

Virtual Engagement Toolkit

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Hamilton



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Background and Acknowledgements

Reflecting on lessons learned during the [2020 CityLAB Hamilton Semester in Residence program](#), the following document is intended to support community engagement practitioners conducting virtual engagement programming online. Topics covered include virtual facilitation skills, platform recommendations, and accessibility considerations. An interactive version of this document can be accessed [here](#).

The document was prepared by 2021 CityLAB Ambassadors Ananya Yadav and Julia Menezes at McMaster University. Special thanks to Dave Heidebrecht and Randy Kay (McMaster University Office of Community Engagement) for their continued guidance throughout this project.

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PART I

INTRODUCTION

CHAPTER 1

Background

“This week I was in a virtual meeting with 30 people and introductions took 45 minutes of the hour we had. I don’t think people have tools/skills yet to creatively meet online.” – Anonymous Survey Participant

In 2020, the COVID-19 pandemic placed limitations on in-person community engagement work, and the need for new, inclusive methods of connecting with stakeholders virtually emerged.

This resource is designed to support community engagement practitioners to develop engaging and inclusive events in a virtual format.

The recommendations have been compiled based on best-practices from the virtual engagement work conducted during the [2020 CityLAB Semester in Residence \(SIR\)](#) – a four-month, community-engaged experiential learning program that connects students with community leaders. In the fall of 2020, students in the CityLAB SIR program worked with staff at the City of Hamilton

to design and conduct inclusive and accessible virtual community engagement events.

Building on the success of community engagement work developed during the SIR program, this Toolkit provides recommendations for hosting synchronous engagement events in a virtual setting. Recommendations are drawn from qualitative lessons learned during the 2020 SIR, including feedback from a virtual engagement survey of 14 SIR students, teaching staff, and community partners. Additional recommendations are drawn from a literature review of current best practices.

CHAPTER 2

Scope

This Toolkit IS:

- A resource for community engagement practitioners seeking to develop engaging and inclusive events for 10-25+ participants in a virtual or hybrid format.
- A resource for students and staff conducting online events at McMaster University, including students enrolled in Community Engagement courses.
- An evolving document that broadly reflects best practices as of April 2021. As online engagement continues to evolve, our goal is to update this resource.

This Toolkit is NOT:

- A guide for teaching and learning online.
- An overview of all online community engagement formats (i.e. surveys, polls, interactive maps).
- The [Tamarack Institute's Index of Community Engagement Techniques](#) provides detailed information for practitioners seeking to learn more about types of in-

person and virtual community engagement.

PART II

PLANNING VIRTUAL ENGAGEMENT EVENTS

Determining Events Goals

Before planning a virtual engagement event, it is essential that you clearly outline your project goals, the scope of your work, and the stakeholders involved. The Principles of Community Engagement are a great resource to help you reflect on your event goals.

Consider:

- Why have you chosen to host a virtual engagement event specifically?
- What do you hope to accomplish by hosting your event?
- What is within scope for your project?
- What is out of scope for your project?
 - Are there time, budget, or other constraints?
- Who are the stakeholders?
- Why is a virtual engagement event a good fit for your identified stakeholders?

CHAPTER 4

Principles of Community Engagement

These principles of community engagement were co-developed with community and campus partners at McMaster University. The broad and action-oriented nature of these principles allows them to be applied across a variety of partnerships, local or global, and across different Faculties, disciplines, and sectors. The principles stress the importance of respectful relationships as the foundation of all engagement initiatives. More information regarding the community engagement principles can be found on [McMaster's Community Engagement website](#).

Below you will find the five principles of community engagement and some key questions to consider when planning virtual events that align with the principles.

Reciprocity

"From design, to participation, to the outcomes of a project, we strive to work together for mutual benefit."

Questions to consider:

- Who are the stakeholders?
- How does your engagement method support these stakeholders?
- What steps are you taking to ensure that stakeholders' time and participation are being valued and respected?
- Have you identified future opportunities to connect with and support stakeholders?
- What unique opportunities might arise as you work with the identified stakeholders in an online environment?

Equity

"We are conscious of the historical and structural inequities that exist in society and strive to provide access and opportunities to all residents and members of our communities."

Questions to consider:

- Whose voices and what perspectives are you prioritizing? Why?
- Who is not being heard?
- Are there structural barriers that prevent certain individuals from participating in your virtual engagement event?
- What challenges or barriers might arise as you work with stakeholders in an online environment?
- How can you mitigate these barriers?

Continuity

"Acknowledging that different communities work on different timelines and schedules, we strive to consider both the short and long-term implications of our work together."

Questions to consider:

- Does your event respect the time and priorities of stakeholders?
- Have you considered how your event will impact stakeholders in the short and long terms?
- Have you clarified what is within and out of scope for your event?
- Have you discussed your priorities and timelines with stakeholders?
- Have you clarified and respected stakeholders' goals and timelines?

Openness to Learning

"Change takes time. We are committed to continually learn from and evaluate our work together, reflecting on and sharing both our successes and failures to grow as individuals, partnerships, and communities."

Questions to consider:

- Have you built flexibility into your event structure?
- Are you willing to adapt to unexpected lessons or changes that arise in the planning or facilitation stages?
- Will you keep an open mind when faced technical challenges?
- Have you set aside time to reflect on the opportunities and challenges of your virtual engagement event?
 - How will the lessons you have learned contribute to the goals of your engagement work?
 - How will the lessons you have learned contribute to your personal (or team) goals?

Commitment to Act

"We aspire to make a positive difference in our community by sharing and acting on our knowledge to contribute to the greater social good."

Questions to consider:

- How will the lessons learned from your engagement work be used?
- Will you provide stakeholders with a feedback form or other method of providing comments? How will this feedback be used?
- After your event, will you update stakeholders on the progress of your project.

For a greater understanding of how McMaster students have integrated the principles of community engagement into in-person community-engaged work, you can view [The Principles of Community Engagement Module](#).

CHAPTER 5

Small to Mid-Sized Events (up to 25 people)

Events with 10-25 people allow various groups within a community to come together to share ideas in an intimate setting. They allow organizers to build trust and close relationships with stakeholders. Events of this size can accommodate both presentation-style events and also more interactive engagement components that involve stakeholders.

Key Takeaways: small to mid-sized events build trust and community connections, and are beneficial for hosting in-depth discussions or workshops.

CHAPTER 6

Larger Events (25+ people)

Larger events are useful for presentation-based events that aim to disseminate information to a large group of people. They provide different individuals and groups with an opportunity to hear differing perspectives from a wide range of people. Depending on the virtual platform that is used, larger events can also facilitate networking opportunities, host panel discussions, and emulate a conference setting for a large group of people. Within larger events, breakout sessions can be used to simulate the community-building aspect of small or mid-sized events.

Key Takeaways: larger events are beneficial for disseminating information, for example by sharing different perspectives, networking, or hosting a conference.

CITYLAB SIR CASE STUDY: BREAKOUT ROOMS



Image: Students in the Complete Streets group smile after hosting a virtual engagement event.

As part of the Complete Streets project, four SIR students hosted a community engagement event in Hamilton's Ward 1 community. The team decided that a large event with breakout rooms would be an ideal way to provide information to all Ward 1 stakeholders, but still wanted a smaller community feel. They decided to host a large event for 30+ stakeholders while also building closer community connections in breakout room groups.

"The breakout rooms worked really well," reflected one student, "participants were more willing to share their ideas about street safety because they were in a smaller group where everyone knew each other's names." At the end of the breakout sessions, participants returned to the larger group to summarize the findings of the smaller discussions. For more information about the success of their event, see Appendix C.

CHAPTER 7

Best Practices for Structuring Events

You've decided to host a virtual engagement event. What comes next?

Event length

Determining an appropriate event length is essential for hosting a successful virtual event. Just like during in-person events, virtual events should always end on-time out of respect for all participants.

- To ensure that the event doesn't run over time, allot an extra 5-10 minutes when scheduling.
 - If you anticipate that the content of an event will

take 50 minutes, schedule the event for 1 hour. This allows extra time to account for last-minute logistical difficulties.

- Wherever possible, try to minimize the length of your event.
 - If there is background information that you can provide participants with asynchronously before the event, do so! This can help to minimize screen fatigue and prioritize group discussion when you are in the synchronous space.

Breaks

Screen-breaks or bio-breaks are critical components of online events.

Breaks allow your audience to turn off their cameras, step away from the screen, and re-charge before the remainder of your event.

When planning breaks, consider:

- Who is your audience?
 - Can you expect your audience to sit in front of a screen for 1 hour or more? Or are more frequent breaks necessary?
- What is your event length?
 - For events under 1 hour: a break is typically not required.
 - For events over 1 hour: breaks should be integrated at each 45 minute to 1 hour interval.
- What type of break will you integrate?
 - Short breaks: If you are facilitating a shorter,

smaller event, you may choose to do a short synchronous break where participants are asked to stand-up and stretch or divert their attention from the screen for a few minutes.

- Programs like [Insight Timer](#) provide guided mindfulness exercises that can be used to facilitate short, synchronous breaks.
- Longer breaks: If you are facilitating a longer event, you will need to integrate asynchronous breaks where participants are invited to turn off their cameras and step away from the screen.

CITYLAB SIR CASE STUDY: SCREEN BREAKS

□ Meditation



Image: The following slide was taken from a mindfulness activity done during the 2020 SIR.

During the CityLAB SIR, synchronous screen breaks were used to maintain focus during longer classes and events. In one example, students participated in a 5-minute mindfulness exercise that was presented using Insight Timer. At other times, students were asked to stand up and stretch as the instructor facilitated a series of simple yoga exercises, or unmute their microphones and participate in a “scream” break.

- How long will an asynchronous break last?
 - Ideally, asynchronous screen breaks should last between 10-15 minutes.
 - You may choose to project the event return time on the screen during the break, or alternatively, a countdown timer. In a platform such as Zoom, this can be achieved by using the “Screen Share” feature and an online countdown timer.
 - You may choose to play music during the break, as a creative way to invite participants to return to the event. For example, you might begin the break by stating “we will reconvene in 10 minutes, when the playlist changes to [insert name of song]” or “the song that I’m about to share is 12 minutes long, so take a break and we’ll reconvene when the song is finished playing”.

Question and Answer Period

Depending on the scale, scope, and goals of your event, you may decide to set aside time for participants to ask questions. During webinar or presentation-based events, a dedicated Q&A time can help minimize disruptions and maintain a strong event flow.

- Integrating questions throughout an event:
 - Allot specific times for participants to use the raise-hand function and ask questions in between event segments. For example, you may choose to dedicate every fifth slide in your presentation to answering audience questions.
 - If you have planning staff to dedicate to a Q&A

role, you may ask audience members to submit questions throughout the presentation to be answered immediately via responses in the chat.

- **How does this work?** In a Zoom webinar, enable the “Q&A” function, and ask participants to submit questions through the Q&A button at the bottom of their screen. The Q&A staff member will be able to reply directly to any questions by chat as they are submitted without disrupting the flow of the event.
- Integrating questions into the middle or end of an event:
 - Ask participants to save any questions until the specified Q&A time.
 - If you have planning staff to dedicate to a Q&A role, you may ask audience members to submit questions throughout the presentation to be answered live during the Q&A period.
 - **How does this work?** In a regular Zoom meeting, ask participants to private message any questions to the designated Q&A staff member using the Zoom chat function. For example, you may ask participants to “message [insert name] using the chat feature at the bottom right corner of your screen”. The Q&A staff member will compile the questions in the chat and read them to the presenters during the designated Q&A time. This method is particularly

helpful when you have restricted time to answer questions.

PART III

FACILITATING VIRTUAL EVENTS

CHAPTER 8

Pre-Event Etiquette

78% of survey respondents cited “not engaging enough” as a weakness of virtual events they attend.

Promoting your Event

- Create a ticket for your virtual event to allow guests to register beforehand. [Eventbrite](#) is a popular event management and ticketing tool that can be used without cost for free events.
- Go where your audience is!
 - Promote your event in spaces that are relevant to your target audience. Here are some ideas:
 - Neighbourhood groups on Facebook
 - Neighbourhood newsletters

- Social media
 - Word of mouth
- When promoting your event, make sure to highlight how the attendees will benefit from attending the event.

Communicating with Stakeholders

- Send out event invitations (email, telephone, text message, etc.)
- Once stakeholders have registered, send out an event reminder approximately 2 days in advance and at least one hour before the event starts.
- Send out a “how-to” guide for the platform you are using (digital literacy) along with the event agenda, and any event slides.
- Ask about stakeholder’s familiarity with various technologies to gauge how much of a learning curve stakeholders will face.

Pre-Event Document Examples from the CityLAB SIR

The following documents were created by students in the 2020 CityLAB SIR to inform stakeholders about their virtual engagement events. The documents were shared via social media and by email. A high-resolution version of the documents can be accessed in [Appendix C](#).

GOALS

On Thursday, Nov. 26th from 12:00 AM – 12:30 PM, CityLAB Hamilton and the City of Hamilton Neighbourhood Development Section will be hosting an online community engagement roundtable.

The Goals for the roundtable include:

- Providing residents with a space to connect with other neighbourhood and community organizations
- Helping connect residents with City of Hamilton Neighbourhood Development staff
- Gathering feedback from residents on challenges and needs surrounding community engagement in a pandemic setting

The feedback gathered from the community engagement roundtable will inform priorities and actions for the City of Hamilton staff as they return to their Neighbourhood Development roles.

AGENDA

11:00 – 11:15 INTRODUCTION

11:15 – 11:45 SMALL GROUP SESSION 1

- Participants will have discussions in small groups to share CHALLENGES AND PRIORITIES regarding community engagement during the pandemic

11:45 – 11:55 BREAK

11:55 – 12:25 SMALL GROUP SESSION 2

- Participants will have discussions in small groups to share ways that the City of Hamilton staff can support residents through different STRATEGIES AND SOLUTIONS

12:25 – 12:30 WRAP UP

12:30 – 1:00 OPTIONAL: LARGE GROUP SESSION

- An opportunity for residents to discuss insights, ask questions, and highlight concerns



CITY OF HAMILTON: NEIGHBOURHOOD DEVELOPMENT

The City of Hamilton's Neighbourhood Development Section is responsible for supporting resident-led initiatives that contribute to safe and healthy communities. This support assists residents in making positive change and engaging in leadership in their communities.

The pandemic has presented many challenges for the Neighbourhood Development section, including the redeployment of their staff and the discontinuation of the city's support with neighbourhood associations. Rebuilding these relationships and connecting with the residents is crucial to the section's work as the city recovers from the COVID-19 pandemic.



CITYLAB HAMILTON

CityLAB Hamilton is an innovation hub that brings together students, academic, and civic leaders to co-create a healthy, sustainable, and vibrant Hamilton for all. Each year, the hub hosts a **Semester in Residence program**, where students from McMaster University work with City of Hamilton staff partners on various city challenges.

This fall, a group of CityLAB Semester in Residence students have partnered with **Al Fletcher**, Manager of Neighbourhood Development for the City of Hamilton. Together, the group seeks to identify needs and develop strategies to keep neighbourhood and community organizations reconnected with residents in the pandemic setting.

NEIGHBOURHOOD RE-ENGAGEMENT PROJECT

The primary goals guiding this project include:

1. Engaging community partners (community organizations & residents) and city staff to identify needs and priorities that can guide Hamilton's community engagement efforts in the current pandemic setting.
2. Studying successful practices, positions, and engagement, and learn to identify best practices for community engagement within a pandemic.
3. Acting both as a consequence of all recommendations, as an action plan to guide the City of Hamilton's community engagement efforts in the near future.

GET INVOLVED

Ways that you can get involved in this project include:

- **Survey:** Click [here](#) to provide feedback through a neighbourhood engagement survey.
- **Virtual Community Roundtable:** Click [here](#) to RSVP to our online community roundtable taking place on Thursday, Nov. 26th & Thursday, Nov. 27th.
- **Reaching Out With Feedback:** Email us at neighbourhooddevelopment@cityofhamilton.ca with any questions or inquiries or [Visit Our Website!](https://www.cityofhamilton.ca)



Ward 1 Complete Street Intersection Makeover Virtual Charette

TUESDAY NOVEMBER 24, 2020 | 7:00-8:30 PM (EST) | ONLINE VIA ZOOM

Virtual Charette Goals:

- Identify key community priorities with respect to a Complete Streets design at an intersection in Ward 1.
- Complete quantitative and qualitative feedback using a virtual whiteboard activity to identify what stakeholders would like to see implemented at the intersection.

Agenda:

7:00 - 7:05	Welcome and Introductions
7:05 - 7:10	Words from Councillor Wilson
7:10 - 7:20	Project Context
7:20 - 8:00	Virtual Charette in Breakout Rooms
8:00 - 8:20	Large Group Discussion
8:20 - 8:30	Wrap-up & Final Words

Accessibility Statement: We seek to make our virtual charette event as accessible as possible in an online environment. Should you require specific accommodations, please reach out to us at @cmcmaster.ca.

Preparing for the Event

- Familiarize yourself with the technology!
- Conduct a practice run of the event to ensure that all technology is working and that all organizers understand their roles and responsibilities.
- When practicing the event, brainstorm possible technical difficulties that could arise. Consider:
 - What happens if the presenter's audio is not working?
 - How will I respond if there is audio feedback? Do I know how to mute other participants?
 - Do I know how to admit participants from the waiting room?
 - Am I comfortable creating breakout rooms,

sending messages to breakout room groups, and closing breakout rooms?

CITYLAB SIR CASE STUDY: PRE-EVENT SURVEY



Image: Students in the Engage Hamilton group wave goodbye on the final day of the SIR.

As part of the Engage Hamilton project, four SIR students hosted a mid-sized virtual engagement event to learn more about how the City of Hamilton could increase participation on the online Engage Hamilton platform. Being mindful of stakeholders' priorities, the group provided a survey in the event registration form so that stakeholders could indicate their interest regarding different project themes. The goal was to assign stakeholders to discussion groups that best reflected their personal interests during the event. The group's attention to pre-event etiquette was reflected in the engagement of stakeholders during their event. More

information about their work and the success of their event can be found in Appendix C.

CHAPTER 9

Post-Event Etiquette

Communicating with Stakeholders

- Remind attendees at the start and end of the event that you will be sharing all relevant event materials (slide decks, resources, feedback survey etc.) with them.
- If there is a designated person for post-event follow up ensure that they send out any relevant materials within an hour after the event has concluded.
 - Also keep an eye out for questions or comments that may be sent by attendees. Make certain that questions and comments are acknowledged in a timely manner.

The following survey tools can be used to gauge post-event feedback:

Survey Tools	Key Features
Google Forms	<ul style="list-style-type: none">• This is a free tool that allows you to create unlimited surveys• Offers 6 question types• Strong integration with other Google apps
Typeform	<ul style="list-style-type: none">• The free version offers unlimited surveys with up to 10 questions• Ability to create engaging and interactive surveys
Survey Monkey	<ul style="list-style-type: none">• The free versions offers surveys with up to 10 questions

CHAPTER 10

Organizer Roles

Having a team of organizers assigned to specific roles will help to mitigate technical difficulties and ensure that the event is a success. Depending on the goals and scope of your event, you may choose to assign organizers to some (or all) of the following roles.

Main Facilitator(s)

Responsible for greeting participants, facilitating discussion, and maintaining an overall flow to the event. The main facilitator ensures that participants are aware of the agenda and structure of the event. They may also share slides during a presentation.

For smaller events, it can be helpful to have two co-facilitators to moderate discussion. For larger events, it is helpful to have one main facilitator and several breakout room facilitators.

Breakout Room Facilitator(s)

Responsible for leading discussions or activities in breakout rooms.

Technology Support

Responsible for managing platform logistics, including muting participants when necessary, recording the session, and launching breakout rooms.

It can be helpful to assign one organizer to provide technology support for any participants that have trouble connecting. In the case of technical difficulties, the technology support organizer can troubleshoot with the participant in a breakout room.

Note-Taker

Depending on the type of event hosted, it may be helpful to have a note-taker. Note taker roles can range from summarizing discussions for stakeholders who could not attend the event, or including content on an external whiteboard such as Jamboard during a brainstorm activity.

Q&A Moderator

Responsible for answering questions in the chat box as they are submitted OR compiling the questions from the chat box and reading them to the facilitators or panel guests during the Q&A period.

Depending on the number of organizers available, you may choose to combine the “technology support” and “Q&A moderator” roles.

Post-Event Follow Up

Responsible for sending “thank-you” messages to attendees and also following up with any promised post-event materials.

CHAPTER 11

Facilitation Skills

“[During online events] having well facilitated discussions and engaging presentations are much better than being talked at.” – Anonymous Survey Participant

What does effective facilitation look like?

The facilitation skills necessary to host a successful in-person event are similar to those required to facilitate online programming. The following section will not reproduce recommendations for successful facilitation skills, which are widely documented elsewhere (see [References](#)). Rather, it will highlight some of the unique facilitation challenges that students faced while hosting and testing virtual events during the 2020 CityLAB SIR program.

- **Maintaining focus:** Whether your event is interrupted by an unmuted microphone or by a parallel discussion that emerges in the chat box, it is critical that as a facilitator, you redirect participants' attention to the event topic.
 - If a discussion begins in the chat box that detracts attention from the main topic of discussion, address the chat box comments directly.
 - For example: If you would like participants to leave comments until the end of a presentation and not type in the chat box, you might say: "[insert name] has just pointed out in the chat box that [insert chat box comment]. That's a really great point, that we're going to talk about a little bit later in this presentation. In the meantime, I would kindly ask that folks reserve their comments in the chat until the end of the presentation, as I regrettably can't focus on the chat box while sharing my screen".
- **Using humor:** In the face of technical difficulties, humor can be a great way to ease social tension while ensuring that the event remains on schedule.
- **Speaking directly to participants:** Online platforms such as Zoom automatically provide facilitators and participants with the opportunity to indicate their on-screen name. As a facilitator, encouraging participants to change their username to their preferred name and addressing participants by their preferred name is a great way to promote community and show participants that their presence is acknowledged despite the online environment.

CITYLAB SIR CASE STUDY: NAVIGATING DISRUPTIONS

In the fall of 2020, SIR students practiced facilitating small events where other students were designated as event ‘disruptors’. Practicing group facilitation in the face of technical difficulties provided students with the opportunity to improve their dialogue skills, and remain calm when ‘disruptors’ unmuted their microphones or tried to take control of screen-sharing functions during an event. Instead of getting flustered when participants unmuted by mistake, students learned to use simple prompts such as: “Hi [insert name], I noticed that you’ve unmuted yourself. Do you have a question about this slide?”.

- **Ensuring clarity:** Speaking slowly and clearly are especially important in an online environment, where technical glitches such as lags in video may occur.
- **Smooth transitions:** In a virtual environment, simple facilitation strategies such as greeting participants as they enter a room can become choppy and awkward. Using music during transition periods and practicing alternative ways of communicating during down-time in the event can ensure that the event runs smoothly.
 - For example: On a platform such as Zoom, it can take up to 1 minute for participants to return from breakout rooms. Often, some participants return early from breakout rooms and do not

want to engage in conversation. Instead of asking open-ended questions to participants during transition times such as “how were the breakout room discussions?” consider asking yes-or-no questions that participants can respond to using a simple hand gesture or Zoom reaction feature. Pointed yes-or-no questions will allow participants to engage during transition times without needing to unmute in front of the entire group. They will also take up less time than longer questions and keep your event on schedule

CITYLAB SIR CASE STUDY: TRANSITION MUSIC

In the fall of 2020, SIR students were faced with a reoccurring challenge: how could they make the first few minutes of a video call less awkward? Students decided to start playing music as an informal way to greet attendees as they were joining virtual events. The music helped to reduce awkward silences, allowed participants to ensure that their headphones were working, and made transitions into events smoother.

Creating Community Online

The following strategies can be used to build community when facilitating events online. More information about specific virtual

platforms and online tools can be found in the Virtual Resources section of this Toolkit.

Synchronous Introductions

In a virtual environment, you can simulate in-person introductions by inviting all participants to unmute their microphone and introduce themselves. When facilitating introductions, it is important to create structure to minimize audio feedback.

The following strategies can be used to add structure to online introductions:

- Facilitate introductions by reading through the participants list to ensure that no one gets missed.
- Ask participants to 'pass the mic' by reading the name of another participant once they are done introducing themselves.
 - For example: "My name is [insert name] and I'm excited to be at this virtual event! I will invite [insert name of another participant] to introduce themselves next."
- To add additional structure to the 'pass the mic' strategy, ask all participants to use the 'raise hand' feature on a platform like Zoom to raise their hands. Participants will lower their hands once they have introduced themselves so that participants know who has yet to speak.
- Use breakout rooms to invite participants to introduce themselves in a smaller group environment.

Asynchronous Introductions

Platforms like Flipgrid can allow participants to record a short introduction and view the introductions of others before your event begins. This method can be helpful when facilitating large groups in a small time frame where there may not be time for synchronous introductions.

The chat box on platforms like Zoom can also be a place for participants to introduce themselves via text, to the group. To facilitate chat box introductions, invite participants to type their name and any other relevant information in the chat as they enter the call.

Ice-breaker Activities

Short, ice-breaker activities can be used to facilitate introductions and build community online. Sample activities include:

- Multiple choice polls via Zoom that gauge the preferences or mood of participants.
- Word clouds via Mentimeter that allow participants to type one-word answers and ask questions such as:
 - What do you hope to get from this event?
 - Where are you joining this event from?
- Scavenger hunt challenges that invite participants to find a certain item in their physical environment (for example, something that they could not live without or something that starts with the same letter as their first name) and share it with other participants in the virtual space of a breakout room.

Additional interactive platforms with ice-breaker potential are included in the [Selecting a Virtual Platform](#) section of this Toolkit.

Virtual Backgrounds

Encouraging participants to come to the meeting with a virtual background that reflects one of their interests can be a great way to informally create community online.

Keep in mind: changing virtual backgrounds requires some knowledge of how to use

background effects on a platform such as Zoom. If you invite participants to change their backgrounds, always provide instructions for how to accomplish this in advance!

Faces over Boxes

Encouraging participants to keep their cameras on can help keep participants engaged and promote a sense of community during an event.

Sample introduction: "During this event we will be promoting a 'faces over boxes' approach. For the safety of all participants and in the spirit of building community, we encourage you, whenever possible, to keep your camera on during this session."

Recording Sessions

For smaller, discussion-based events, recording may deter some attendees from participating. When reflecting on your event goals, consider whether the benefits of recording the session outweigh the importance of strengthening the sense of community. Not all events are conducive to being recorded!

Breakout Rooms

Depending on the size of your event, interactive activities take time! Breakout rooms can be a good way to reduce the time taken for introductions in larger event settings. Small breakout sessions of 4-8 participants can also be used for short ice-breaker activities or discussions.

CITYLAB SIR CASE STUDY: VIRTUAL BACKGROUNDS



Image: Inspired by the Climate Change Resiliency group, SIR students changed their backgrounds during a Project Management lecture.

When facilitating introductions during a virtual community meeting, SIR students invited participants to share their name, the neighbourhood that they represented, and their favourite cookie flavour. Integrating a light-hearted prompt about cookies into introductions allowed participants to become more comfortable in the virtual space. Some participants even ended up shared their favourite cookie recipes during the event!

CITYLAB SIR CASE STUDY: ICE-BREAKERS

When facilitating introductions during a virtual community meeting, SIR students invited participants to share their name, the neighbourhood that they represented, and their favourite cookie flavour. Integrating a light-hearted prompt about cookies into introductions allowed participants to become more comfortable in the virtual space. Some participants even ended up shared their favourite cookie recipes during the event!

Setting Online Expectations

Participants will enter your event with different ideas about etiquette in an online environment. At the beginning of an event, it is important that you review online etiquette, share the event schedule, and clearly communicate your expectations for the session.

Share the Schedule: at the beginning of an event, post a copy of the schedule in the chat box. Being transparent about your event schedule will:

- Keep stakeholders engaged.
- Keep you accountable to taking breaks and ending the event on-time.

Questions to Consider	Sample Responses
<i>What do I expect of participants?</i>	<p>I expect that all participants:</p> <ul style="list-style-type: none"> • Keep their cameras on during the session, and their microphones muted. • Use the raise-hand feature when asking a question. • Use the chat-box when asking a question. • Reserve their questions until the end of an event. • Ask questions throughout the event. • Use their preferred name and pronouns when setting their on-screen name. • Engage with organizers and other participants in a respectful and constructive manner.
<i>What can participants expect from me, as a facilitator?</i>	<p>Participants can expect me to:</p> <ul style="list-style-type: none"> • Communicate clearly and listen actively. • Start and end the event on time. • Provide participants with multiple ways to engage (speaking, typing in the chat box, using an external feedback tool like Jamboard). • Dedicate time during the event to answer questions. • Provide contact information to participants, should they have additional questions after the event. • Follow-up after the event with a summary of the event outcomes, and a concrete list of next steps.

Planning for Technical Difficulties

Technical difficulties are inevitable when hosting virtual events. The following tips can help you to plan for, and mitigate, technical difficulties.

General Tips

- Anticipate technical difficulties by building extra time into your event.
- Assign one or two organizers who are able to help participants who are experiencing technical difficulties.
 - If needed, the designated organizer can be sent into a breakout room with the participants to work through any technical difficulties.
- Create a back-up plan and communicate your plan to the other organizers and event participants.
 - For example, when going through introductions, the facilitator should mention that “[insert name of organizer] will take over as facilitator should

my screen freeze”.

- When creating a back-up plan, consider:
 - Who will take over for the facilitator if they are kicked off the call?
 - Who is responsible for muting participants if there is audio feedback?
 - Who will share the presentation slides if the presenter’s screen sharing doesn’t work?
 - What steps will you take in case of major technical difficulties? Will you ask participants to take a break earlier in the event?

Mitigating Audio Feedback

- In a platform such as Zoom, you can set the call to “automatically mute participants” as they enter the event to minimize audio issues.
- When reviewing online etiquette, ask all participants to mute their microphones when not speaking and to use headphones whenever possible.
- If a participant is unmuted while not speaking, ask the participant if they would like to contribute to the discussion before automatically muting them.
 - For example: “Hi [insert name of participant], I noticed that you unmuted your microphone. Do you have a question for our presenter?”

Navigating Internet Issues

- To reduce the likelihood of internet issues:

- Allow participants to “call-in” to the event.
- Minimize the number of external platforms or tools that participants are asked to use during the event (Mentimeter, Kahoot, Jamboard, etc.).
- Provide any large files such as videos to participants asynchronously, before the event.
- Encourage participants to close any programs that may be running in the background of their device while they are in the video call.
- Assure participants that even if internet issues arise, they will be able to share feedback asynchronously after the event (for example, via email or a formal feedback form).

Communication

- In a platform like Zoom, the private chat feature can be a great way to communicate privately and efficiently with other organizers during an event.
 - In a Zoom call, organizers can message other organizers or attendees individually.
 - In a Zoom webinar, organizers can message other organizers individually or message all organizers (without attendees) collectively.
- The chat feature in a platform such as Zoom will not work if an organizer’s internet crashes or they are completely removed from a call.
 - Exchanging phone-numbers or another form of non-internet based communication among organizers can ensure that communication lines remain open even if technical issues arise.

PART IV

ACCESSIBILITY CONSIDERATIONS

Ensuring that your event is accessible to all stakeholders is a critical component of hosting a successful engagement event. The following section is not an exhaustive list of virtual accessibility resources. Rather, it is intended to get you thinking about some of the easy ways that you can reduce barriers to entry when planning virtual events. Prior to any event, it is important to provide stakeholders with the space to indicate any accommodations that they might require in order to meaningfully engage in your virtual event.

Closed Captioning

Several of our survey participants cited closed captioning as a critical component of the virtual engagement events that they attend, and can help to increase participants' focus during an event. The following programs provide automated (AI) closed captioning services.

- Zoom Live Captioning (built-in)

- Otter.ai Live Captioning and Transcripts ([external platform](#) that requires a paid account)
- Microsoft Teams Live Captions (built-in)

Keep in mind: on many platforms, including [Zoom](#), AI generated captions are not accurate enough to support folks who rely on live captions to participate in virtual events. However, trained manual captioners can be integrated into platforms such as Zoom using the “assign Closed Captions” feature.

Flexible Formats

Wherever possible, allow participants to engage with content in different ways.

- Provide access to slides or other presentation content in advance of your virtual event.
- When asking questions during a group discussion, ensure that the questions are also provided in the chat box.
- If questions or comments are submitted by participants via the chat box, ensure that they are also read aloud.
- Just like during an in-person event, describe any slides or images that you share out loud.
 - [McMaster’s Accessibility Hub](#) provides additional information about making presentation slides more accessible.
- Interested in providing content in multiple languages? Platforms such as Zoom provide the option of designating hired language interpreters as part of online events through the “[Interpretation](#)” feature.

Digital Literacy

In an online environment, you cannot assume that all participants are familiar with the features on platforms such as Zoom.

- Provide participants with a platform guide when you send any event links.
 - For a list of sample guides for Zoom and other platforms see Appendix B.
- Describe platform features before using them.
 - For example: “During the question period, we will be using the ‘raise-hand’ function on Zoom. To ask a question, please select the ‘reactions’ button that looks like a smiley face at the bottom of your screen. Then, select the hand icon on the left side to raise your hand.”
 - For example: “We will now be splitting into breakout rooms. When you see a prompt on your screen, please select ‘join’ to enter the breakout room for a guided discussion. The breakout rooms will last for 15 minutes, and then everyone will automatically return to the main room. At any time, you can leave the breakout room by selecting the blue ‘Leave Room’ button at the bottom right corner of your screen.”

Bandwidth Constraints

To minimize bandwidth barriers, integrate the following strategies.

- Provide call-in options for the virtual event.
 - On a platform such as Zoom, dial-in options are

automatically enabled when you create an event. Ensure that you send the entire event invite (with the event ID, password, and all international numbers) so that participants have the option of calling-in.

- Providing as much information as possible in advance.
 - If you intend to share slides, make them available in advance so that participants who call-in to the event can follow-along to the presentation.
- Limit the number of external platforms participants are required to use.
- Ask participants to turn-off their cameras, particularly during larger events.

Asynchronous and Offline Options

Providing asynchronous options can help to accommodate stakeholders who have limited internet access, timing conflicts with the synchronous event, or technical difficulties accessing the event.

- Asynchronous options extend to event promotion too! If you are promoting your event exclusively online, then stakeholders without internet access may not know about the event, even if they are able to attend by calling-in.
- In addition to hosting an online event, consider providing ways to share information asynchronously or offline.

Sample Engagement Methods	Mail-Out Survey	Online Survey
<i>Asynchronous</i>	✓	✓
<i>Offline</i>	✓	

CITYLAB SIR CASE STUDY: ASYNCHRONOUS OPTIONS

In the fall of 2020, four SIR students hosted an event where some participants had poor internet connection and dropped off the video call half-way through the event. To ensure that all participants were given the opportunity to provide feedback, the students connected with participants who dropped off the call asynchronously after the event via email.

Event Scheduling

- When scheduling the day and time of your event, consider your audience.
 - In an online environment, participants may be joining from around the world, so it can be beneficial to host multiple sessions that align with different time zones.
 - Just because stakeholders are located in the same time zone does not mean that they are all

available at the same time! Consider hosting multiple events on different days and times to accommodate folks with different work/life schedules.

- Wherever possible, record the event. This provides stakeholders who can not attend the event live with the opportunity to tune into the event on their own time.
 - If you choose to record an event, ensure that all participants are made aware that the event is being recorded before the event begins.
 - Recording might not be beneficial for all types of events. In smaller, conversation-based events, you might decide not to record to promote a stronger sense of community and respect the privacy of participants.

PART IV

VIRTUAL RESOURCES

Selecting a Virtual Platform

“Including [platforms] like Menti and Jamboard [is] a fun way of getting participants involved and critically thinking about the information being presented.” – Anonymous Survey Participant

Participants in our virtual engagement survey unanimously indicated that they enjoyed using Zoom for video conferencing. Of these same respondents, 78% stated that they enjoyed using Microsoft Teams, while 44% of respondents who had used Webex in the past enjoyed using Webex. Some respondents commented that when they plan virtual events, they are most likely to use Zoom because many of their stakeholders are already familiar with the interface.

The following section primarily highlights facilitation opportunities via Zoom, with additional information about alternate video conferencing platforms and tools for hosting interactive activities.

Video Conferencing via Zoom

All McMaster University staff and students have access to licensed Zoom accounts using their Mac ID and password. For more information about accessing Zoom as a McMaster student or staff member, visit the [website of McMaster University Technology Services](#). Individuals without access to McMaster Zoom accounts can host events via Zoom using a free account for up to 40-minutes at a time.

What is the difference between a Zoom Call and a Zoom Webinar?

	<i>Benefits</i>	<i>McMaster Staff and Students</i>	<i>Non-McMaster Partners</i>
<i>Zoom Call</i>	An ideal platform for public meetings and events between 2-100+ participants.	Access to unlimited Zoom calls for unlimited minutes with up to 300 participants.	Access to unlimited Zoom calls for 40 minutes each with up to 100 participants.
<i>Zoom Webinar</i>	An ideal platform for larger events such as panels, where attendees are not asked to actively engage. During a Zoom webinar, attendees are split into “participants” and “panelists”. Participants cannot turn on their cameras or microphones, and cannot see other attendees. Panelists can chat amongst themselves using the chat feature.	No free access.	No free access.

Zoom User Guides

Listed below are some helpful user guides curated by Zoom that may help community engagement practitioners design their event.

Free Account[Zoom Meeting Roles](#) (host, co-host, alternative hosts, participants)[How to Record Meeting Audio and Video](#)[How to Pre-Assign Participants to Breakout Rooms](#)[Managing Breakout Rooms](#)[How to Mute and Unmute Participants](#)[Sharing Screen, Content, or Second Camera](#)[Sharing and Playing a Video](#)[Closed Captioning and Live Transcription](#)*Alternate Platforms*

Although Zoom was the preferred virtual event platform identified by survey respondents, other platforms including Microsoft Teams, Webex, and Gather.town are available.

McMaster Staff and Students

The following chart is adapted from the McMaster Web and Video Conferencing Guide developed by University Technology Services, and [accessible here](#). The chart serves as a high-level summary of the video conferencing platforms available to McMaster staff and students.

Access

Zoom	Free for unlimited meetings with no time limits for up to 100 participants. Can be downloaded directly .
Microsoft Teams	Free for unlimited meetings with no time limits for up to 250 participants. Can be downloaded directly .
Webex	Free for unlimited meetings with no time limits for up to 1000 participants. Must be specifically requested .

Community Partners

The following chart provides a summary of some of the free tools accessible to community partners that do not have access to McMaster video conferencing accounts.

	Access	Key Features
Zoom	Free for unlimited 40 minute meetings of up to 100 participants.	<ul style="list-style-type: none"> • Breakout Rooms • Screen sharing • Interactive whiteboard with annotation tools
Webex	Free for unlimited 40 minute meetings of up to 50 participants.	<ul style="list-style-type: none"> • Screen sharing • Strong security features • File sharing
Rally	Free for unlimited meeting times for up to 12 participants.	<ul style="list-style-type: none"> • Breakout Rooms • Private tables in breakout rooms • Broadcasting capabilities
Wonder	Currently free for up to 1500 people, with the ability to hold 15 people per interactive breakout room. *Usage-based pricing will be introduced in the future but a free version will still exist.	<ul style="list-style-type: none"> • Interactive breakout rooms called "Circles" • Set ice-breaker question • Broadcasting capabilities
Gather.town	Free for up to 25 users.	<ul style="list-style-type: none"> • Provides an interactive event platform with clickable maps • Mimics an in-person conference or event where people can "walk" up to each other • Broadcasting capabilities

Interactive Tools

Integrating interactive activities into your virtual event can be a great way to keep participants engaged. Although this is not an exhaustive list, some of the platforms that were tried or recommended during the 2020 CityLAB SIR are listed below.

Virtual Brainstorming

Tool	Description	Benefits
LucidChart	A collaborative data visualization tool that allows participants to add text and images to create flow-charts.	<ul style="list-style-type: none">• Provides a detailed library of sample flow-charts• Up to 3 editable flow-charts can be created
Jamboard	A slide-by-slide digital whiteboard tool that allows collaborators to add text, drawings, or photos to a series of editable slides.	<ul style="list-style-type: none">• Very easy to use• Free• Stakeholders do not need an account to use• Collaboration can choose to remain anonymous
Mindmup	A brainstorming tool that can be used to create and collaborate on visual mind maps.	<ul style="list-style-type: none">• Can create an unlimited number of mind maps• Can save large mind maps over 100 KB• storage for upto 6 months• Option to save maps on Google Drive• Offers options to attach documents and images

Miro

An infinite digital whiteboard tool that allows collaborators to create mind maps and add text, sticky notes, and drawings to custom or pre-set templates.

- Offers 3 free active boards
- No limit to number of collaborators
- Provides pre-made templates
- Makes collaboration easy
- Offers integrations (e.g., Teams, Google)

Mural

A slide-by-slide digital brainstorming and whiteboard tool that allows collaborators to add sticky notes and text to pre-organized slides.

- Stakeholders do not need an account
- Provides step-by-step resources for implementation and engagement
- Provides a library of organized charts and templates

Stormboard

A digital post board that allows collaborators to add virtual sticky notes.

- Offers 5 free workspaces
- Integrated with Microsoft Office 365, Google Workspace, etc.
- Free version allows for basic reporting and analytics
- Allows teams to link similar ideas together and avoid duplication of ideas

Scribble

An infinite digital whiteboard tool that allows collaborators to draw on the board.

- Very easy to use
- Participants can draw or point to objects without an account
- Drawing space can be expanded using whiteboard feature

Zoom Annotations

A drawing tool built into Zoom that – when enabled – allows meeting participants to draw or write on a shared screen or digital whiteboard.

- Participants can annotate without needing an external platform (if on a Zoom call)

Quizzes and Games

Tool	Description	Benefits
Kahoot!	An educational platform that allows participants to join custom or pre-made quiz challenges using a 4-digit code, and compete against other participants synchronously, during an event.	<ul style="list-style-type: none">• Very easy to use• Participants join quiz and compete against others
Icebreaker	An event platform that prioritizes community-building icebreaker activities.	<ul style="list-style-type: none">• The free, personal events for up to 40 participants

Polls and Feedback

Tool	Description	Benefits
Kudoboard	A collaborative post board that allows participants to share messages as if contributing to a digital greeting card.	<ul style="list-style-type: none">• Provides collaborators with the option to send personalized messages, comments, videos, and photos.• Collaborators can submit comments and reactions at any time.
Menti	An interactive presentation platform that allows presenters to create and integrate polls or quizzes into their presentations.	<ul style="list-style-type: none">• Provides quick, real-time audience data.• Helps simplify data.• Can reach an unlimited audience.• Ability to create unlimited presentations.
Meeting Pulse	An interactive event tool that allows real-time polling, Q&A and surveys	<ul style="list-style-type: none">• Free version offers 3 polls per event.• Free version allows unmoderated Q&A.

Zoom Polls

A polling tool built into Zoom that allows presenters to ask participants multiple choice questions and share the results.

- Easy to use and built into the platform
- Participants can access polling on mobile devices
- Hosts can create a maximum of 25 polls per event. Each poll can have a maximum of 100 questions.

Asynchronous Activities

Tool**Description**[Kahoot!](#)

An asynchronous tool built into the synchronous Kahoot! Platform that allows participants to join custom quiz challenges and complete them on their own time. In the asynchronous format, participants can still compare their quiz scores to those of other participants.

- Very easy to use
- Can be used as a p engagement for the m
- Can be used as a p creative way

[Flipgrid](#)

A video sharing platform that allows participants to submit short video messages asynchronously in response to a provided prompt. Participants can also view videos submitted by other participants.

- Can be used to faci events, where greeting

Tips for Integrating Interactive Tools

- Provide multiple ways to engage!
 - Bandwidth constraints may prevent some stakeholders (including those calling-in to the event) from participating in activities on an external tool.

- If you are planning to use an external platform to host an interactive activity, it is critical that all stakeholders are able to participate, even if they cannot access the external platform.
- For example: when using Jamboard in a brainstorming session, ensure that participants are able to post directly onto the Jamboard, or share ideas by speaking or via the chat box in Zoom and have those ideas included on the Jamboard by a notetaker or facilitator.
- Consider your audience and prioritize patience.
 - Not all stakeholders will be familiar with Zoom, let alone an external interactive tool. Provide participants with sufficient time to navigate to any external tools.
 - Whenever possible, post instructions for accessing external tools in the chat box.
- Provide opportunities for stakeholders to learn how to use the interactive tools.
 - For example: if using Kahoot synchronously during an event, consider providing stakeholders with an asynchronous Kahoot to complete when registering. This will ensure that stakeholders are comfortable using Kahoot before they attend your event (and the asynchronous Kahoot can be used to gather questions or feedback in advance!).

CITYLAB SIR CASE STUDY: JAMBOARD

During the CityLAB SIR, many students used [Jamboard](#) to gather stakeholder feedback. As part of the Neighbourhoods project, five SIR students hosted an event where notetakers in each breakout room transcribed the comments of event participants onto shared slides as participants were speaking. Similarly, four students in the Complete Streets project group hosted an event where stakeholders added text and images to Jamboard slides to share their ideas about good street and intersection design.

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Appendix A: Platform & User Guides

Platform Guides

The following online platform guides provide detailed instructions for hosting virtual events.

Zoom	https://support.zoom.us/hc/en-us/articles/360034967471-Getting-started-guide-for-new-users
Microsoft Teams	https://support.microsoft.com/en-us/office/microsoft-teams-video-training-4f108e54-240b-4351-8084-b1089f0d21d7
Webex	https://help.webex.com/ld-nyw95a4-CiscoWebexMeetings/Webex-Meetings
Rally	https://www.notion.so/Rally-s-Event-Host-Handbook-938d258d983440ee93ff161570828235
Wonder	https://help.wonder.me/en/
Gather.town	https://support.gather.town/help/getting-started

Sample User Guide

The following Zoom user guide from the [University of California Academic Senate](#) was used by the students in the SIR Neighbourhoods group in the fall 2020 to familiarize stakeholders with accessing Zoom calls. User guides can be a helpful resource

for stakeholders who are unfamiliar with online event platforms. You can access a copy of the user guide by clicking [here](#).

Appendix B: Sample Emails

Students in the CityLAB SIR connected with stakeholders via email to promote their virtual engagement events. You can view examples of sample invitation and follow-up emails by clicking [here](#).

Appendix C: Pre-Event Document Samples

You can view high-resolution images of the pre-event document samples by clicking [here](#).

Appendix D: Summary of 2020 CityLAB SIR Projects

Project	Overview	Project Information
<i>Engage Hamilton</i>	Increasing public participation on the City of Hamilton's online engagement platform.	More information about the Engage Hamilton project can be found here . Read the final report here .
<i>Neighbourhoods</i>	Conducting virtual community engagement to connect neighbourhoods with the City of Hamilton in the face of COVID-19.	More information about the Neighbourhoods project can be found here . Read the final report here .
<i>Parks Master Plan</i>	Providing the City of Hamilton with virtual community engagement strategies to guide the development of the Parks Master Plan.	More information about the Parks Master Plan project can be found here . Read the final report here .
<i>Complete Streets</i>	Conducting virtual community engagement in Hamilton's Ward 1 community to learn more about Complete Streets design priorities.	More information about the Complete Streets project can be found here . Read the final report here .
<i>Climate Change Resiliency</i>	Conducting virtual community engagement with municipal climate leaders to inform Hamilton's Climate Resiliency Strategy.	More information about the Climate Change Resiliency project can be found here . Listen to some of the podcasts produced during the project here . Read the final report here .