project teams rules and responsibilities. This is basically who will lead the event and who will facilitate the event, who will manage the webinar, and who will provide technology support or just general support. For smaller events, one person could have multiple roles, but for a larger event, it's probably best to have one person or clearly define the rules for each team member. Finally, it's great to create and enforce participation guidelines. That's essentially ensuring that participants and hosts are on the same page on expectations for interactions. These guidelines can vary depending on the type of meeting, on the number of members, and also the familiarity among members. It's really important to understand what you wish to gain from the event and design the experience around that.

**Samantha Ramsey:**  Thanks Kai. Next we're going to talk about meeting execution tips. There are many best practices and tips that you can employ to successfully execute a meeting but it's important to remember that all of the tips and best practices you use are dependent on the meeting structure itself, the platform that you're using, the structure of the meeting room and the desired outcomes of your meetings. These are just a few best practices that our guidebook recommends. Firstly, join the meeting early. You want to do this to sort out any kinks and ensure that folks are able to get connected properly and you're able to connect with participants to address any technical issues or needs ahead of the start of the meeting.

Next, explore the webinar security settings of the platform that you're using. This will help you understand how you can best secure the meeting to your needs that help prevent Zoombombing or help prevent participants sharing their screen unwantedly. All of that. Next, we recommend that you use instant messaging to coordinate with the other meeting host outside of the room about presentation timing, technical challenges, and other coordination topics. You also want to make the meeting materials available to the public for those who weren't able to participate in the meeting real time. Lastly, offer any technical support, responsive technical support during the meeting to participants to help maximize the user experience, proactively address needs with participants and ensure that they have an enjoyable experience during your meeting.

Next, we'll look at how to solicit feedback during a virtual meeting. Again as I said for the last slide, this is fully dependent on the platform that you're using and the desired outcomes of your meeting. First tip is that you can encourage participants to use reactions or emoticons throughout the meeting to reflect their feelings. They can sometimes use an emoticon to say that they want to take a break, that they want the presenter to go slower or faster, and that they agree or disagree with the content that's being shared. You can also incorporate polling to solicit feedback during the meeting on specific questions. Generally, this can be incorporated into the meeting itself. For example, Zoom has polling software incorporated within the webinar that you can use or as you'll see in a couple of minutes, we're going to incorporate an external polling platform that participants can respond to.

You can also encourage participants to use a discussion cue to help moderate the discussion. This is dependent I think on your understanding of the audience and the audience size. For example, if you have a meeting with 50 participants and it's a more formal meeting, you might want to employ a discussion cue so that participants can raise hands. They'll be entered into a queue in which the order that their hand was raised and you can specifically call on people to have them enter the queue. If you're convening a smaller focus group that meets regularly employing a discussion cue and the raised hand feature might not be necessary because it's a more informal discussion. There's usually a chat pod within your webinar meeting rooms that you can employ for participants to ask questions, engage with one another, and initiate a dialogue about the conversation or topic that you're presenting about.

You can also consider employing consensus building and ideation tools into your virtual meeting. This can look like annotation tools where participants can collaboratively work on documents in real time. Or it can also be a virtual white boarding tool, which allows participants to draw, highlight, or write on a blank surface together. Next we're going to turn to the poll that we've been alluding to throughout this meeting. We will have a two-question poll that participants can respond to. You will see at the top of the screen is a URL that you can use through your phone or Internet browser to access the poll. Or you can use your phone to text KW Poll 1222333 to respond to the poll via text message. As you see on the screen, this first question is a word cloud. If you are sending multiple words, please use an underscore to connect the words in the word cloud. I am asking you in no more than two words, please describe how you have solicited feedback during a virtual meeting.

Great. The webinar is popping up a lot, raising the hand. You are also welcome to throw polling responses into the chat box as well. See, we have breakout rooms, Bang the Table, the tool we highlight within the guidebook. This is great. All right. In the interest of time, we are going to move to our next question, which is a multiple-choice question. This is going to ask participants, which virtual engagement tools have you used before outside of virtual meeting. We know that virtual meetings is a really popular way to engage folks but are there any other that you have found, any other virtual engagement method that you have found to be really helpful within your virtual engagement experiences

If you have used a virtual engagement tool that is not on this list, throw it into the Q&A response so we can hear what you've been using. If you're using your phone to respond to the poll send one letter at a time, but you can respond with multiple answers. We are seeing fact sheets and surveys and questionnaires as really popular methods for engaging the public. Digital newsletters, online mapping, and social media have also been very popular as well. Excellent. Well, I'm going to turn it over to Joey now to present a little bit more on virtual engagement strategies that you can employ outside of virtual meetings.

**Joey Goldman:**  This is fun to watch and it's fun to use in a meeting. I think we're on the next slide actually. We missed a person.

**Samantha Ramsey:**  Yeah. I could just quickly jump in to say the guidebook provides how-to guides on this list of engagement activities that are not virtual meetings and some of which you all have already done or used before in the past. The how-to guides essentially provide a stepwise information on development notes on best practices, tools and considerations like relative costs, staff time and ideas for improving accessibility and again, we stress combining these tools to create a more robust approach. Go ahead Joey.

**Joey Goldman:**  Now it's clear that some of our preparation could have been better, I guess. There are also many different tools and applications that the guidebook describes. It gives cost ranges for, suggest uses for, gives examples of specific ones without endorsing particular products. I've noticed we haven't had a chance to respond to some of the questions that are coming in about accessibility features, and then we can talk further about that during Q&A. We are not documenting on a tool-by-tool basis the specific accessibility features of each one of these, but I think that's where it's been kind of a learning curve for organizations trying to find the one that works best for their communities.

The focus here for transportation organizations is how can they ideally package more than a single tool to offer participants different avenues to engage, whether it's through webinars and virtual meetings or other types of virtual events, live streaming, in person or other types of events? Scheduling software tools like Doodle, many of us use that. There are surveys and polls, like we just saw responsive email marketing, creating special project websites. For example, those of us who are working on the high-speed rail project in Northern California. We created a virtual open house for that program and had more than 20,000 visitors check out the information that was available, and we would never have received that level of engagement prior to that when we were doing in-person open houses, and also more robust use of social media, digital collaboration tools like white boarding or sticky notes. You see here an example, using mural as well as other planning and mapping tools. To wrap things up, where does this all get us?

Let me have a few concluding points based on the guidance, and then we can move on to your questions. Just in summary it is especially helpful what we've discovered and based on our practice, we know to understand what you are trying to accomplish. What are your engagement objectives? Who do you want to engage? What are you trying to solve? What type of feedback is needed? How can we work with local organizations to meet their needs and to best reach out to their participants? Understanding different meeting and event types can help an organization match really the right approach or mix of approaches to a single objective. Not all virtual engagement tools are going to be right for all organizations. A lot of tools offer free trials and that is a nice way to test some of the technologies to find the right ones for your organization. We do again in the guidebook highlights some examples of costs and where some tools might be free on a limited basis as an example.

One of the most disheartening things I think for those of us who are passionate about engagement when we see everything virtual that it's not necessarily going to be easy to engage certain populations. It could be particularly challenging. It's important to acknowledge that inequities exist and then try to address them to the best of your ability. It is also important to acknowledge that virtual engagement is not always a good substitute for in-person meetings and events depending on the topics or the populations you seek to engage. One of the key studies that we do highlight on, I think Stella you’re on this call from Flagstaff, Arizona. We're trying to reach people who are un-housed or who are homeless.

It's really challenging to do that virtually and that’s an opportunity where the transit agency there went and met with people in person in a socially distant and presumably safe atmosphere to do that. Just to wrap up here. Success comes from preparation and practice. We say practice and practice and practice. There are times when we've been planning virtual meetings and we've held up to three or four practice sessions with technical specialists who may not be familiar with the tools or the software.

Finally, I think the next big thing is to consider hybrid engagement and some low tech options that may go along with that, that is setting up office hours making and following up through telephone calls with mailing information that has been a really, really important tool for people who have had very limited access to some of the virtual engagement tools. In conclusion, we want to thank you for hearing our presentation. This guidebook is in its final stretch. We've been working on it just since the end of 2020. It’s a quick turn project as I mentioned, but it will be up on the NC A&T website when it's completed. Andrew, we think that should probably be around sometime in April as my guess.

**Andrew Carpenter:**  Yes. We are hoping end of March or beginning of April. It has to go through a few rounds of review first but once that is done, and then it will be up. It will be in the Tech University section of our website. We will make sure to put that on, put that out on our social media and our newsletter, and make sure you're aware of it when it's out there. Also, I want to thank Joey, Kai, Sam and Ross for all of their work. It was quite the crunch to put all of this together in a relatively short amount of time. It's been good to get to watch this process unfold.

**Joey Goldman:**  I know we had a few other questions come in. I just want to make sure that people recognize that we're trying to address them. I saw the questions about from Rachel about collaborative platforms that are more accessible, accessibility friendly for people with disabilities than others. We do have that information that we are including in the guidebook where organizations have reported that we decided to not consciously serve as a Consumer Reports panel with respect to specific tools here. We didn't evaluate different platforms for their accessibility features because recognizing that there are going to be different types of features, whether that is the ease of using an American sign language translator, interpreter in the corner.

There are lots of different features that different tools have. Some are going work better for one organization than for another. I know I will just note on the many summaries you ask. How many have used virtual visualization tools? Many of the larger organizations in this case indicated that they had used interactive maps. Some of the smaller ones were less accustomed to using this but we have identified some of the mapping tools as an example that have been very helpful for some organizations and highlighted some of the transit agencies, for example, who have been pretty active on social media and have found that to be a really solid way to engage with their consumers as well.

**Andrew Carpenter:**  Okay, then let's see. If anyone else has any questions, feel free to keep putting them into the Q&A. I know that one we had earlier when we were chatting before this began was, I think you kind of touched on this a little bit but what do you see as the future of public engagement in general and what tech might be involved in that?

**Joey Goldman:**  I'm happy to start us off if anyone else wants to add to what I say. I think virtual engagement is here to stay. I think people have found that it fills in a lot of gaps that they were otherwise not able to fill before. I think this type of platform Zoom is probably forever and maybe there will be ways that we can get through our Zoom fatigue in the future that we haven't discovered yet. I do think it maybe related to the fact that hybrid meetings do seem to be something that people understand but that people do understand the value of in-person engagement in so many ways. What we are missing by not being able to engage face to face and collaborate on projects in rooms. It does feel, however, that people are recognizing that there are still a lot of benefits for bringing people in who can't be there in person, particularly some of the examples that we've gotten from. Ross talked about the one in Nevada.

There are other examples of caregivers or people. It could be just a parent who has a child at home who is unable to go to a meeting because it's difficult to leave your child and travel to a meeting. The flexibility that many of us are enjoying, I guess in working from home whether we enjoy that or not, is something that does allow us to participate in virtual events moving forward. I do think that there are more apps that will be used as different tools to reach more groups moving forward. They're coming on the market on a regular basis and many of the major software tools like Zoom as an example have integrated tools that are otherwise available in stand-alone apps like whiteboarding and polling as well as several tools have speech recognition based close captioning, which has been particularly valuable for a number of populations.

With regard to that, I do hope that the tech platforms will become more accessible. I think a lot of them move things out quickly, and as people were lapping them up in any way, they could but it does seem that we're seeing new accessibility features being built in two different versions of some of the tools that we've been using for a long time as well.

**Ross Green:**  Okay, I would just add one side. We didn't talk a ton about community partners and how important they are in terms of getting the hard to reach constituents to be involved in your engagement effort. We talked a lot about the workforce environment, the fact that the pandemic has gone on for so many months. There's this new normalcy of working in a virtual world. We are also finding that's true with the community partner organizations. Sometimes the smaller nonprofit groups they have, by necessity, really had to build their capacity. Our hope is that it remains sticky and that there's kind of the continuation for smaller community groups, staying online, being online and able to reach their constituents or their community members online.

**Andrew Carpenter:**  Excellent. I know I already learned about a few new tools that have come out since starting to work with this team on this guidebook. There's always something new and I do think that they will be very helpful for putting these engagement efforts together. I think it looks like there's time for one more question. Rachel has asked, how are the case studies chosen? I think I saw Kai, you were typing an answer but if anyone wants to grab that one.

**Joey Goldman:**  I can jump in here. I don't know if you fully responded Kai but if you want to-

**Kai Walcott:**  Oh, I haven't responded yet.

**Joey Goldman:**  Okay. I just wanted to confirm. We dug in based on some literature review that we did initially to understand what organizations we are doing out there. We received a lot of suggestions from our friends at TTAA who encourage us to reach out to some of their partners who they were aware are doing some really innovative things, particularly on the human service transportation side and reached out to those as well. We also received some referrals from some of the people that we spoke with who offered examples that they thought were good models to be shared with other transportation organizations.

We did seek geographic diversity across the country, and we did seek to include transit agencies, NPOs, and human service transportation providers or mobility management focused organizations as well. I think it's fair to say that this is an early, quick like let's get the information out there. I think there will be some really great examples that will be revealed over the next several months as well as people still kind of build up their capacity to reach their communities virtually. We hope that at some point there could be some updates to this to highlight some really exemplary practices that may have been missed given the approach that we have to take to move this thing fairly quickly.

**Andrew Carpenter:**  One of our goals is to definitely revisit this fairly regularly so that we can update it with new practices and new tools that may have come in anything like that. It looks like we can squeeze in another question. From Elena, do you have suggestions for facilitating consensus discussions or other more robust engagement and decision making?

**Ross Green:**  I can just jump in with one experience from other work, and that has been the value of virtual collaboration technology. We showed an example of mapping earlier, but there are also collaboration tools. There's a lot out there that are available out there in the market that sounds almost the same as mineral and mural. Those were fantastic, particularly from a facilitation point of view, because once a community member or a member on its advisory panel, they can see their comment reflected in real time. In facilitating meetings in the past, then you might have hear a lot sort of the same comment that comes up over and over again having it on a screen share and virtual collaboration, capacity folks were able to sort of see their comments reflected in real time. They can add a check and mark a plus one to that. That's one thing that I've seen that has been effective.

**Joey Goldman:**  People have really embraced the breakout rooms of all of the software that offers that as a tool to: a) sort people into different language groups where they can have a dialogue in language if necessary. It's hard in a virtual setting to sort of work on complex discussion and decision making efforts when you have a lot of people around the table. That's something that most of the people that we talked to agreed that they have used in one capacity or another and again, that's become more robust in a lot of software tools allowing you to assign people or allowing people to select their own breakout rooms based on their interests. Making use of some of the tools that are there along with just really good facilitation and decision-making practices I think would be another piece to add to that.

**Andrew Carpenter:**  Excellent. Thank you all. We are right at four o'clock Eastern time. I think that's a great stopping point. Just to let everyone who's on know, we will post this recording in the next couple of days, and we'll also put up the slides so you can just go through the slides themselves and then also a transcript of this so you can read through this if you need to which is just how we put up every webinar so that there are different ways of interacting with the information. Of course, feel free to reach out to Marcella or myself if you have any follow-up questions or need any other information. We will be happy to connect you to the information that you need.

Again thanks to the folks from Kearns and West for your work on the guidebook in general and for this webinar today. Thank you all for joining us. It's great to be back on the webinar circuit. It looks like we get to interact with everyone else soon. Have a lovely day everyone, and we will be in touch. Thank you.