



National  
Co-ordinating  
Centre for  
Public Engagement

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# Online Engagement:

A guide to creating and running virtual meetings and events

## Introduction

The current health crisis has created a set of unprecedented challenges for those working in Public Engagement (PE). In a sector reliant on establishing connections between people, usually working face-to-face, the pandemic has forced professionals to adapt to solitary ways of working, and to conduct our engagement 'virtually' – whether online, or via the phone.

This guide focuses on designing and delivering online meetings and events. How can professionals transfer their PE skills to the digital medium; how can they hold an engaging, productive or enjoyable session in a virtual space, or maintain their reach and relationship with the audiences they engage?

The NCCPE asked members of its network to share their ideas, techniques and suggestions for creating and participating in online meetings and events. Participants were invited to submit their contributions through Twitter, or via an online document provided by the centre. With the help of our network's experience and innovative thinking, we have compiled the following guide to facilitating meaningful engagement online.

Please do contact us if you have resources or advice you would like us to incorporate into this guide, which we intend to update regularly: [nccpe.enquiries@uwe.ac.uk](mailto:nccpe.enquiries@uwe.ac.uk)

## Top tips for running online meetings

### Important considerations to inform your planning

- Work out what you are trying to achieve with the event and the needs of the participants before you choose the platform to use.
- Get up to speed with the different platforms that are available. We provide a list below with pros and cons. Some are best suited to small meetings, others can cater for larger numbers, with the ability to work in one group, and also divide into smaller groups for discussions.
- Don't just transfer activity to the digital realm, think what the digital can do for you. Be brave and as imaginative online as you would be face-to-face - it is possible with a bit of creative reworking! Often facilitators will steer a session towards PowerPoint presentations rather than activities; there is, however, room for both on a virtual platform.
- Think about accessibility – just as you would for a face-to-face event. We offer some top tips about this later
- Think about ethics and safeguarding – make sure you anticipate these and put in place measures to address these. Again, we offer some suggestions and advice below

### Planning and organisation

- Start by thinking hard about the purpose, and the participants. Work out what you are trying to achieve and with whom, before you decide on the technology.
- Don't assume that online meetings or events are the 'poor relation' of face-to-face meetings. Online platforms allow for lots of different kinds of interaction, including the chance to use

break out rooms, run polls, allow people to share their screens with each other, and to use 'chat' to comment and share responses.

- Use pre-activities, or surveys, to ensure that the event you create is fit for purpose.
- Prepare what you are going to say, so you can be succinct and to the point. Write yourself a script/prompts for things you want to happen in the meeting, and if there's anything you want people to do, give an example (e.g. move to a room, vote, click), and repeat the instructions clearly.
- If the platform allows you to 'share your screen', think about using slides to share simple bullet points or diagrams to reinforce what you are trying to explain
- Have someone to help support the technical aspects. Trying to facilitate, present and manage the technicalities is really hard – so splitting the roles really helps – with a 'presenter / facilitator' and 'technical support / producer' working hand in hand really helps.
- Make time to rehearse the session together in advance. Make sure you test the functionality – potentially using incognito function on your browser to enable you to log in as several people and test how it works.
- Think access: remember that your participants may have specific accessibility requirements. It is always worth asking people when they book, so you can ensure you are catering for all.
- If an online event starts at 10:00, encourage people to join from 09:30 onwards - the virtual equivalent of registration with tea/coffee. It means people can introduce themselves, chat, identify common issues (if that's of relevance) and sort out any AV-issues before the event itself starts.
- Working for extended periods of time online requires a lot of concentration. It is important to provide breaks from the screen for participants, which can be planned in advance. For instance, it can help to offer people the opportunity to go and think about a question, or to work through an activity relevant to what you are doing, before coming back together to share.
- Decide if and how participants are going to participate, bearing in mind the bandwidth needed for all delegates to stream video. For some sessions, it may help to move discussion into the online chat channel with only the presenter / facilitator using video; for others, verbal communication may be more effective. Encourage everyone to turn off their mics when they are not speaking, to avoid background noise.
- Presenting online is a different skill to presenting face to face, so don't be surprised if your contributors would like some support, and offer to practice the session before your participants get involved. Some platforms allow you to create breakout groups; these can be useful for presenters to spend time together advance of the event and share any last minute tips (or soothe any nerves).
- If the software you are using does not facilitate break-out groups, there are other methods you can use. Inform delegates of their groups in advance, and ask them to find their own way of communicating outside of the conference app. In previous examples, delegates have used WhatsApp, Skype, Slack and other platforms as alternative ways of communicating. You will need to be clear about when people need to return online though, especially if working across

different time zones

### **Facilitating the meeting**

- Keep it short and to the point.
- Be clear in your instructions, and repeat them. Where possible have a slide up – especially when people are in separate groups and new people are signing in.
- Remember to consider the range of technology / devices delegates may be using, and that they may have slower internet connections.
- Agree etiquette at start, ensuring that people know to mute microphones at appropriate times, etc.
- Use the platform's functionality to help support everyone to participate, including those who don't want to speak on camera.
- You can set up chat functions to be anonymous, which may give opportunities for people to be more honest.
- Have fun! You can make the experience lovely for people; even playing music or a PowerPoint on loop to welcome people to the virtual meeting.

### **If things go wrong**

- Have a clear back up plan. It is possible that your technology will fail, or a presenter gets cut-off mid flow. Make sure delegates know what to do if they can't access the online space, and have someone whose core role is to liaise with them to help them deal with any technical problems. Most of these can be anticipated, so have a handy help guide ready!
- Collect PowerPoint presentations from presenters in advance and circulate around delegates; if the technology fails, delegates will still have access to the slides.

### **Attending a meeting**

- Come to the session slightly early and use the tools to test your audio and video.
- Tune into the meeting etiquette, ensuring your mic is switched off if you are not speaking. It is easy to forget to switch it on again when you need to share your thoughts; try to get into the habit of doing this.
- Actively participate – whilst it can be tempting to lurk in the background, don't be afraid to share questions, thoughts or ideas in ways supported by the event.
- Forget about bad hair days, messy video backdrops, and odd camera angles and embrace seeing people face to face if possible. If you look directly at the camera, you will make a better connection with people when you speak – the temptation is to look down at the screen rather than up at the camera. You can test out what the video looks like before you start, to see how things look. And during the meeting – don't forget that your camera is on (and that you can turn it off and on if you need to)!

## Ethics, privacy and safeguarding

- Be careful to consider the ethics and privacy issues in relation to the platform you are using. Some platforms retain data and use it for their own purposes later, i.e. profiling and advertising. It's important to be mindful of these issues, and be wary of signing community partners and students up to platforms that might use their data in unethical ways.
- Remember to set a password for platforms such as Zoom and Google Meet. Without one, it is possible for strangers to enter open lobbies and disrupt the conference (also known as 'zoom-bombing')
- For information on debates surrounding privacy and information retention by social media companies, please see the twitter account 'Privacy Matters':  
<https://twitter.com/PrivacyMatters/status/1238394217602469888?s=20>
- NSPCC provide useful resources on online / social media safeguarding for children:  
<https://learning.nspcc.org.uk/safeguarding-child-protection/online-safety-for-organisations-and-groups/>
- Carnegie UK Trust have published a useful blog: 'Digital safeguarding is just safeguarding':  
<https://www.carnegieuktrust.org.uk/blog/notwithoutme-lab1/>

## Accessibility

- Make sure you know what the needs of your participants are, and put in place appropriate ways to engage them. For example, some platforms offer the option for live transcripts for presenters.
- For guidance on writing and formatting accessible content for the web, there is information from Content Design London concerning readability guidelines:  
<https://readabilityguidelines.co.uk/clear-language/plain-english/>  
<https://readabilityguidelines.co.uk/content-design/>
- 'Cue cards' for video meetings can help less confident participants get involved:  
[https://www.keepsafe.org.uk/to-do/cue-cards-for-video-meetings?fbclid=IwAR322F8B\\_77Z\\_PBXpaw-BZXAO3MFvffhJlrrPCtnuFtcarDpDqq3NByjml](https://www.keepsafe.org.uk/to-do/cue-cards-for-video-meetings?fbclid=IwAR322F8B_77Z_PBXpaw-BZXAO3MFvffhJlrrPCtnuFtcarDpDqq3NByjml)

## Online Platforms

In a continually evolving online landscape, the choice of platform isn't always a simple one. Whether it be communicating with colleagues, disseminating written information, or streaming content to a sizeable audience, online engagement requires the right tool for the right job. With so many options available, finding the perfect platform for one's engagement isn't always easy.

We asked members of our network to tell us which platforms they use, and to illustrate the positives and negatives relating to each one.

<b>Microsoft Teams</b>	
<p>Best used for:</p> <ul style="list-style-type: none"><li>• Working with colleagues through chat functions and video conferencing</li><li>• Keeping team documents, files, and conversations in one place.</li><li>• Sharing ideas in a team.</li></ul>	<p><b>Pros:</b></p> <ul style="list-style-type: none"><li>• Easy and intuitive to use.</li><li>• Already used by many universities.</li><li>• Inexpensive for community partners to use, if they require their own accounts beyond a 'guest' one.</li></ul> <p><b>Cons:</b></p> <ul style="list-style-type: none"><li>• May need some practice to take advantage of its full functionality.</li></ul>
<b>Blackboard Collaborate</b>	
<p>Best used for:</p> <ul style="list-style-type: none"><li>• Video conferencing</li><li>• Webinars</li><li>• Larger online events</li><li>• Teaching and learning</li></ul>	<p><b>Pros:</b></p> <ul style="list-style-type: none"><li>• Great for developing learning amongst participants – it is widely used in universities to deliver online teaching.</li><li>• Wide range of functionality; facilitators can share screens, create polls, or split the conference into smaller groups.</li><li>• If the owner / facilitator has access, it is free for any participant.</li><li>• Does not require special software for participants; can be accessed via web browser.</li><li>• Is already used by many universities.</li></ul> <p><b>Cons:</b></p> <ul style="list-style-type: none"><li>• As many institutions will be using Blackboard Collaborate during the pandemic for events, lectures and seminars, the app itself may have reduced capacity.</li></ul>

## Zoom

### Best used for:

Audio/ video conferencing, both small and large scale.

**Notes:** Wildlabs has created a guide to running events from Zoom:

<https://www.wildlabs.net/resources/comm-unity-announcements/wildlabs-virtual-workshop-recording-running-engaging-events-zoom>

### Pros:

- Easy to use.
- Can be accessed via computer, phone or tablet devices.
- Attendees do not require an account to join a Zoom meeting.
- Ability to share and annotate screens/ documents, create virtual breakout rooms, record meeting (AV/ audio-only), and communicate using the chat box (with ability to group or privately message others)
- Can assess whether a delegate's internet is unstable, or suffering from low bandwidth.
- The meeting host has range of abilities (e.g. muting microphones, assigning co-hosts) which helps maintain order or manage a large numbers of participants.

### Cons:

- Free group calls are restricted to forty minutes (although 1-to-1 call length is unlimited).
- Zoom is currently under scrutiny regarding data practices.
- Requires a good password/ encryption to avoid 'videobombing' by strangers

## Google Hangouts

**Best used for:** Small group meetings with video/ audio.

### Pros:

- Ability to share documents, screen share, create polls and surveys.
- Mobile and desktop use.
- Can be used with notifications

### Cons:

- Free, but can only accommodate ten people; a purchase is required to access the option for larger meetings.
- A Google account (or Gmail address) is required by participants requiring more functionality (such as the chat option).

<b>Slido</b>	
<p>Best used for:</p> <ul style="list-style-type: none"> <li>• Interactive tool for online engagement.</li> <li>• Online meetings.</li> <li>• Real time polls, surveys and questions.</li> </ul>	<p><b>Pros:</b></p> <ul style="list-style-type: none"> <li>• Good visuals.</li> <li>• Answers can be anonymised.</li> <li>• Can collate questions and results.</li> </ul> <p><b>Cons:</b></p> <ul style="list-style-type: none"> <li>• Can be slow sometimes if responses are time sensitive.</li> </ul>
<b>Facebook</b>	
<p>Best used for:</p> <ul style="list-style-type: none"> <li>• Social media</li> <li>• Creating pages, adding content, communicating with audiences</li> <li>• Streaming or uploading video</li> </ul>	<p><b>Pros:</b></p> <ul style="list-style-type: none"> <li>• A vast portion of existing or would-be-audiences already have access to an account.</li> </ul> <p><b>Cons:</b></p> <ul style="list-style-type: none"> <li>• Possible ethical concerns regarding the platform, particularly in the way it processes personal data.</li> </ul>
<b>Twitter</b>	
<p>Best used for:</p> <ul style="list-style-type: none"> <li>• Sharing images, videos and short text content.</li> <li>• Building networks.</li> <li>• Twitter threads allow for longer discussions.</li> </ul>	<p><b>Pros:</b></p> <ul style="list-style-type: none"> <li>• Widely used by existing and potential audiences.</li> <li>• Format allows for brevity.</li> <li>• Possible to have more public discussions</li> <li>• Useful for reaching schools.</li> </ul> <p><b>Cons:</b></p> <ul style="list-style-type: none"> <li>• Discussion can often be quite one-way and unbalanced, rather than an actual dialogue</li> <li>• Due to the scale of the site, users may feel that they are only reaching their own existing networks rather than engaging new ones.</li> </ul>



<b>Instagram</b>	
<p>Best used for:</p> <ul style="list-style-type: none"> <li>• Social media</li> <li>• Sharing short videos or photos</li> <li>• Livestreaming</li> </ul>	<p><b>Pros:</b></p> <ul style="list-style-type: none"> <li>• Greater livestream stability than Facebook</li> <li>• Customisation of content (lighting, layout etc)</li> <li>• Widely used by existing and potential audiences</li> </ul> <p><b>Cons:</b></p> <ul style="list-style-type: none"> <li>• Some functionality restricted to phone use</li> <li>• Often streaming is relegated to portrait mode</li> </ul>
<b>YouTube</b>	
<p>Best used for:</p> <ul style="list-style-type: none"> <li>• Video content</li> <li>• Livestreaming</li> </ul>	<p><b>Pros:</b></p> <ul style="list-style-type: none"> <li>• Widely used by existing and potential audiences</li> <li>• Does not require an account to view content</li> <li>• Adjustable privacy settings; does not require a 'limit' on audience numbers.</li> </ul> <p><b>Cons:</b></p> <ul style="list-style-type: none"> <li>• Ability to upload videos with high quality resolution</li> <li>• Fewer options for audience/ delegate participation</li> </ul>
<p><b>Notes:</b> Open Broadcaster Software can be integrated with livestreams using YouTube and Twitch. OBS gives user greater functionality over their streams, enabling them to share their screens, or to interact with an audience to a greater extent)</p>	
<b>Twitch</b>	
<p>Best used for:</p> <ul style="list-style-type: none"> <li>• Livestreaming</li> </ul>	<p><b>Pros:</b></p> <ul style="list-style-type: none"> <li>• Programme is purpose built for livestreaming, and is therefore very stable</li> <li>• Does not require a 'limit' on audience numbers.</li> </ul> <p><b>Cons:</b></p> <ul style="list-style-type: none"> <li>• Fewer options for audience/ delegate participation</li> </ul>

**Notes:** Open Broadcaster Software can be integrated with livestreams using YouTube and Twitch. OBS gives user greater functionality over their streams, enabling them to share their screens, or to interact with an audience to a greater extent)

### **'I'm a Scientist' platform**

Best used for:

- Researcher Engagement with schools

**Pros:**

- Genuine two-way engagement with groups of more than sixty people.
- Could cope with far higher numbers theoretically.

**Notes:**

- I'm a Scientist has launched <https://green.imascientist.org.uk/> for IAS schools to trail the programme before its launch after 12/03/2020.
- Could be used by other organisations looking to maintain schools engagement during closures e.g. Museums, Research Institutes, universities etc. Please contact [shane@mangorol.la](mailto:shane@mangorol.la) for more info.

### **Additional Platforms**

During an email discussion between members of our network, some additional platforms were recommended for online meetings and conferencing:

- **Jitsi**
- **Google Meet**
- **Webex**

## Resources

- For further guidance on using social media as a tool of engagement, please see the NCCPE's document 'What Works: Engaging the Public Through Social Media':  
[https://www.publicengagement.ac.uk/sites/default/files/publication/what\\_works\\_engaging\\_the\\_public\\_through\\_social\\_media\\_november\\_2018.pdf](https://www.publicengagement.ac.uk/sites/default/files/publication/what_works_engaging_the_public_through_social_media_november_2018.pdf)
- For advice on streaming using OBS, please see Digital Trends' guide:  
<https://www.digitaltrends.com/computing/how-to-live-stream-on-youtube-with-obs/>
- For information pertaining to the use of Facebook as a tool of engagement, please see the links shared by Sophia Collins of Parenting Science Gang:  
<http://parentingsciencegang.org.uk/evaluation/top-tips-on-using-facebook/>
  - <https://sophiacollins.wordpress.com/2020/03/20/using-facebook-as-a-venue-for-public-engagement-things-we-learned-from-nappy-science-gang/>
  - Sophia Collins (@sophiacol on twitter) has offered to answer questions concerning Facebook as an engagement tool.
- For guidance on using Zoom as a tool for events, please see Wildlabs' guide:  
<https://www.wildlabs.net/resources/community-announcements/wildlabs-virtual-workshop-recording-running-engaging-events-zoom>
- A transcription of the ScotPEN meeting discussing Online Engagement can be found here:  
<https://www.publicengagement.ac.uk/sites/default/files/publication/onlineengagementtranscript.pdf>
- Bang The Table's guide to making deliberative dialogue work online:  
<https://www.bangthetable.com/blog/making-deliberative-dialogue-work-online/>

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