



CRC for
Water Sensitive Cities



Tips for virtual engagement



Australian Government
Department of Industry,
Innovation and Science

Business

Cooperative Research
Centres Programme

Tips for virtual engagement

Version 1

This document was updated on 3 November 2020.

© 2020 Cooperative Research Centre for Water Sensitive Cities Ltd.

This work is copyright. Apart from any use permitted under the Copyright Act 1968, no part of it may be reproduced by any process without written permission from the publisher. Requests and inquiries concerning reproduction rights should be directed to the publisher.

Publisher

Cooperative Research Centre for Water Sensitive Cities
PO Box 8000
Monash University LPO
Clayton, VIC 3800

e. admin@crcwsc.org.au

w. www.watersensitivecities.org.au

Date of publication: November 2020

An appropriate citation for this document is:

CRCWSC, 2020, *Tips for virtual engagement*, Melbourne, Australia: Cooperative Research Centre for Water Sensitive Cities

Disclaimer

The CRC for Water Sensitive Cities has endeavoured to ensure that all information in this publication is correct. It makes no warranty with regard to the accuracy of the information provided and will not be liable if the information is inaccurate, incomplete or out of date nor be liable for any direct or indirect damages arising from its use. The contents of this publication should not be used as a substitute for seeking independent professional advice.

Contents

Contents	3
Embracing virtual engagement	4
Aims	4
Building on practical experience	5
Lessons about stakeholder collaboration	5
Lessons about community engagement.....	5
Some other things we've learned.....	6
Tips for virtual engagements	7
General tips	7
Tips for virtual process design	8
Tips for virtual facilitators	9
Technology tips	10
Which software platform to use?.....	14
References	16

Embracing virtual engagement

2020 has been the year of virtual meetings and workshops. Many have embraced this new form of working, but experiences have been mixed: we are collectively recognising that virtual engagement is hard work for hosts, presenters and audiences alike.

In this document, we show how to approach online engagements in a smarter way. It draws upon the CRC for Water Sensitive Cities (CRCWSC) experience and research into collaborative processes and tools. It is not a guide on technology platforms. It is a summary of the things we've learnt about good engagement processes pre-COVID, and how these principles translate to virtual engagement.

This document is a collective resource to grow as the CRCWSC community builds its experience in delivering online training, webinars, workshops and other virtual engagements.

We invite further ideas, lessons, tips and links to resources so that we can learn together as we develop online versions of the water sector's collaborative and learning activities.

Feel free to contribute in any way – small tips, additional tools, new sections, new formats. It is our shared resource that will continue to grow.

Aims

1. Make virtual workshops (etc.) more engaging for participants
2. Make virtual workshops less stressful for host and facilitators
3. Make virtual methods a legitimate and effective tool for stakeholder engagement.



Building on practical experience

This section provides selected insights on engagement practices that we have found are important in conventional, face-to-face stakeholder engagements. Getting these 'basics' right sets us up for effective virtual engagement.

Lessons about stakeholder collaboration

By participating in processes such as the Brabham Action Learning Project (Tawfik et. al. 2020) the CRCWSC has learnt a lot about collaboration. Six lessons emerged that are transferable to other collaborative projects:

1. **Diagnose your context:** Understanding context helps you set up a collaboration in a way that encourages greater participation and fosters ongoing commitment. This includes understanding how external operating conditions may influence the appetite for collaboration. Understanding the context also helps to clearly define the problem being discussed.
2. **Develop and align goals:** Establish shared goals and expectations for the collaboration, including what will (and will not) be discussed. In other words, each stakeholder must have a clear advantage to gain from collaboration, which they could not achieve alone. But it is also important for collaborative processes to recognise and manage all the different drivers so that no individual agenda dominates.
3. **Get broad stakeholder representation:** Appropriate representation will broaden the group's understanding of different perspectives.
4. **Create safe spaces for interaction:** Design collaborative platforms that enable honest and meaningful discussions and build relationships. This requires interactions that foster trust and respect, inclusive language, and independent facilitators to lead the collaboration.
5. **Have a clear process and agenda:** Each stage of the agenda or process should have a specific purpose, connected to the collaboration's overarching goal. As the collaboration progresses, demonstrate how the group is progressing against these goals.

Lessons about community engagement

Through other research activities, we have identified principles to help the water sector engage with their local communities. These principles emphasise the benefits of engaging through place and the importance of diverse perspectives. The principles are documented in *Principles for engaging communities in water sensitive city transitions* (Rogers et.al. 2020). Selected principles are presented below under three themes:

Framing

1. **Establish a clear scope:** Communicate the scope of the engagement process, such as who is being asked to participate, what agenda or issue is being influenced, and how the engagement will inform planning.
2. **Ground discussions in local values/context:** Relate the content and process to the community's local and historical context to make it relevant for participants.

Participation

1. **Develop participants' capacity to participate:** Provide opportunities for participants to learn about the issues being considered, so they can contribute more effectively.
2. **Be inclusive:** Mix up your engagement activities so that different segments of the community can participate in the process.
3. **Foster openness and trust:** Be a neutral facilitator. Create space for discussions by holding space for the process and allowing others to fill this space with content.
4. **Build ownership of the process:** Consider longer engagements that create a two-way opportunity for learning, iteration and refinement.
5. **Leave them with meaningful actions:** Arrive at tangible outcomes that empower the community.

Translation

1. **Present content in ways that resonate:** Use a variety of methods to represent and translate content so it resonates with a broad, general audience.

Some other things we've learned

Other, general lessons about engagement have emerged from our day-to-day practice:

- **Recognise the power in connecting people who would not otherwise work together.** At the CRCWSC, we focus on connecting researchers with industry partners, and industry partners with each other. The lesson about creating new connections is broadly transferable.
- **Ensure participants leave with a commonly agreed set of key messages.** This could be achieved by creating a tangible output. Alternatively, allow time towards the end of the process to discuss and agree key messages about the engagement before people leave.
- **Actively encourage diversity of opinions and allow these opinions to shape the discussion.** Create space for quieter, divergent voices to avoid slipping into group think
- **Use visual thinking techniques** to help participants explore complex ideas, and to be creative in shaping solutions. Create artefacts of these workshop tasks to sign-post progress. Put these up for all to see.
- **Use small group work** to maximise the face-to-face discussion and deeper conversations between participants.
- **Regularly check the level of engagement.** Adapt your process or delivery if engagement or energy levels are low.
- **Check in with participants** during the session and use feedback after the session to improve the process next time.

Tips for virtual engagements

This section translates the lessons from face-to-face engagement for a virtual environment.

General tips

- **Pick the right (virtual) process for the job.** Be clear about purpose of the engagement. Then choose the most appropriate virtual process and platform.
- **Two jobs, two roles.** Consider including a technical moderator to run the software, click the buttons, switch screens, so the facilitator can focus on facilitating the conversation. Let your audience know the technical moderator will be available five minutes before the session starts to support anyone not familiar with using the online engagement tool.
- **Maintain the human connection.** If sharing the screen for a presentation, switch between that and your face to keep people engaged.
- **Make the content easily digestible.** Consider accessibility issues (e.g. if people need to read through documents/slides at their own pace). Ensure documents and slides are circulated and accessible, and that meetings are recorded (with permission) for later reference.
- **Consider privacy issues.** If recording the session, you must notify participants at the start of the session.
- **Identify ways in which your participants might be distracted.** Are participants in different time zones? What times fit best around childcare/home schooling duties? Avoid school break times. Do they have different IT literacy levels, or IT infrastructure limitations? How might this affect the design of the engagement?



Tips for virtual process design

The virtual process is a mix of engagement process (How will participants contribute to discussion and collectively shape the ideas?), and delivery processes (How will the discussions and activities take place? How will information be shared?)

When designing your virtual process, put yourself in the participants' shoes and ask:

- **Is a single, long workshop needed?** Virtual engagements should generally be shorter than equivalent face-to-face meetings. This is because participants find virtual meetings mentally taxing and hard to hold concentration for long periods. As a rule of thumb, halve the length of virtual workshops (compared with a traditional delivery format).
- **Is there a role for pre- or post-work in contributing to the discussion?** Can any content be pre-recorded and shared beforehand? Which activities must be done simultaneously, and which can be completed by smaller groups or after the workshop (e.g. within a week)?
- **Are there opportunities in the process for participants to engage in social acts of learning, ideation and dialogue then withdraw for deliberation?** Your process might use live, two-way dialogue when that is most effective, and in-your-own time activities such as looking, reading, writing, choosing, experimenting and talking with others when that's best, before coming back to the on line platform.
- **How will participants see and contribute to common/shared workshop materials?** Do they need a lesson in the technology to be used? Have you assumed that everyone is joining the workshop using a similar type of device?
- **How will participants process the content that is provided?** We interpret information in social contexts, and in a virtual collaborative process we need to purposefully create spaces that enable this.
- **Where might participants drop out of the process?** Avoid or minimise participants having to swap and change between online tools for the workshop. Make the process as simple to follow as possible with as few different tools as possible.
- **Are you actively encouraging audience participation and making the engagement be fun?** Can you include a poll, quiz or creative task? Try to mix it up with new ways to make your virtual meetings even more engaging than face-to-face ones.
- **Have you allowed regular breaks?** A good rule of thumb is a 10-minute break in every hour. Try to avoid one person talking to a presentation for more than 10 minutes. According to the [University of Colorado](#), hourly five-minute walking breaks boost energy, sharpen focus, improve mood and reduce feelings of fatigue in the afternoon far more effectively than one 30-minute break.



Image credit – Monash Generator

Tips for virtual facilitators

As with face-to-face engagements, the role of facilitator is key. Here are some tips to think about in a virtual workshop:

- **Be clear on your agenda, timings and breaks.**
- **Have participants introduce themselves** so that everyone knows who is online. Drop pins on a map showing where each participant is. Another option is to produce a slide with participants' organisation's logos. Foster a sense of group identity by sharing what each member of the group has in common, or undertaking a simple task together as a group in the early stages of the engagement.
- Think about how you will **monitor energy levels** amongst by participants. How will you read body language so you can tell when participants are tired or distracted? Ask participants to keep their cameras on to maintain accountability for active listening and participation. Encourage your audience to 'be in the meeting' – no driving, washing dishes, or doing something that you would not normally do during a physical meeting.
- **Make sure everyone is on the same page.** As facilitator, regularly summarise things presented (e.g. via shared PowerPoint screen) or agreed (through chat functions). Also make it clear what questions are being discussed and even give a heads up before the meeting via the agenda on what questions will be discussed.

- **Keep participants 'hooked'.** 'Hooks' are the mini breaks that bring you back to the moment and engage the brain's executive functions. A hook follows three principles: it triggers an emotion (e.g. narratives that trigger fear, laughter or incredulity), it is relevant to the content (as opposed to a random joke dropped in), and it appears every 10 minutes – either ending content that has just been covered or providing the bridge to the content that will follow. Given we are exposed to more distractions while working from home, aim to use a hook every 5–7 minutes.
- **Ask all participants to be on mute unless they are speaking, to minimise audio disruptions.**
- **Assume the bandwidth will be poor and that some participants will not be able to see the presentation** – read aloud what is on the slides.
- **Remember the social etiquette of speaking up is different in an online meeting.** It is harder to interrupt someone who is already speaking. Similarly, if you are presenting it can be hard to see when someone wants to contribute. To address this, pause more frequently and for longer periods to create space time for participants to ask questions.
- **Ask permission to share contact details of participants**, since people will not be able to follow up on questions/opportunities after the meeting is over (e.g. on lunch break).

Technology tips

Network connectivity






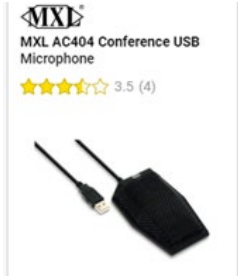
- **Where possible, use a cabled connection for online activities, particularly if sharing screens or using audio.**
- **Check your computer has networking capability.** Newer laptops do not typically have a network port so you will need a dongle, dock or adapter (these names are interchangeable). Needs depend on the types of 'ports' available; e.g. your laptop may have one USB-2 port, and 2 USB-C ports available.
- **If you are host, have a backup internet option** such as a wireless 4G device or hotspot on your phone. There is time to switch over, but it is better to have these available in case you lose your main connection.

Your work-from-home kit

Check you have these items on hand before you start your virtual engagement:

- Ethernet cable
- A quality headset with a quality microphone and speaker buds (see below for some options). If you do not like headsets, consider an external speaker and microphone (see examples below).

- An internet router. If you are sharing with others in the house, you can apply parent rules via the technology or command style. If needed, you can set your Quality of Service (QoS) setting to give your machine priority. If you need help setting this up, use the online help for your brand of equipment.
- An external camera and microphone, if your internal camera is not good quality or hard to position. (For example, this Logitech product includes a high-quality microphone in the camera: <https://www.logitech.com/en-au/product/hd-pro-webcam-c920>.)

 <p>USB-2 Network adapter</p>	 <p>Adapter and ethernet cable, other end goes into the router. Turn WIFI off when using cable (especially on a Mac because it confuses the system)</p>	 <p>USB-C doc</p> <ul style="list-style-type: none"> • 2 display ports • a network port • 2 USB-2 ports • Power port – USB-C
 <p>Backup internet. You can also hotspot from your phone</p>	 <p>Speaker</p>	 <p>Microphone</p>
<p>Headsets – consider Sennheiser or JBL. The Sennheiser headset has noise limiting capabilities.</p> <p>Perhaps avoid air buds or Bluetooth headsets because it is one more transmitter that can glitch or batteries may run out.</p>		

Composition, background and sound tips

- View the composition from your camera's perspective.
- Keep the space uncluttered so there is no distraction from the speaker.
- Position your camera/laptop so that windows/sun are behind it.
- Make sure you are in the shot, not just your forehead or chin. If you are too close to the camera, the audience will see only your face. For conversations and engagement try to sit back a little bit.
- Be mindful of what your face and body say while you are listening. You will likely be sitting down, but being able to see what your body expresses is one of the things we take for granted (<https://elearningindustry.com/online-body-language-learner-engagement>.)
- Choose a photo of you that looks natural and listening for your profile, so if your video is off due to bandwidth issues, 'you' are still present, not your initials.
- If you're using a virtual background, make sure that your computer can handle it without the fuzz and that it looks natural. And remember, a virtual background can be distracting. It may be appropriate for a team meeting, but not for more formal engagements.
- Audio is most important – people can live with poor video. Test sound and microphone features before every session, rather than adjust during a meeting or session.

Remember, run some practice sessions to find your best settings before you start an important engagement.

Are you pre-recording video content?

Sometimes it is a good idea to pre-record your content. This allows you to do multiple 'takes' in case you make a mistake. It also allows you to edit it before you publish it. If you are a novice at this, these tips might help:

- Gear
 - Audio is most important. People can live with poor video.
 - Phone video is better than GoPro.
 - It is best to use a noise cancelling microphone. For instance a Plantronics Legend (about \$130)
 - You should also use an app to take input from external microphone, such as the Filmic Pro app,
 - Use a phone tripod as well as phone grip
 - Have a phone powerbank with you.
- Pre-filming
 - Think about the location. Where will you film?
 - Write out commentary notes for each shot; what questions will you ask?

- What is different focus between different shots?
- Filming
 - Position your subject properly in the video frame. Google 'rule of thirds' to find out more.
 - Interviewing
 - Check the audio is ok
 - Move away from bright backgrounds
 - Check the video focus.
 - Pre-flight checklist
 - Are your batteries fully charged?
 - Record 10 seconds of video and sound, and replay before leaving for the field/site
 - Record 10 seconds of video and sound and replay before each shot
 - Take a few extra clips of ambient sound
- Post filming
 - Upload all clips into iMovie or similar. iMovie is easy to use program allows you to insert and rearrange short clips and interviews to create a single video.

Which software platform to use?

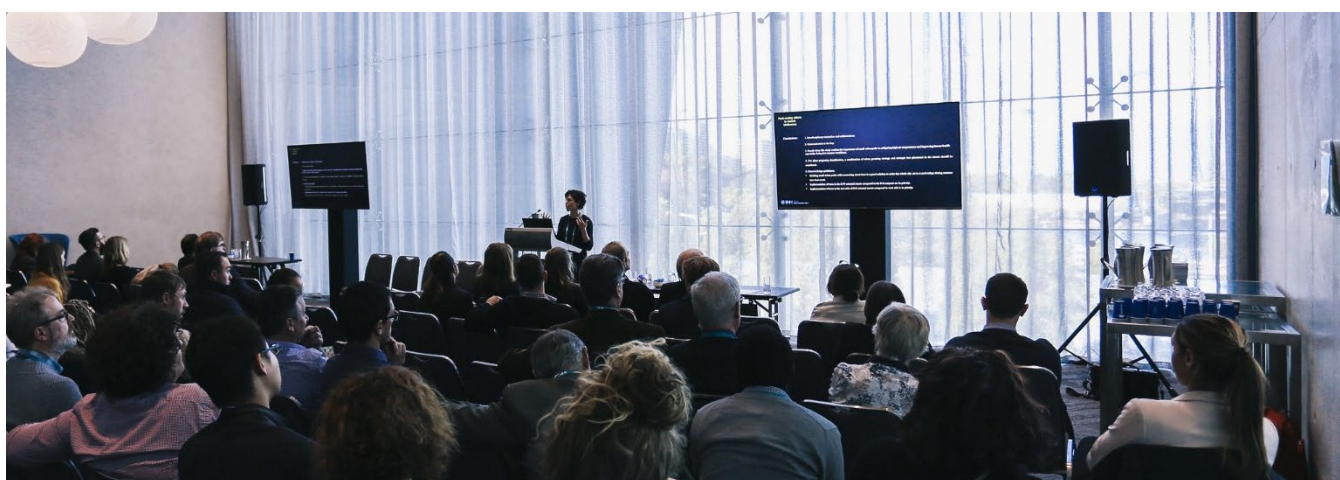
Tool	Use	Pros + Cons	Tips
Zoom	Video meetings with polls and breakout rooms	<p>Pros: consistent user experience</p> <p>Cons: Can be demanding for some computers Some confidentiality issues and risk of the screen crashing unless password used Free version allows only 1 hour meeting with 3 participants</p>	<p>Polling feature allows you to:</p> <ul style="list-style-type: none"> • create polls and save them as meeting templates for future use • view live polling results and share polling results with participants • view percentage of respondents for each answer selection • download poll responses <p>Breakout room feature allows you to split participants into separate meeting rooms Host can assign or pre-assign participants, otherwise Zoom randomly assigns participants</p> <p>Raise hand feature allows participants to push a button to signal to host they have a questions</p> <p>Ability to record sessions and save to cloud or computer</p> <p>Participants can include name and organisation</p> <p>Whiteboard feature makes meetings/workshops more interactive. You can start a whiteboard session, and then invite others to view and annotate. You can save the whiteboard image and annotations at any time by sending the image file to email recipients you specify.</p>
Skype	Video meetings, chat	<p>Pros: Globally adopted high-quality platform</p> <p>Cons: Sound quality is based on bandwidth and is not always reliable</p>	If using Skype with an external client check the audio and video permissions before starting
Mentimeter	Surveys, interviews, focus groups, polling, pop quizzes to reinforce information during adoption presentations.	<p>Pros: Easy to use, quick, engaging, visual results</p> <p>Cons: Restricted voting formats Menti codes are only valid for short time</p>	For participants to be able to see the live Mentimeter results you must be able to share your screen on a video call

Tool	Use	Pros + Cons	Tips
SurveyMonkey	Surveys	<p>Pros: You can include more complex questions and larger surveys than Mentimeter Analysis tools will collate large amounts of data and can send to Excel</p> <p>Cons: Only three people can use the premium version owned by the CRCWSC at any one time Less live than Mentimeter</p>	
MS Teams	Meetings, workshops, document storage	<p>Pros: Integrates all tools and documents in one place, offers good collaboration, can establish more than one regular team and swap between them</p> <p>Cons: Clunky user experience, takes a lot of storage, can be tricky finding the right files depending on which view you are using and how they are sorted into folders The settings you are assigned when the team is created limits actions such as editing information, creating new channels adding apps, organising meetings hence you need to assign an administrator to do this</p>	<p>Form logical naming conventions within teams and channels</p> <p>Pre-determine what issues can be resolved on the chat and what issues require a call</p>
Miro	Brainstorming, co-design, process mapping (visual whiteboards)	<p>Pros: Flexible, reliable, real time\</p> <p>Cons: Unable to work offline, no video</p>	<p>Timebox everything and assign ownership to everyone on the call</p> <p>Practice using the digital tools on the side panels before</p>
Mural	Brainstorming, co-design, process mapping, card sorting, research wall (visual whiteboards and voting options)	<p>Pros: Easy to pick up</p> <p>Cons: Inflexible with complex design challenges</p>	<p>Examples provided to learn how to get the most out of the resources</p> <p>Can use pre-built or design your own templates but remember to lock everything down before the session</p> <p>Try the follow-me, voting and timer options</p>
Webex	Video meetings, chat	<p>Pros: Better security hence used by water utilities such as WA Water Corporation</p> <p>Cons: Harder to use than Zoom</p>	
Google JamBoard	Brainstorming, visual whiteboard	<p>Pros: Easy access via Monash G suite Easy to learn. Basic functionality and coarse tools</p>	Best for simple visual learning activities

References


Rogers, B.C., Gunn, A., Church, E., Lindsay, J., Hammer, K., Dean, A. & Fielding, K. (2020). *Principles for engaging communities in water sensitive city transitions*. Melbourne, Australia: Cooperative Research Centre for Water Sensitive Cities.

Tawfik, S., Shepherd, S., Smith, B. and Chesterfield, C. (2020). *Brabham Action Learning Partnership: Case report*. Melbourne, Australia: Cooperative Research Centre for Water Sensitive Cities.





Cooperative Research Centre for Water Sensitive Cities

 Level 1, 8 Scenic Boulevard
Monash University
Clayton VIC 3800

 info@crwsc.org.au

 www.watersensitivecities.org.au