

Lessons in Virtual Engagement: The Hard-Won Lessons and Advice from Peers

The following bits of advice were gleaned from 20 interviews with project and engagement leads of projects funded by the NERRS Science Collaborative during the COVID-19 pandemic. Compiled by Susanne Moser, Ph.D. (March 2022).

- **Take a training in virtual engagement – it’s time well spent!**
- **Plan really well for virtual meetings => it takes more time – just plan for it to avoid stress**
 - Set clear goals (get buy-in)
 - Develop a detailed facilitator/process agenda
 - Share a shorter public agenda in Google doc so people can follow
 - Orient participants upfront and regularly over the course of the meeting
 - Include multiple stretch & bio breaks
 - Have note-takers in break-out groups (BOGs)
 - Overschedule, then let people go “early” (people feel grateful as they leave)
 - Really know who is coming; keep notes on their goals, interests, concerns
 - Prior to meeting train people on how to give ppts online
- **Have handler of technical issues (separate from facilitator)**
 - To help move in/out of BOGs; to deal with tech. challenges; to mind and monitor chat
 - Always put prompts, questions in chat
 - Don’t name the problem/mistakes; just act cool and collected; no one knows
- **Have good ice-breakers or check-in prompts**
 - Examples: Guessing game to recognize locations, wildlife; favorite foods in childhood and now > change
 - Relate check-in prompt to the theme of the day somehow
 - Doodling (pencil and paper)
 - Manage people introducing themselves
- **Keep it interesting and doable for all**
 - Vary presentation, discussion, interactive activities/exercises, leads on different parts
 - Value discussion over information delivery (can be sent upfront)
 - Always give more than one option to provide input (in and after meeting)
 - Move it!; keep it fast-paced – people need surprises (e.g., virtual beer, gift boxes)
 - Be patient; grow comfortable with silence; give people time to respond
- **Beware of and respect everyone is on overload**
 - Due to email overload, try several times and in different ways to reach people (e.g., with survey requests, email and call people)
 - Recognize that different stakeholders/team members have different needs (e.g., meeting frequency)
 - Be cognizant and respectful of everyone’s stresses
 - Beware of vulnerability of points of contact – loss of connection to key communities
 - Be patient! Give yourself/others grace!
- **Be conscientious and purposeful in follow-up**
 - Record sessions, then share post-meeting with notes; but recognize most don’t watch
 - Share agenda with links to presentation (time-stamped)

Additional Tips for Hybrid Meetings

- Beware that hybrid field trips and or classroom activities are hard to pull off well (often it doesn't work)
- Work with one facilitator for people in the meeting room; another for people online;
- Must have good rapport between the two facilitators
- Practice hand-off/integration beforehand
- Ensure people online can hear well, have opportunity to participate equally (e.g., repeating questions, sending visuals, specific times for their questions, input)
- It's worth investing in good video conferencing system

Additional Tips for Asynchronous Engagement Between Virtual Meetings

- Send materials to participants
 - Ahead of meeting with clear instructions to prepare
 - After meeting (e.g., notes, prompt follow-ups, presentation links)
- Give people opportunities to co-design shared protocols/approaches
- Set expectation of "homework" but be respectful of people's added demands at home
- Follow-up or have advance one-on-one conversations – may get more useful input
- A deeply-embedded person on the ground who can serve as connector, legitimizer, mobilizer helps to maintain contact and engagement

Other Good Advice

- Keep your various physical and digital calendars up-to-date and synched; otherwise, you create yourself extra work having to work out the schedule conflicts
- Experience shows that both sequences of engagement work and there is no simple rule for when to use which:
 - In-person > virtual meetings
 - Virtual > in-person meetings
- Beware of the technical limits for small organizations and rural/remote locations (band-width)
- Don't worry too much about problems until you face them
- Offer people to "choose their own adventure" (multiple ways to engage with you)
- Engage different learning styles (visual, audio, hands-on)

