National Center for Applied Transportation Technology

Virtual Engagement Guidebook

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About N-CATT

The National Center for Applied Transit Technology (N-CATT) is a technical assistance center funded through a cooperative agreement with the United States Department of Transportation's Federal Transit Administration (FTA). Operated by the Community Transportation Association of America (CTAA), the mission of N-CATT is to provide small-urban, rural and tribal transit agencies with practical, replicable resources that help them apply technological solutions and innovations. Among its activities, N-CATT produces a series of white papers, technical reports such as this document, and other resources, all of which can be accessed on-line at https://n-catt.org.

About this Document

This document was prepared for CTAA by Kearns & West as part of the N-CATT cooperative agreement between CTAA and FTA. Primary authors were Joey Goldman, Ross Green, Samantha Ramsey, and Kai Walcott of Kearns & West. Opinions expressed or implied in this document are those of the authors. Nothing in this document is to be interpreted as position, policy or guidance from the United States Government. Incidental use of companies' names or the names of their products is made solely to facilitate discussion and should not be regarded as recommendations or endorsements. Kearns & West is a national firm that specializes in the design and implementation of collaborative processes: virtual and in-person public engagement, mediation, and communications for transportation, community planning, energy, and environmental projects.

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Executive Summary

The purpose of this Virtual Engagement Guidebook is to offer a reference tool for transit agencies, mobility managers, human service transportation providers, tribal transportation programs and metropolitan planning organizations (MPOs) that seek to expand or diversify their practices for collaborating with their teams, policymakers, stakeholders, partners, and members of the public. The guidebook highlights industry practices, approaches, and tools available.

Virtual engagement practices have been around for many years, but the COVID-19 pandemic ushered in a major shift from in-person to virtual engagement as transportation organizations focused on ways to continue to involve their partners, community members, and riders in their decision-making processes. With differing levels of success, most organizations moved quickly to use virtual platforms for meetings and webinars for everyday involvement. As the pandemic continued on, many adapted by investing in new communications tools and by testing approaches they had not previously tried. Ultimately most transportation organizations found tools that worked for them and the communities they sought to engage, and many organizations expect to use virtual engagement tools to supplement in-person events or in lieu of them in the future.

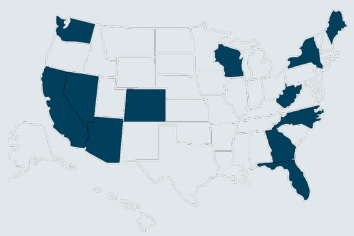
Virtual engagement provides several opportunities for transportation organizations to:

- Reconsider how they engage the communities they serve;
- Increase the size and diversity of their audiences;
- Make engagement more accessible to some communities; and
- Collaborate with other organizations.

Many different tools and approaches to virtual engagement exist. For an effective virtual engagement program, transportation organizations will seek a combination of tools that best meet their needs, because all tools have limitations. Individuals with limited access to or knowledge

Learn More

A map highlighting the geographic distribution of the Guidebook's case studies.



of communications technologies may be unable to join web-based meetings, while people with limited English proficiency or certain types of disabilities will be challenged by software constraints that may not accommodate interpretation, offer closed captions, or provide other communications options. As a result of these challenges and others, virtual engagement is not always a perfect substitute for in-person.

The guidebook focuses on three key motivators for public engagement – to inform, engage, and persuade – and identifies tools that can support a transportation organization's efforts to accomplish these. To illustrate these examples, the guidebook includes concise case studies from a mix of transit agencies, human service transportation providers, and MPOs, including the following:

- Asheville Rides Transit, North Carolina
- Boulder County Mobility for All, Colorado
- Center for Pan Asian Community Services, Georgia
- Eau Claire Transit, Wisconsin
- Greater Portland Council of Governments, Maine
- Hopelink, Washington
- Kanawha Valley Regional Transportation Authority, West Virginia
- Miami-Dade TPO, Florida
- Mountain Line, Arizona
- Neighbor Network of Northern Nevada, Nevada
- Tompkins Consolidated Area Transit, New York
- Valley Transportation Authority, California
- Yolobus and Unitrans, California

The guidebook highlights practices to make virtual engagement more successful. For example, defining a meeting or event's objectives and desired outcomes helps to ensure a clear understanding of goals and the purpose for the engagement effort. It also helps meeting organizers choose a meeting format or virtual platform to maximize participant engagement and achieve the meeting objectives. And once an approach is selected, planning, staffing, and practicing for the event are especially important. Virtual events require clear staffing and facilitation plans, as well as contingency plans in the event of software malfunctions, internet connectivity issues, or user error.

Tools for virtual engagement include project websites, videos, comment forms, fact sheets, digital newsletters, podcasts, meetings "in-a-box," kiosks, social media, and others. Platforms include webinar and virtual meeting platforms such as Zoom or Google Meet, livestreaming and video platforms like YouTube and Facebook Live, survey tools, and many others. The guidebook offers templates and step-by-step guidance for use by transportation organizations.

Case Studies

1. Introduction

! Defining Engagement

In this guidebook, we define engagement in terms of interaction: where information is shared by the organization and where the organization receives feedback, input, or comments.

Virtual public engagement, also known as e-participation within the context of governance, is public engagement facilitated by information and communication technologies (ICT), such as web tools. When virtual engagement first came to the fore, it was believed that it could increase citizen participation in public decision-making processes by reducing the time and effort required to access and respond to information, essentially making the process of participation easier for stakeholders.

Studies have found that with the increased use of online tools for virtual engagement, it takes less effort for individuals to participate in meetings and events, but there has been little increase in the overall number of participants in these public processes. Some believe that the reluctance of stakeholders to participate is based on low levels of motivation — relatively few stakeholders are aware of how issues affect them personally and are, therefore, less inclined to participate in a formal engagement process.

Thus, while this guidebook explores approaches to online engagement, technology alone will not necessarily increase the level public participation. ICTs can allow for wider, faster, and less expensive engagement processes, but they do not guarantee citizen buy-in or increase motivation among some population groups in the same ways that more personal, one-on-one traditional engagement approaches can.

The purpose of this Virtual Engagement Guidebook is to offer a reference tool for transit agencies, mobility managers, human service transportation providers, tribal transportation programs and metropolitan planning organizations (MPOs) that seek to expand or diversify their practices for collaborating with their teams, policymakers, stakeholders, partners, and members of the public.

This guidebook is designed to highlight industry practices that transportation providers have employed to address their engagement objectives, as well as identify the approaches and tools available to a wide range of organizations, including those with dedicated outreach staff and access to budgets and software tools to facilitate engagement efforts virtually, as well as smaller, resource-constrained agencies seeking to sustain or improve their engagement efforts virtually.

In this guidebook, engagement refers to the practice of organized interaction to serve an established objective. This interaction is achieved by soliciting participation, sharing information, and receiving feedback. These functions often take place in a meeting or workshop setting, but can also include any number of other efforts where an organization's representatives convene dialogs with select groups of participants and/or members of the public. Engagement occurs when these dialogs are focused on specific issues in and carried out in forums or using tools established by the transportation organization.

A transportation organization's engagement efforts might include soliciting input on a service plan, fare study, or other planning or policy initiative through workshops, town halls, open houses, public meetings, charettes, presentations, interactive surveys, and other events. Engagement could also involve regularly scheduled policy board meetings, hosting advisory committees, or other standing meetings with elected, appointed, or volunteer representatives and members of the public. It may also require staff to represent the organization at events, forums, or gatherings hosted by other organizations. Holding seminars, travel training and programs to educate users, ambassador programs—all are further examples of how transit agencies and other transportation programs seek to engage their communities, clients, and stakeholders.

Engagement is different from a pure marketing function, for example, where the objective is typically to attract riders, promote initiatives, or to build a brand, but not typically to solicit the input sought in an engagement effort. Marketing can include sharing information about service disruptions, legislative or tax proposals, new

! Navigation

If you are reviewing this guidebook in PDF format, the side bar is the guidebook's navigation tool. Look to the sidebar for links to, and page numbers of, relevant information and resources available, including templates, step-wise guides, and case studies.

You can either scroll to the page number or click on the hyperlinked name of the resource to be taken to that page. See the example below.

Page	Resources
110	Fact sheet how-to guide

products (e.g., fare media, specialized services, or new facilities), health guidelines, etc.

Likewise, a customer service function is established to address inquiries and provide support in response to consumer needs, based on their day-to-day experiences with a transit system or transportation program (e.g., route information, fare card technical issues, etc.). While customer service can field comments and concerns from an individual, the focus is not on initiating discussions about policies, programs, or plans – these are engagement objectives.

Using this Guidebook

In developing the guidebook, the research team contacted several transportation organizations – MPOs, transit agencies, human service transportation providers, and others – to gather input and insights on the tools and approaches that they use. Many of these organizations had limited experience with virtual engagement prior to the onset of the pandemic, and shared highlights of how they modified their in-person engagement approaches to become virtual. Some organizations had already been using virtual engagement tools and tactics for many years, but the pandemic led to shifting more of their engagement efforts to remote meetings or events. While some organizations offered exemplary narratives of successes with virtual engagement, most identified tradeoffs, including obstacles they faced when trying to support remote engagement efforts. These brief case studies are included in the appendix to this guidebook, but references are offered to illustrate examples in all the guidebook sections.

This guidebook highlights the diversity of practices and options available to transportation-focused organizations of any size. Each chapter addresses a different key topic.

Chapter 2 begins with an overview of the reasons, or "motivators," to engage various audiences. It focuses on approaches and ideas to help an organization identify its objectives in developing or expanding its engagement efforts. The discussion includes a definition of virtual engagement, its benefits and challenges, and rules and regulations governing engagement.

Chapter 3 covers virtual engagement activities. The guidebook provides an overview of the various types of meetings as well as non-meeting forms of virtual engagement. For each meeting or event, examples include the types of technologies that might be employed, tools appropriate for reaching various stakeholder groups, suggestions regarding the number of individuals who can be engaged via the technology, and trade-offs. Information in the sidebar next to each example briefly summarizes the key audiences, approaches, and reasoning for each application.

In addition to defining the activities, the chapter highlights how transportation-focused organizations can maximize the effectiveness of their virtual engagement efforts, offering practices for effective virtual meetings and strategies for soliciting meaningful feedback.

Chapter 4 provides information about how a virtual engagement effort can be implemented. The discussion includes descriptions of the many types of virtual engagement tools that are available, how tools can be used to support a transportation organization's engagement objectives, examples of how different organizations have used these tools, and specific examples of software. The chapter also includes a discussion about how to engage vendors to supply these tools and other considerations such as accessibility.

A discussion of building a culture of expanded public involvement in Chapter 5 is intended to illustrate how even a small transportation organization can expand its toolbox to promote more engagement with the communities it serves and its partners through equitable, accessible, and ongoing interactions. The concluding chapter also highlights how transportation organizations

! Icons

- Examples: refers to case studies and other examples that informed the guidebook.
- Learn More: refers to other pages or external material.
- Notes: highlights helpful information.
- Cost
- Time range
- Related to staff
- Accessibility
- Complexity
- Audience size/type
- Motivator
- Resource needs for agency
- Technology needs for participants
- Return to table of contents

INTRODUCTION

can use volunteers to support their efforts, can grow a more responsive social media presence, and can use engagement to build nurturing partnerships for the organization.

The guidebook's appendix features samples and templates that transportation organizations can tailor for their own purposes such as hosting meetings, scheduling events, and securing the resources needed to ensure successful engagement.

Focus on Equity and Accessibility for Virtual Engagement

Equitable virtual engagement is essential to ensure an inclusive community planning process: meaningful and creative ways to engage non-English speaking communities, people with disabilities, low-income populations, minority populations, and other underserved communities. In doing so, planners and facilitators expand the scope of opportunities to incorporate the voices of traditionally underrepresented communities into the conversation.

Equitable virtual engagement can be challenging at times. However, it is important for planners and facilitators to think beyond preliminary meeting constructs and tools. This will allow them to consider the quality of engagement, the effectiveness of engaging hard-to-reach communities, and methods to achieve wider and more meaningful representation in public decision-making.

Equitable Virtual Outreach

Effective engagement requires an understanding of potential power dynamics between a transportation organization or technical specialists and community decision-making roles; knowledge of a community's history, experience, culture, and language; familiarity with community resources; and an understanding of population characteristics, including how and where people use transit services, the limitations of the transportation network, how important transportation is compared to other services and activities, and general familiarity with the public participation process.

In developing the case studies in this guidebook, transportation program representatives often expressed concern that they were missing underserved populations in their virtual engagement efforts. Some organizations highlighted examples where they felt they had made some inroads, such as online interpretation and easy-to-access videos. While almost any outreach specialist will acknowledge that virtual engagement for a predominantly immigrant community is not the same as a face-to-face interaction at local community-sponsored event, the tools to encourage participation are largely the same. A comprehensive information distribution approach that focuses on hard-to-reach communities may be the most useful tool for pursuing more equitable virtual engagement.

The Digital Divide

The term digital divide refers to a population's limited access to communications tools, such as computers and smartphones, connectivity to the internet, and the capacity to comfortably access and navigate virtual services and technologies. For example, some population groups, such as older adults or low-income communities, have less experience with and access to communication technology tools than younger, more affluent populations. Not only is it more challenging for this group to participate in virtual activities, but they also have less experience using these tools, making virtual engagement unfamiliar and possibly uncomfortable.

Technology has made it easier to engage with people who speak languages other than English. These include:

- Internet browser settings can allow users to select their language of choice and automatically translate web pages.

- Virtual meeting or webinar platforms sometimes allow for on-demand interpretation (or multiple channels to accommodate different languages).
- Video players can embed subtitles, which can be presented in various languages.

These tools support more equitable engagement for various populations who can access these technologies.

Accessible Information, Outreach, and Meeting Tools

Equitable engagement means ensuring that all people have an opportunity to participate, regardless of disability. Virtual engagement has made it easier for some people with mobility limitations to participate because it negates the need to travel to a meeting site and potentially also encounter onsite accessibility obstacles. Meeting tools now feature closed captioning for people with hearing impairments, as well as on-screen slides and visuals. These include volume controls, options to download meeting materials into screen readers (rather than receive print-only versions), screen zoom features, and built-in accessibility technologies on computers and smartphones. Nonetheless, not all tools are accessible. Transportation organizations assessing virtual engagement tools should review and understand how accessibility features can be used. In addition, a skilled meeting facilitator will also confirm the accessibility preferences of meeting participants and work to ensure that information is communicated effectively during the meeting.

2. The Value of Public Engagement

Chapter Questions

1. What is virtual public engagement?
2. What motivates transportation organizations to engage stakeholders and members of the public?
3. What are the benefits and challenges of virtual public engagement?
4. How does virtual public engagement compare to in-person engagement?

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Photo credit: Jim Maurer

Communicating with Stakeholders & the Public

Motivators

Communicating with and soliciting input from the community it serves is an essential function of any public agency's decision-making process. Special interest groups may have the resources to influence policy and decisions without solicitation but it is critical that many citizens are engaged in good faith by their government to participate in the public process. At times agencies may feel the need to "check the box" to meet statutory requirements on public participation or release a statement to get out in front of a looming negative headline. Public engagement at its best can help enable participatory democracy where citizens meaningfully contribute to the decision-making process. This is especially true for local government, which has the unique advantage of being the closest to the people it serves.

Transit agencies are no different. A local bus route, rush-hour traffic, and air pollution exacerbated by car commuting are among the most common concerns and points of contact a citizen has with their government. Even in the most rural communities, public transportation plays a central role in where people live and how they move around their communities. Communications teams and public engagement specialists are tasked with ensuring that constituents are aware of and involved in the decisions made by their public transportation agency. Public engagement's focus can vary widely from notifying riders of a service disruption, to communicating community benefits of a new infrastructure project, to mobilizing voter support for a tax initiative.

This Guidebook focuses on three key motivators for public engagement:

- **Informing** – Deliver timely and credible information to transit riders, target stakeholders, and the general public.

- **Engaging** – Solicit community input and feedback on transit plans and proposals.

- **Persuading** – Secure buy-in and community understanding of transit projects or agency priorities.

For each motivator, many of the most popular outreach and engagement approaches can be transitioned to a virtual environment with few adjustments. Citizen advisory councils have been virtually facilitated on a video conference platform like Zoom, while public information meetings have been convened as live YouTube broadcasts. In other cases, it will be critical to identify an alternative effective virtual engagement solution. This guidebook is intended to help ask the right questions and connect users to helpful resources to design and execute effective virtual public engagement.

Gathering Public Buy-In

By **informing** riders and the public with timely and credible information and **engaging** stakeholders in good faith, transit agencies earn the credibility of **persuading** constituents about the efficacy of their next priority – a transit expansion, new service plan, or fare adjustment. Quality customer service, system transparency, and clear pricing may need to come before ballot initiatives, tax measures, or new product innovations. Therefore, an essential role of communications teams and public engagement specialists is to build public trust by lay the foundation of credibility, timeliness, and transparency.

Statutory Requirements

Transit agencies and other transportation organizations may be required to meet specific statutory requirements to promote public accessibility, transparency, and accountability. Transportation organizations are encouraged to consult with their legal counsel and compliance team about any requirements that may be in place for public engagement and to ensure that virtual engagement practices meet requirements.

Federal Funding

Any transit program or activity that receives federal funding, such as from the Federal Transit Administration, must comply with Title VI and the Americans with Disabilities Act (ADA). Specifically, federally funded agencies are required to:

1. Ensure that the level and quality of transportation service is provided in a nondiscriminatory manner.

2. Promote full and fair participation in transportation decision-making without regard to race, color or national origin.

3. Ensure meaningful access to transit-related programs and activities by persons with limited English proficiency.

4. Prepare and submit a Title VI/ADA Plan. (USDOT, 2012)

MPOs

Likewise, in accordance with 23 CFR 450.316, the Federal Transit Administration requires a metropolitan planning organization, or MPO, "to engage in a metropolitan planning process that creates opportunities for public involvement, participation, and consultation throughout the development of the Metropolitan Transportation Plan (MTP) and the Transportation Improvement Program (TIP)." Under this requirement, "MPOs must allow for:

- Adequate public notice of public participation activities
- Review and comment at key decision points in the development of the MTP and TIP
- Multiple, accessible participation formats, including

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electronic and in-person."

According to the US Department of Transportation, an MPO should also develop a collaborative and comprehensive Public Participation Plan that describes the proactive strategies, procedures, and desired outcomes of their participation activities. The FTA directs that the plan should be developed in "...full collaboration with the public and stakeholder communities, to be used in the development of the MTP and TIP, as well as to frame the strategies for public and stakeholder communication and collaboration in all phases of the planning process. The Participation Plan itself must be prepared by the MPO with a 45-day public review and comment period." (USDOT, 2019)

NEPA

The Federal Highway Administration enforces the basic decision-making framework and action forcing provisions established in NEPA, the National Environmental Protection Act.

NEPA requires "...agencies to seek input from stakeholders and the public throughout [a] project." Under the FHWA's Public Involvement Requirements, "each State must have procedures approved by the FHWA to carry out a public involvement/public hearing program." These procedures must provide for:

- "Coordination of public involvement activities and public hearings with the entire NEPA process.
- Early and continuing opportunities during project development for the public to be involved in the identification of social, economic, and environmental impacts, as well as impacts associated with relocation of individuals, groups, or institutions.
- One or more public hearings or the opportunity for hearing(s) to be held by the State highway agency at a convenient time and place for any Federal-aid project which requires significant amounts of right-of-way, substantially changes the layout or functions of connecting roadways or of the facility being improved, has a substantial adverse impact on abutting property, otherwise has a significant social, economic, environmental or other effect, or for which the FHWA determines that a public hearing is in the public interest.
- Reasonable notice to the public of either a public hearing or the opportunity for a public hearing. Such notice will indicate the availability of explanatory information. The notice shall also provide information required to comply with public involvement requirements of other laws, Executive Orders, and regulations." (USDOT FHWA)

The FHWA's Every Day Counts Initiative provides this online resource for Virtual Public Involvement.

State Requirements

Many states enshrine and expand on federal statutes in state law. For example, the California Environmental Quality Act (CEQA) and the Massachusetts Environmental Policy Act (MEPA) have environmental protection policies and compliance requirements similar to NEPA. The department of transportation in many states can provide engagement guidance based on environmental requirements and the different compliance regulations of various federal, state, and local funding sources.

Defining Virtual Engagement

In the simplest terms, this guidebook defines virtual engagement as any strategy to inform, engage, or persuade your community through the Internet and digital capabilities. Agencies of all sizes accelerated their transition to virtual engagement in 2020 to comply with shelter-in-place orders and social distancing guidelines due to the COVID-19 pandemic. Yet with these new constraints has come opportunity.

Benefits of virtual public engagement may include cost savings, greater reach, flexible platforms to manage community dialogue, and of course a safer environment during a pandemic.

Challenges of virtual public engagement may include software acquisition and management, public access to internet and technology, ensuring accessibility, and securing needed staffing or other required resources. There are also limitations on how a community may respond to digital engagement of which access to technology plays only a small part. Constituencies and demographics differ in their confidence using a given technology, their cultural associations with remote environments, or even their awareness of efforts by a transportation organization to engage them online.

In Practice

Boulder County Mobility for All, CO

Colorado's Boulder County Mobility for All (M4A) Program promotes accessible, affordable, and equitable multi-modal transportation options for residents of all backgrounds. Historically, these efforts have included public outreach and education on multimodal transportation options, as well as assistance funds for accessing local transit services. M4A's Technology Ambassador Program leverages community partners and volunteer power to offer transportation-related technology workshops to help community members of all ages and abilities feel more comfortable using transportation apps.

By migrating this ambassador training program to a virtual environment, M4A has overcome unique challenges of engaging constituents online who have limited technology proficiency, including the elderly, ESL riders, and people with intellectual disabilities. M4A is delivering these training sessions on YouTube, but they are also innovating in how they provide real-time and asynchronous support. Behavior changes come easier socially, so their emphasis is on not just offering a tutorial but facilitating a dialogue that builds trust and improves understanding.

Learn more about M4A on page 145.

Reasons For Virtual Vs. In-Person Engagement

Can virtual engagement be both (1) a substitute for traditional, in-person engagement efforts and (2) help transit agencies more effectively communicate to the communities they serve?

Challenges	Opportunities
• Software acquisition, management, and staff expertise • Privacy and data security • Digital divide / access to technology tools • Technology limitations for individual engagement • Quality of human interaction • Virtual meeting fatigue/level of interest	• Potential cost savings for agencies and time savings for participants • Greater reach and more frequent touch points • Flexible tools for participation (text, video, voice, multilingual) • Administrative controls for managing the dialogue • Accessibility options (real-time, automated) • Safety in a pandemic

Some of these considerations can present both challenges and opportunities, such as how an organization receives input during a meeting — there is no perfect substitute for the feedback and trust-building organizers can get from seeing constituents face-to-face. Traditional public comment periods at the end of an in-person meeting, however, can too often be ineffectual. Virtual engagement opens the door to a myriad of new tools to solicit real-time and in-depth community input. Live polling, online surveys, and videoconference breakout rooms all offer powerful functionality previously not available to many organizations. Digital platforms also solve for problems as diverse as eliminating travel costs for staff and guest speakers, reducing other costs that come with convening in-person, and encouraging participation from busier constituents who fall outside the usual suspects who traditionally attend public meetings. Even after the COVID-19 pandemic, public agencies may opt for hybrid models to take advantage of the benefits of in-person and virtual public engagement.

In Practice

Neighbor Network of Northern Nevada, NV

Before the COVID-19 pandemic, the Neighbor Network of Northern Nevada (N4) had planned an in-person summit to advance its mission to connect Northern Nevadans to inclusive, community-based services, volunteer opportunities, and affordable transportation. The regional MPO wanted to convene at-home caregivers to share the resources available to them to support better health and well-being for both the caregiver and the person receiving care. This included respite services for family care partners, companion services, personal care, social, recreational and educational activities, and access to affordable supplemental transportation and discounts on Lyft rides.

When local Shelter-in-Place orders made an in-person summit impossible, N4 migrated to two half-day virtual summits on Zoom. What surprised staff was that attendance exceeded expectations for the in-person summit. For at-home caregivers an opportunity to connect with others doing similar work without the need to leave their loved one for an extended period was exactly what they needed. N4 also succeeded in maintaining the collaborative feel of a summit. Breakout rooms with N4 staff and volunteer facilitators provided a venue for the caregivers to speak in smaller groups about their experiences, lessons learned, and where they would benefit from additional support.

The lesson? Context is critical. In some cases, the audience may prefer and benefit from a virtual environment.

Learn more about N4 on page 147.

Additional Guidance

Levels of Public Participation

Chapter 2 highlights simple motivators for a transportation organization to engage the public: to inform, engage, and/or persuade.

A variety of research, however, has been conducted that adds other categorizations or levels to define commonly recognized public participation approaches, including consulting, involving, collaborating, and empowering stakeholders (see table below). For example, in the IAP2 model, each public participation function is more complex, and requires additional effort and resources. Regardless of the level of participation an agency chooses, members of the public will participate at the level which most suites their needs and desires.

The table below is adapted from the IAP2 Spectrum (International Association for Public Participation, 2018).

Learn More

The International Association of Public Participation (IAP2) is a global federation concerned with the promotion and improvement of stakeholder participation in public decision-making processes. Founded in 1990, IAP2, its affiliates, and chapters share information, advocate for public participation, conduct research and provide technical assistance to improve engagement processes.

To learn more about IAP2, their resources, membership opportunities, trainings and services, go to https://iap2usa.org/.

	Inform	Consult	Involve	Collaborate	Empower
Public Participation Goal	Provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/solutions.	Obtain public feedback on analysis, alternatives, and/or decisions.	Work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	Partner with the public in each aspect of the decision including the development of alternatives and identification of the preferred solution.	Place final decision making in the hands of the public.
Promise to the Public	Keep you informed.	Keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	Work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	Implement what you decide.

INCREASING IMPACT ON THE DECISION

Inform

"Inform" is the first level of public participation and is intended to simply share information with members of the public, with no intention of receiving feedback. The purpose, therefore, is to ensure that there is a level of awareness within the general population.

Consult

"Consult" is the second level of public participation and allows for a small degree of public input in a decision-making process. In consultation processes, agencies ask members of the public for feedback on ideas which have already been developed prior to a final decision being made. This is typically done at clearly defined points in the decision-making process and is generally not iterative in nature. At this level, the agency has the power to accept or reject the feedback received without having multiple engagements with members of the public.

Involve

The third level of participation "Involve," allows members of the public to engage in ongoing discussion and share feedback, usually from the beginning of the process. In this level of participation, while the public can provide input at multiple opportunities, unlike "Consult," the agency still has the power to make the decision without needing to reach a consensus with the public.

Collaborate

Unlike the level prior, at the fourth level of participation, "Collaborate," the intent is for the agency to try to reach a consensus with the public. That is, the agency enters a partnership with the public and strives to incorporate input as much as possible. However, before engaging in a collaborative effort, the agency should clearly state the degree to which a consensus will be sought as they are still the ultimate authority.

Empower

The highest and final level of participation "Empower," facilitates a transition of power and authority from the agency to the members of the public, by enabling stakeholders to be the primary decision-makers. This is most clearly exemplified by voting. This level of participation is often not pursued as it is incredibly complex, resource intensive, time consuming and challenging to execute successfully.

The level of public participation an agency pursues will depend on the nature of the project being undertaken, internal resources, external factors (such as legal requirements), as well as the agency's will to incorporate public opinion and feedback.

Before conducting any public participation process, it is important for an agency to first identify and understand the point at and degree to which public input will have influence. Being honest and transparent about these findings with stakeholders can not only assist in managing public expectations, but better enable the public to focus their attention, effort, and resources on areas they can change (United States Environmental Protection Agency, 2018).

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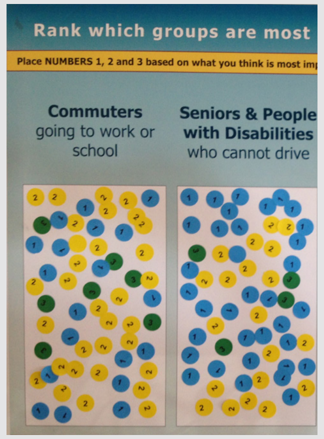
Virtual Engagement

3. Tools and Approaches

Chapter Questions

1. What types of meetings and events do transportation organizations typically hold?
2. What are the virtual options for these meeting types?
3. What practices contribute to successful virtual meetings and events?
4. Are there ways agencies can engage virtually without scheduling meetings and events?

Section page photo credit: City of Eau Claire
Photo credit: Marcus Aurelius from Pexels



Traditional engagement tools can often be replicated by virtual engagement tools.

Successful online engagement requires a strong foundation of good engagement practices.

Online engagement provides the benefit of outreach through a myriad of tools. However agencies require thoughtful and inclusive engagement practices to start. Without them, agencies will be limited in the participation they can amass and sustain over time, especially from stakeholders who do not tend to take part in decision-making processes.

An agency can begin to highlight the activities that can be translated into an online form and those that need to be adjusted to improve outcomes by reflecting on the following:

- What has not worked well; and
- Who has not been reached.

For example, a recurring community working group meeting with consistently high attendance may be easily moved to an online format, if members are computer literate and have access to a computer and the internet. However, ad-hoc events with historically low rates of participation may face more challenges drawing an online crowd. Once an agency has determined its pre-transition strengths and weaknesses, it can begin to address the gaps during the transition process.

Low rates of participation among individuals from marginalized and underserved communities is one common gap that is common with in-person engagement. This low rate of participation can arise from many factors such as a lack of trust, disinterest (typically stemming from an agency's inability or desire to appropriately communicate information about a project), little access to resources, and high opportunity costs for participation. The best way to determine what a specific community needs, as well as their current and potential barriers to participation, is by asking community members and representatives.

Overview

Numerous articles and definitions about the value of meetings exist across disciplines, but an often-quoted 1976 Harvard Business Review article noted that one of the functions of a meeting is that it helps "every individual understand both the collective aim of the group and the way in which his own and everyone else's work can contribute to the group's success." (Jay, 1976)

By bringing people together with a common purpose, a clear set of objectives, and actionable outcomes, a meeting – in person or virtual – can be a particularly valuable tool for a transit agency or transportation organization to get buy-in from partners or members of the public, seek feedback or direction on issues of concern, or gauge attitudes about initiatives or proposed approaches. Some meetings can be expressly about educating participants, while others may be focused exclusively on accepting comments. When incorporated into a process, meetings of all types can represent the building blocks of a comprehensive engagement approach.

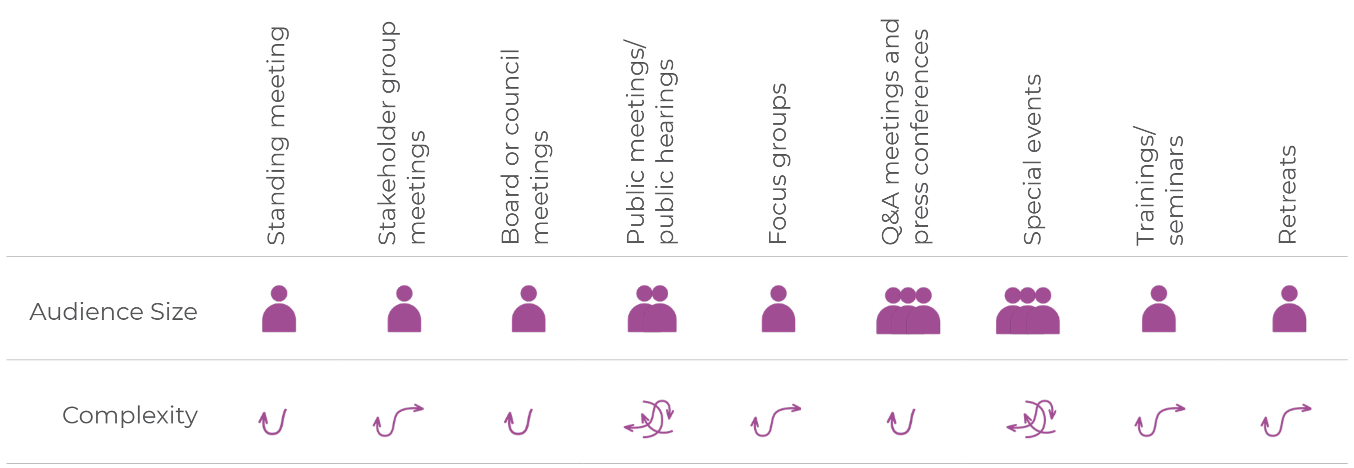
This chapter reviews different meeting designs, occasions for which these meeting designs might be applied to transit agency or transportation organization events, practices for more effective virtual meetings, and other virtual engagement tools that can be used in combination with meetings or as standalone programs.

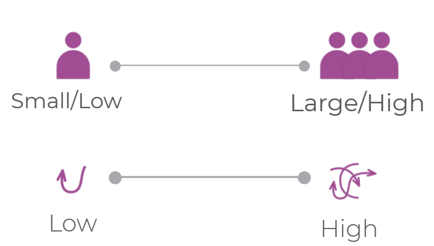
Meetings and Events

MPOs, transit agencies, and other transportation providers have a variety of tools available to them to conduct meetings and lead public events. Meetings are one of the most important tools in the public engagement toolbox because they allow for direct interaction between staff, planners, consultants, and members of the public.

Meeting Types

Transportation providers and transit agencies conduct meetings for a wide range of different reasons. Some meetings are standing meetings with regular participants providing ongoing feedback and input, while other events may be called based on special initiatives or plans, such as the adoption of a new fare structure, a service plan update, facility design, etc.





Standing Meeting

An accessible advisory committee meeting might be held weekly, monthly, or quarterly. These standing meetings typically involve individuals who are relatively familiar with the transportation organization, may have been appointed to serve in a particular capacity, and may or may not allow for members of the public to participate as observers or commenters. Most standing meetings are focused on advising on the day-to-day business of an organization, oversight, or sharing opinions on policy or other specific areas within an organization's purview.

Other Ways to Engage Participants in a Standing Meeting

In-person, virtual and hybrid meetings can use technology tools to support dialog, help prioritize options, and collect and synthesize opinions in real time. Software like Poll Everywhere or Mentimeter allows meeting participants to vote on their preferences. During the development of the MOVE Central Arkansas Plan for Rock Region Metro (in the Little Rock region), meetings with an appointed group community leaders and elected officials included real-time polling, allowing participants to share their opinions publicly but without requiring them to voice what might otherwise be a controversial or unpopular point of view. The software anonymized responses and presented results to all, allowing the transit agency and consultant to acknowledge that the most vocal participants' support for a transit tax measure was not necessarily embraced by all. Tools like Miro and Mural offer virtual participants in a meeting access to sticky notes and white boards to prioritize goals.

Considerations

Motivators
Ongoing information sharing, advisory discussions, rider education.

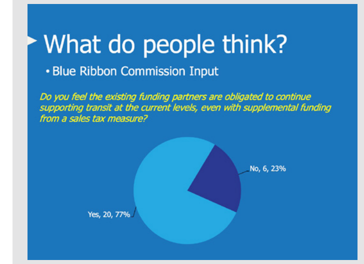
Audience
Size: Small. Typically, 10-30
Type: Appointees, advocates, technical specialists, staff

Complexity
Low level of complexity

Learn More

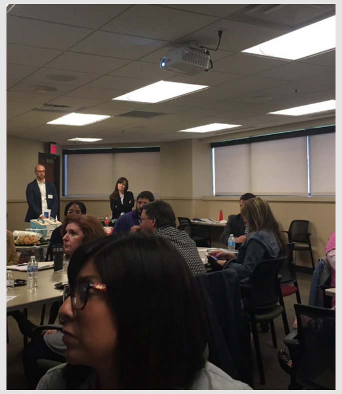
Page	Resources
92	Miro
92	Mural
88	Poll Everywhere
88	Mentimeter

Example
MOVE Central Arkansas: Strategic Transit Plan



A presentation slide shows the outcome from instant polling for the MOVE Central Arkansas Plan for Rock Region Metro.

Stakeholder Group Meetings



A stakeholder meeting can bring together partners and organizations with different backgrounds and interests.

Stakeholders are usually consulted when strategic planning or service changes are being developed. For example, when an MPO is launching a new regional transit plan, a suggested best practice is to convene stakeholders representing businesses, medical facilities, educational institutions, human service organizations, elected officials, etc. Transportation providers and transit agencies regularly conduct stakeholder meetings for a wide variety of reasons, but mostly to gather information about important issues or stakeholder concerns, or to collect feedback on interim plans or deliverables. Because many stakeholders have the ear of elected officials and other decision makers, convening meetings with stakeholders can be a useful approach to build consensus.

Considerations

Motivators
Service restructuring/ major system changes, studies (fare pricing, service design, coordinated plans), marketing campaign or rebranding

Audience
Size: Small. Typically, 2-20
Type: Business, education, human service, and advocacy representatives

Complexity
Moderate level of complexity

Board or Council Meetings

Board and council meetings are regularly scheduled policy meetings to discuss the business of managing, funding, and operating a transit agency or other transportation organization. These meetings usually comprise elected or apportioned officials and feature a series of speakers, as well as presentations and detailed reports. They also may include a public comment period during or following the session. Board or council meetings are typically recorded and may be shared via webcast or telecast.

Considerations

Motivators
Transportation program management, policymaking, customer engagement/system transparency.

Audience
Size: Typically, 5-15 on council and additional members of the public
Type: Representatives and interested members of the public

Complexity
Low level of complexity

Learn More

Page	Resources
45	Webcast/Telecast

VIRTUAL ENGAGEMENT: TOOLS & APPROACHES

Public Meetings and Public Hearings

Public meetings and hearings are usually scheduled around planning studies to solicit feedback on proposed designs or to gather information about needs or preferences from members of the public. Both in-person and virtual public meetings can take many formats, including a traditional one with a presentation followed by a question-and-answer period; an open house format for people to mingle and look at displays while they speak with staff or consultants; charrettes or planning games where people work together to propose solutions to various challenges; pop-up events where small drop-in sessions may be held at a street corner or transit center; etc. Public hearings are typically held as required by statute or other policy framework for members of the public to share a comment for the record by offering feedback on specific proposed legislative, environmental, funding, or planning actions. In a public hearing, responses to the comments or questions posed are typically not provided.

Considerations

Motivators
Community engagement for a service plan or fare study, statutory requirements

Audience
Size: 12-200
Type: General public and advocacy representatives

Complexity
High level of complexity

Focus Groups

Unlike standing meetings or even stakeholder group meetings, focus groups are topic-specific meetings held to gather feedback on a particular initiative, such as transit service marketing or branding, fares, or route changes. Most focus group meetings are held only once, and often participants are given an incentive — financial or other — to participate. In a focus group, a moderator asks a series of questions for participants to share their reactions and provide context for their opinions.

When is a Focus Group Right for You?

Transportation providers benefit from focus groups when they seek input from people outside of their usual markets or audiences, or need more in-depth information than they can typically get from a survey or public meeting. A focus group puts the transportation organization in control of the conversation, with a facilitator who guides the discussion and asks probing questions to understand motivations or concerns behind an individual's opinion. Focus groups and similar qualitative research can also be used to understand how an individual experiences a tool, technology, route, or interaction. When the public transit system on the Hawaiian island of Kaua'I undertook a transit study that assessed its marketing tools, the consulting team led focus groups with diverse audiences to understand how both current transit users and non-users perceived the informational materials, logo, and appearance of the buses.

Considerations

Motivators
Marketing campaign or rebranding; w products: fare media, specialized services, new facilities

Audience
Size: 8-15
Type: Consumers, targeted audiences

Complexity
Moderate level of complexity

Q&A Meetings and Press Conferences

Sometimes transportation organizations seek to engage members of the public or the press by making themselves available to answer questions. These meetings may or may not include a presentation, but the focus is on responding to inquiries. Some organizations include these meetings as part of an open house session or other event, while others host these as standalone proceedings. It is customary to have one person moderating the questions as they are asked and one or more individuals available to answer them.

Considerations

Motivators
Legislative initiatives/tax measures, Crisis management/unanticipated disruptions, Pandemic safety/health guidelines

Audience
Size: Any size
Type: Representatives and interested members of the public, advocacy organizations, press, staff

Complexity
Low level of complexity

Special Events

Special events can encompass any of the types of meetings that have already been described, but they are customarily held to promote or introduce a new service, new facility, or plan/recommendation. A ribbon cutting for a new transit center, for example, provides an opportunity for an organization to showcase its hard work; highlight the key stakeholders, staff, and officials that helped it achieve its goals; promote and market its service; and build community support. It also offers members of the public and stakeholders the opportunity to interact with staff and other like-minded individuals who share support for an investment or initiative. Special events give a transportation organization a way to return their appreciation for the community's efforts and support, and to build stakeholder relationships.

Special events are a tool for transportation organizations to rally supporters and stakeholders.

Considerations

Motivators
New products: fare media, specialized services, new facilities

Audience
Size: Any size
Type: All audiences

Complexity
High level of complexity

Learn More

Page	Resources
43	Virtual meeting
44	Webinar
52	Pre-recorded presentations

Trainings or Seminars

Many transportation organizations value the interactions with stakeholders in which they can educate them about their services, train representatives of partner organizations, offer travel training to potential riders, promote their ambassador volunteers, and support community mobility initiatives. Training is an important service for bus operators, accessibility specialists, and customer service representatives who work with members of the public on a daily basis. Interactive training can be done in person or via webinar, virtual meeting, or pre-recorded presentation.

Considerations

Motivators
Rider education, Policy and/or procedure updates

Audience
Size: Small. Typically, 2-30 at a time.
Type: Users, staff, partner organizations

Complexity
Moderate level of complexity

Trainings that require small discussion groups can be replicated in breakout rooms using virtual meeting software.

Retreats

Transportation organizations seeking to improve the effectiveness of their programs, educate board members, build stakeholder relationships, or engage in strategic planning may host occasional retreats. These are intensive sessions for identifying organizational limitations, goalsetting, staff needs, and capacity building.

Considerations

Motivators
Strategic planning, crisis management

Audience
Size: Small. Typically, 2-20
Type: Staff, representatives

Complexity
Moderate level of complexity

VIRTUAL ENGAGEMENT: TOOLS & APPROACHES

Virtual Meetings

This section provides an overview of virtual meeting designs. Different topics and the need for various types of input necessitate different meeting formats. Formats are discussed in the section below.

* Indicates that an upper range of a consideration was provided. Other, less resource heavy, options exists depending on the meeting size and design. See more details in the "Considerations" section of each virtual meeting type.

Virtual Meeting

A virtual meeting is any meeting that is conducted entirely online. During a virtual meeting, participants can interact with one another using a set of tools available through online meeting software. The purpose of a virtual meeting is to allow for presentations or discussions that include most of the participants.

An in-person meeting around a conference room table can often best be replicated through a virtual meeting. In a virtual meeting, the expectation is that there are many potential speakers and that it is valuable to have both verbal and visual interactions. Although virtual meetings can include potentially hundreds of participants, the optimal size for a virtual meeting is typically a group of between two and 30 participants.

Finding the Right Interface

With the public health directives associated with COVD-19, most transit organizations moved from in-person meetings to virtual meetings. Before settling on Zoom, Hopelink in Seattle, WA, formed a taskforce, tested various virtual meeting software, and selected Zoom because they found it easiest to use. Through the taskforce, they did research, created an external-facing Zoom guide, and developed internal best practices that highlight necessary Zoom settings for all meetings. When facilitating meetings, they appoint a technology staff-support to manage chat, security features, and admit attendees for large meetings. Whenever planning a large event or including new presenters or features, they schedule and conduct a meeting rehearsal beforehand.

Considerations

Audience Size
2-30

Tool Required
Virtual meeting software

Technology Needs
Internet access; smart phone or computer

Staffing
1-2: Facilitator(s) and meeting manager

Cost
Low

Best for
Stakeholder group meetings, standing meetings, focus groups, trainings, retreats

Quick View

What? Virtual meeting for a discussion or presentation.

Why? Encourage discussion among participants on one or more topics.

Who? Stakeholders expressing a variety of perspectives and opinions; any member of the group may have a speaking role.

Example
Hopelink

Learn More

Page	Resources
88	Surveys and polling tools
129	Hopelink

Virtual meeting software allows for live discussions among participants.

VIRTUAL ENGAGEMENT: TOOLS & APPROACHES

Webinar

Quick View

What? Webinar for a presentation with restricted opportunities for comments and questions.

Why? To present technical or educational information to a potentially large audience; affords audience participation controls to the webinar leader.

Who? Members of the public or invitees who seek to gain more information about a program or initiative and may offer questions of share limited feedback.

Learn More

Page	Resources
85	Webinar and virtual meeting tools
88	Surveys and polling tools

Unlike a virtual meeting, a webinar meeting format allows for a high number of participants to join as listeners or viewers with a set of tools to allow them to interact with the primary speakers,. Tools include the ability to ask questions via a chat feature, raise their hand to interact when called upon, etc.

The primary difference between a virtual meeting and a webinar tool is that in a webinar, a small group of people are assigned speaker roles while the vast majority of participants are audience members. Webinars are particularly effective when there is a presentation involved and audience members are not intended to have frequent interactions with the primary speakers.

Considerations

Audience Size
25-2,000

Tool Required
Webinar software

Technology Needs
Internet access; smart phone or computer

Staffing
2-3: Facilitator; meeting manager*

Cost
Low

Best for
Board or council meetings; public hearings

Webcast, Telecast, or Radio Broadcast

While a webinar allows the audience to raise hands or ask questions when appropriate, a webcast or telecast is a tool for streaming any type of meeting, including a webinar, to a larger audience. For a webcast, audience members typically visit a website URL and can observe and listen to the proceedings. Most webcasts do not have tools built-in where audience members can interact, with the exception of offering a response icon or emoji that provides simple feedback as the webcast moves forward.

Like a webcast, a telecast broadcasts the proceedings of a meeting via a television channel, which can reach a large audience, including individuals who may not have access to the Internet. Many telecasts are presented via a local cable access or government TV channel.

A radio broadcast, like a telecast or webcast, typically makes use of a local radio station to share the proceedings of the meeting live. Some radio broadcasts can also be shared as podcasts, downloadable or streaming from the Internet, allowing the audience to listen at their leisure without providing tools for instantaneous feedback. Importantly, webcasts, telecasts, and radio broadcasts, can be combiner and utilized simultaneously to maximize the channels through which the public can access the meeting.

Some webcast software may have tools built-in to allow for basic feedback. Transit agencies and others seeking feedback may encourage audiences to dial a telephone number to leave comments or speak with an individual at the meeting, write an email or a comment card comment, or respond via another tool such as a website or social media account.

Participating Remotely in an In-Person Event

In developing a new transit plan for the Bismarck-Mandan service area in North Dakota, the MPO scheduled a televised meeting to review the plan and take questions from the public. The meeting was broadcast live via the local government access television station. Although only a handful of participants joined the meeting, individuals

Quick View

What? Webcast, telecast, or radio broadcast to share the proceedings of a virtual, hybrid, or in-person meeting with a larger audience.

Why? To offer greater participation opportunities than can be accommodated in person on via virtual meeting tool; afford access to low-tech tools for input or questions during a remote meeting.

Who? These relay tools are valuable to people who may not have access to virtual meeting software, are unable to attend a meeting in person, have limited internet access (but access to traditional media like radio and television), or may benefit from an in-language (or interpreted) meeting stream.

Example

Bismarck Mandan Mobility 2017 Plan

CAT bus in downtown Bismarck, ND

VIRTUAL ENGAGEMENT: TOOLS & APPROACHES

were given the option of calling in with their questions or reactions, or could email questions or comment during the live meeting. The facilitator monitored the questions, read them aloud, and provided verbal responses via the telecast.

Considerations

Audience Size
Unlimited

Tool Required
Streaming service; radio or television broadcast equipment/ service

Technology Needs
Internet access, television, radio

Staffing
2-3: Facilitator; meeting manager; broadcast specialist

Cost
Moderate

Best for
Board or council meetings; public hearings

Teleconference

A teleconference can offer all the features of a virtual meeting or webinar without the visual elements that typically accompany them. Before virtual meeting software made it easy for people to interact with each other online, teleconference tools were widely available to bring multiple parties into a meeting via telephone. Today, some webinar software allows for teleconference-only features where participants dial into a specified telephone number and enter an access code to join the teleconference. Many business phone systems also allow for teleconferencing.

Creating a Telephone Town Hall

Some transportation organizations have taken teleconferencing to the next step using moderated telephone town halls that allow potentially thousands of people to join a live discussion. While a telephone town hall can offer people a dial-in number to participate on a specific date and at a prescheduled time, some specialized telephone town hall software can be used to make automated telephone calls to prospective participants. Via a recorded message, individuals are notified that a telephone town hall is being scheduled and that they will be called back at the time of the meeting. The automated telephone system then dials the prospective participants at the appointed time and connects them to the telephone meeting. Use of this tool means that little initiative is required on the part of individuals who might be interested.

Over 3,000 participants joined a telephone town hall meeting in 2020 in California that covered the State's High Speed Rail program between Burbank and Los Angeles. The high number of participants did not necessarily translate to active participation: the average participant joined for less than five minutes before disconnecting. Only 49 participants dialed in to the meeting (rather than being connected via an outgoing telephone call). Teleconferences can also be paired with webcasts, telecasts, and radio broadcasts as a fourth mass-media platform.

Quick View

What? A teleconference meeting, or virtual telephone-based meeting without video.

Why? Allows people with access to a telephone to participate; reduces virtual meeting fatigue; provides a high level of accessibility when paired with translations for non-English speakers or TTY service (for people who are deaf or hard of hearing).

Who? Smaller groups of individuals but can also reach large groups of people for whom internet-based meetings are not an option.

Example
California High-Speed Rail

Learn More

Page	Resources
85	Webinar and virtual meeting tools

Considerations

Audience Size
2-500

Tool Required
Teleconference phone system or virtual meeting software

Technology Needs
Telephone

Staffing
1-3: Facilitator; meeting manager; technical manager

Cost
Low

Best for
Small informal meetings, Stakeholder group meetings, standing meetings, public town halls

Virtual Conference

Virtual conferences allow individuals who are widely scattered to participate in a conference-like set of meetings without going to a convention center. Most virtual conferences are an amalgamation of the various tools and technologies described above. While virtual conferences can be held at a large scale, allowing hundreds or thousands to participate via webinars, virtual meetings, webcasts or telecasts, or pre-recorded presentations or posters, they can also be conducted at a smaller scale.

Hosting Conferences without Conference Centers

The 2021 Transportation Research Board Annual Meeting registered more than 19,000 participants for a virtual event. Due to the COVID-19 pandemic, instead of having participants convening at the convention center in Washington, DC, attendees participated in a mix of webinars, chat-enabled virtual poster events, virtual committee meetings, and social chatrooms. The annual meeting provides an example on a large scale of how a variety of tools and technology platforms can be integrated to create a virtual conference-style event.

Considerations

Audience Size
Unlimited

Tool Required
Virtual meeting software, webinar software, document sharing, website

Technology Needs
Internet access; smart phone or computer

Staffing
Low to high based on meeting size and activities

Cost
High

Best for
Large meetings of stakeholders and partners; special events; trainings and seminars

Quick View

What? A virtual event encompassing one or more remote engagement tools for different types of interaction.

Why? In the absence of an in-person meeting or to expand participation options for a hybrid event, a virtual conference allows for people in a large geographic area or for whom travel costs would be prohibitive to join seminar or conference.

Who? Potentially large numbers of individuals participating in trainings, meetings, and presentations.

Example
Transportation Research Board

Learn More

Page	Resources
85	Webinar and virtual meeting tools
92	Data collaboration tools

Hybrid Meetings and Events

Quick View

What? A meeting with both an in-person and a remote component.

Why? Allows for greater participation than an in-person meeting alone; affords people with travel challenges, mobility impairments, and who reside far from the in-person meeting to join.

Who? Participants joining from home, remote workplaces, or in person.

Learn More

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85	Webinar and virtual meeting tools
92	Data collaboration tools

Example

Valley Transportation Authority

When some participants can travel to a meeting location, but others cannot, offering hybrid meetings has helped bring all parties together. For example, people who live within a certain radius of the meeting location may opt to participate in person, and others, who may live further away, or are unable to travel for any reason (cost, health, job, or family responsibilities) may be unable to participate in person. Offering a hybrid meeting is an approach to accommodate these divergent needs. Hybrid meeting or event formats also can reduce costs for certain experts or technical specialists to participate in a meeting session (they can join remotely and do not necessarily need to participate in the full meeting).

Although the idea of a hybrid meeting seems simple and intuitive, the execution of a hybrid meeting can be challenging as organizers, who often are at the in-person event, seek to accommodate the needs of in-person and remote audiences. For example, while sound quality in a conference room may be optimal for those who are at the in-person meeting, it may be poor for online participants. Likewise, a meeting facility may not have good telephone or webinar connectivity. As a result, hybrid meetings require careful prior planning and are often more resource intensive than entirely in-person or virtual meeting because of the additional hardware and staffing required to link in-person and online audio or video. Best practices for hybrid meetings typically include the use of virtual meeting tools with a virtual meeting manager responsible for monitoring the virtual elements of the meeting. One challenge that facilitators of hybrid meetings often face is equitably addressing the different levels of participation among those who join the meeting in person versus those who join remotely.

Are Hybrid Meetings and Events the Future of Engagement?

Many of the agencies and organizations that provided input for this guidebook suggested that in the post-COVID-19 era, they intend to pursue hybrid meetings as a tool to offer greater flexibility for potential participants. Many recognized that their participants experience on-line meeting fatigue and would prefer to meet in person when the option is available, but that some groups such as caretakers, people who reside outside of a core service area, some people with disabilities, and others may find it easier to participate virtually when the option is available to them.

Staff at VTA in Santa Clara County, CA, found that in addition to their in-person meetings, they could host virtual public meetings for planning projects midday and in the afternoon, when people might otherwise not be available for an in-person meeting. By offering this option, they were able to attract a diverse set of participants overall. VTA also sought to shorten their large-scale planning meetings, hosting meetings that people could join in person or virtually.

Considerations

Audience Size
25-2,000

Tool Required
Virtual meeting or webinar software; quality microphone and webcam

Technology Needs
Internet access; smart phone or computer

Staffing
3-4: Facilitator, In-person technical staff; online meeting manager*

Cost
Moderate

Best for
Any type of meeting can be a hybrid meeting

Pre-Recorded Presentations

Quick View

What? A recorded meeting or presentation that can be reviewed at any time, typically with supplemental feedback tools.

Why? Allows individuals to participate without being constrained by a specific time.

Who? This meeting type can be useful for all audiences; it can often allow users to view the event using closed captions (including in other languages), review transcripts, or listen an event recording at a preferred speed or volume.

Learn More

Page	Resources
86	Live streaming and video
132	Yolobus case study

Live events are optimal for engaging stakeholders or members of the public in two-way dialogs with MPO, transit agency, or transportation staff. In some cases, however, live meetings and events may not be easy to execute or may not meet the needs of an audience's schedule. Many transit agencies have developed a series of videos or other pre-recorded presentations that allow the agency to inform the audiences about new initiatives, plans or services and that can be viewed at one's leisure. Audiences can provide feedback via polls, online surveys, or other engagement tools such as chat or message boards.

In Practice

Yolobus

When a rural California transit operator in Yolo County (Yolobus) planned a virtual meeting as part of a transit study, they developed a pre-recorded virtual public workshop that the public could view at their leisure. They also developed a survey questionnaire that allowed people who watched the virtual workshop video to provide their responses, reactions, and feedback on the ideas presented in the workshop. Effectively, this served as a relatively low-cost, at-your-own-pace virtual workshop that provided the tools to review the information available and provide input, but not with live interaction.

Learn more about Yolobus on page 132.

Considerations

Audience Size
Unlimited

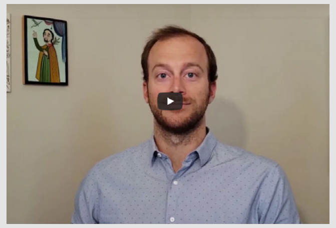
Tool Required
Virtual meeting software with a recording feature, audio or video recording and playback software

Technology Needs
Internet

Staffing
None (staff is needed to prepare and upload the recording, but live staff is not required)

Cost
Low

Best for
Special events, trainings, Q&A meetings (with other feedback tools)



A transportation organization's pre-recorded presentations can allow people to watch at their own pace and often affords users accessible features like closed captions, playback speed selection, and volume control.

Online Chat or Message Board

Quick View

What? Online chat or message board for written dialog.

Why? Allows individuals to participate without speaking; offers multilingual discussion options; a virtual message board allows others to see typical comments and discussion topics.

Who? Chat boxes and message boards can allow specific individuals or the public to participate in dialogs.

Webinars and virtual meetings often include chat boxes so audience members or participants can type their feedback to share instantly with meeting facilitators or speakers. Online chat or a message board can also function as a standalone meeting tool or can be used in combination with pre-recorded presentations to allow for feedback. Some transit agencies have effectively used online chat features to accompany graphic images on their websites or in virtual open houses so audiences can share their comments and, in some cases get immediate feedback. Online chat features usually are limited to a discussion between one audience participant and one presenter, all of which is conducted by typing into the chat box. An online message board allows participants to see each other's comments and responses to comments, much like a public Facebook post where individuals can respond to and/or react to other audience member comments.

Example
City of Austin

Austin's Strategic Mobility Plan included a website, multiple engagement efforts, and a Reddit AMA.

Integrating Written Responses into a Live Forum

The City of Austin, Texas, conducted a Strategic Mobility Plan in July 2019 and hosted an event on Reddit, using the Reddit AMA ("Ask Me Anything") feature. The format allowed members of the public to type questions about the program and service recommendations, and for a group of City and transit staff to offer live written responses. Over a two-hour session, the City received more questions than they could reasonably respond to, but they found the feedback to be helpful for further analysis. A tool like Reddit AMA charges no fees for hosts to publicize and respond to questions, and allows for online curation of questions: the responding staff can opt not to reply to obscene or out-of-context questions and other meeting participants can vote up or down questions or comments that are important to them. The result is a virtual question-and-answer session in text.

Considerations

Audience Size
Unlimited

Tool Required
Interactive live chat software or message board

Technology Needs
Internet access; smart phone or computer

Staffing
1-2 minimum moderators to respond to inquiries: more for large-scale effort

Cost
Low

Best for
Feedback on pre-recording meetings; Q&A meetings; public meetings

Learn More

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85	Webinar and virtual meeting tools
92	Data collaboration tools
93	Community outreach and planning tools

VIRTUAL ENGAGEMENT: TOOLS & APPROACHES

Online Collaboration

Quick View

What? Online collaboration tools used in lieu of or to supplement any other type of meeting.

Why? Allows individuals to participate without speaking; may allow for participation at one's own leisure or in a timed collaboration sessions; can result in helpful exhibits, outlines, and other tools for planning.

Who? Available to anyone who can access the online collaboration tools.

Learn More

Page	Resources
92	Data collaboration tools
93	Community outreach and planning tools
137	TCAT case study

Online collaboration tools are standalone or meeting-integrated tools that can spur collaboration without relying on an active video or audio connection. Examples of online collaboration include using a route map that individuals can mark up with their comments and concerns, or participating in online exercises that allow audience members to assess trade-offs of one service option versus another. Online collaboration tools are different from chat or message boards because the focus is on structured decisions or input around a particular question or topic.

In Practice

Tompkins Consolidated Transit Agency (TCAT)

To inform their 2020 Transit Development Plan, the Tompkins Consolidated Transit Agency (TCAT) hosted a virtual Open House, in which they launched three 'Service Network Design Exercises' including interactive mapping, an idea wall, and participatory budgeting. This publicly available online portal, which was opened through the month of October, allowed users to provide feedback at their convenience instead of requiring the hour-long time commitment often associated with in-person events. TCAT staff found this approach to be a more successful engagement effort than their virtual focus groups and office hours, which were both poorly attended relative to their in-person counterparts.

Learn more about TCAT on page 137.

Considerations

Audience Size
5-150

Tool Required
Online collaboration tools

Technology Needs
Internet access; smart phone or computer

Staffing
1-5 including facilitators, technical staff; support staff

Cost
Moderate

Best for
Stakeholder group meetings, standing meetings, focus groups, trainings, retreats

An in-person collaborative mapping exercise. Online tools can be used to replicate this effort.

Photo credit: Unkown

VIRTUAL ENGAGEMENT: TOOLS & APPROACHES

Effective Virtual Meetings

Learn More

Page	Resources
42	Types of virtual meetings

A transportation organization can lead or sponsor any number of virtual meetings or engagement events, but without a solid understanding of the virtual engagement meeting tools and their capabilities, successful virtual meetings can be elusive. This section outlines best practices for virtual meeting planning and execution, as well as the various ways meeting hosts can engage participants and solicit feedback during a virtual meeting. The types of meetings that will be planned and carried forward will impact which practices are most useful to incorporate into an engagement process.

Conducting Equitable and Accessible Virtual Engagement

A community resource assessment can include a tour of local facilities.

Assess Community Resources and Stakeholder Capacity

Providing equal access for all participants is a fundamental element of public engagement and involvement. Not all communities will have the same level of access to technologies and tools used during virtual engagement events, and not all stakeholders will have experience with the available technologies. Transit agency representatives indicated they are most successful when they are mindful of the approaches and technologies they choose to employ. For example, in a community where residents have little access to personal computers or the internet, options such pre-recorded presentation, teleconference, or hybrid meeting for a scheduled meeting can be valuable. When a significant proportion of a community's population speaks a language other than English, translation and interpretation are important components of the meeting design (Environmental Protection Agency, 2020).

Use Multiple Methods to Distribute Invitations

Relying on a single approach to reach stakeholders in a community to share information about opportunities to participate in meetings or events may leave some stakeholder groups out. While digital invitations might be sufficient in reaching certain community members, they often exclude those who do not have access to a personal computer or the internet. To ensure that hard-to-reach populations are incorporated into outreach and invitation efforts, successful virtual engagement efforts typically include physical outreach, such as flyers, pamphlets, or postcard mailers. Some transit agencies have found that many of their consumers lack internet service at home but have a mobile phone, and often a smartphone. Text messaging and the use of QR codes for sharing information on buses and signage were helpful in getting the word out. Various programs exist for people to opt in to receive text messages for engagement information.

> **In Practice**
>
> **The Center for Pan Asian Community Services**
>
> The Center for Pan Asian Community Services (CPACS) in Georgia, primarily serves immigrant, refugee, and low-income families, providing transit, education, advocacy, and legal services, among others. As the organization serves multiple immigrant communities, with members with varying levels of English proficiency, they provide language services during their outreach and engagement to connect with as many community members as possible. This can include having an interpreter join a call with a representative from the organization or preparing informational materials in multiple languages.
>
> Learn more about CPACS on page 131.

Ensure Accessibility Compliance

Many transportation organizations, and certainly most transit providers, follow the requirements of Title VI of the Civil Rights Act of 1965 and Americans with Disability

! Pick up the phone

It's no secret that switching to virtual outreach approaches can feel a lot less personal. Even offline materials distribution, such as flyers and postcards, are provided at a distance, and miss the human connection thatis expected in the engagement process. When developing engagement plans, agencies should strongly consider calling stakeholders where possible, taking into account that some stakeholders may not have access to or be comfortable using smart devices. The effort can provide a more human quality to the virtual outreach process. For instance, TCAT found that there was higher stakeholder interest and responses when they contacted community members by phone rather than email. A phone call can serve as a simple reminder that there are interested people on the other side.

Learn More

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131	CPACS case study

Learn More

Page	Resources
19	Title VI
95	508 Compliance
151	Facilitation Plan

The meeting facilitator should remain visible and keep the meeting moving on schedule.

Photo credit: Anna Shvets from Pexels

Act (ADA), and often other outreach requirements in their adopted Public Outreach plans. Requirements, typically defined under the ADA and Section 508 of the Rehabilitation Act may include closed captioning on recorded videos, screen reading compatibility for shared or uploaded documents, translations of information in the languages that are predominant in the area, and options for information in Braille or other formats. This guidance helps to ensure events are accessible to participants.

Facilitation Techniques for Virtual Engagement

Define Meeting Objectives and Desired Outcomes

Defining a meeting's objectives and desired outcomes is the recommended first step in conducting a virtual meeting or event. This will help ensure there is a clear understanding of goals and the purpose for the engagement effort, and also guide efforts to advance key objectives. Clearly defining objectives will help keep them at the center of planning activities as work proceeds.

Design the Meeting Format with Meeting Objectives in Mind

Based on the objectives of the event, meeting organizers should select a meeting format or virtual platform that will maximize participant engagement and achieve the meeting objectives. For example, an agency seeking to facilitate collaborative dialogue and problem-solving among participants might consider incorporating video webcams and annotation into an event.

Create a Facilitation Plan

A facilitation plan provides a comprehensive and detailed description of the different sessions or components of an event. A facilitation plan helps an agency coordinate roles and responsibilities, anticipate challenges, and prepare for contingencies. A facilitation plan establishes the flow of the event and documents the approach for facilitating participation from all stakeholders. The plan ideally considers the different ways stakeholders participate and offers approaches for making these interactions successful. Meeting hosts typically develop and review the facilitation plan with key participants to confirm roles and responsibility expectations during the engagement (Environmental Protection Agency, 2020).

Key elements of a facilitation plan are as follows:

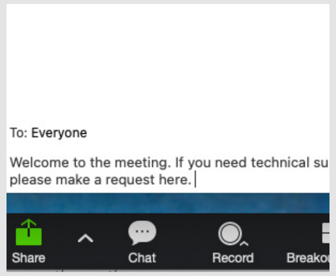
- Relevant details about the meeting (location, date & time, webinar and conference details)
- An overview of the timing, presentations, and purpose of each agenda session
- Team roles and responsibilities
- Key participants, transitions between speakers
- Brief talking points or framing about the topics that will be discussed

Define and Confirm Project Roles

When preparing for a virtual engagement event, it is recommended that a facilitation team is assembled to fulfill the virtual meeting needs and help facilitate the discussion to achieve the desired outcomes. A project team for a virtual meeting might include the following roles:

- **Team Lead:** A team leader will coordinate team members, allocate tasks, and ensure overall quality control. They should provide team support and encouragement and keep everyone focused on the vision and objectives of the engagement.
- **Facilitator:** The facilitator runs the meeting and seeks to ensure equitable participation and discussion management while helping the group understand and accomplish common objectives. Additionally, a facilitator helps participants work through tricky areas and advance the group's discussion and actions based on the meeting objectives.
- **Technology Facilitator:** A technology facilitator is

VIRTUAL ENGAGEMENT: TOOLS & APPROACHES



Using chat and other features, a technology facilitator can address participants' technical issues for a meeting in progress.

responsible for running the technology behind any engagement. They manage the meeting technologies while addressing unplanned technical issues. This role might be responsible for activities such as incorporating technical facilitation notes within the meeting facilitation plan, setting up the webinar room, loading approved polling questions, advancing presentation slides or webinar layouts, and ensuring that participants are accessing the virtual event. During the virtual event, the technology facilitator also serves as the point of contact for technical issues and seeks to improve the digital user experience for all meeting attendees. Typically, a technology facilitator will help participants resolve issues such as joining the webinar, establishing audio connections, and viewing the meeting materials or presentations. This technical support role is not a substitute for the facilitator, because they may need to step away from the meeting proceedings to provide support without disrupting the flow of the engagement.

- **General Support:** A general support role can be helpful with tasks such as notetaking, record keeping, post-meeting follow-up, and materials development.

Recognizing that resources and staffing capacity can be constrained, multiple roles can be fulfilled by one individual when necessary, especially for smaller meetings or events. For example, the team lead and facilitator roles can be assumed by one person (Environmental Protection Agency, 2020).

Create and Enforce Participation Guidelines

At the start of the meeting, it is important to establish shared understanding between meeting hosts and participants about how access support and to interact with each other. Participation approaches and guidelines may differ depending on certain considerations, such as the type of meeting, number of participants, and familiarity among participants. Once meeting guidelines have been confirmed by attendees, the facilitator's enforcement of the guidelines is usually welcomed by most participants: meeting participants like to know they are equally valued (Harty & Gershowitz, 2020).

Example participation guidelines for virtual meetings might include:

1. Everyone participates; engage actively and share openly.
2. Create a safe space; respect others' views and contributions.
3. "Honor" the agenda.
4. Limit background noise – mute your phone or microphone when not actively participating.

Meeting Execution Tips

Join the Meeting Early

Meeting hosts should join the meeting or event as much as one hour in advance of the meeting start time to give themselves sufficient time to run through their pre-meeting check list, make any final adjustments, and address unexpected challenges. Joining the meeting early will ensure that hosts are not making last-minute adjustments as participants dial-in, log-on, and get settled (Harty & Gershowitz, 2020).

Explore Webinar Security Settings

Depending on the type of virtual meeting, it might be necessary to enable additional security settings within the webinar platform to keep the meeting secure and avoid meeting disruption. Creating a meeting waiting room is an effective way to screen participants that are entering the meeting. By enabling a waiting room, participants are not able to join until the host admits them into the meeting.

Meeting settings can also be adjusted to only allow the meeting hosts to share their screen. This ensures that participants are not able to take over the screen share during a meeting. Other security measures include

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VIRTUAL ENGAGEMENT: TOOLS & APPROACHES

locking the meeting room once it starts to prevent additional participants from entering and creating an invite-only meeting to restrict who can join. In the event that an unruly participant joins the meeting, facilitator guidelines typically suggest the facilitator may remove that participant to lock them out of the meeting and avoid further disruption.

Use Instant Messaging to Coordinate with Other Meeting Hosts

Prior to the meeting, it is recommended that the meeting hosts and organizers establish a separate channel of communication to utilize throughout the meeting. This channel of communication can be useful for coordinating "behind the scenes" items, such as presentation timing, incoming questions, and technical difficulties. Depending on the preferences of the organizing team, meeting hosts can consider using an in-meeting host-only chat (if the meeting platform includes one) or an external live chat platform, such as WhatsApp or Slack.

An external chat platform for presenters only allows meeting hosts to communicate with one another.

Make Meeting Materials Available to the Public

Whether it is a recording of the webinar with closed captioning or a detailed meeting summary of the event, the host organization should be prepared to make the presentation and meeting materials available to the community in an accessible format following the meeting. This will ensure that individuals who were not able to attend the meeting or event in real-time have an opportunity to stay informed and will allow participants to see that their contributions were recognized and recorded (Harty & Gershowitz, 2020).

Offer Responsive Technical Support to Participants

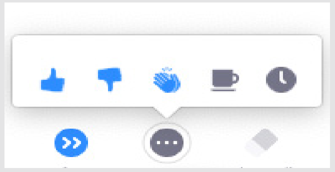
Participants sometimes encounter technology issues when attempting to join a virtual event. These issues range from an inability to access the event to encountering audio connection issues during the event. To reduce the technical burden on participants and ensure a pleasant digital user experience, one-on-one technical support for participants is a preferred practice among virtual meeting hosts.

How to Solicit Feedback

Hosts can engage participants and solicit feedback during a virtual meeting in a variety of ways. Effective meetings and events include opportunities for participant feedback to help identify areas for improvement, to gain different perspectives, and to gauge participant interest in topics of interest or concern.

Reactions

Some virtual meeting and webinar platforms will enable participants to use emoticons or reactions during the meeting. These emoticons can be helpful to the meeting facilitator or host because they allow participants to share a nonverbal indication of their attitudes or preferences. For example, a facilitator may ask participants to vote to gauge whether they would like to spend more time on a certain agenda topic, by clicking the "Yes" or "No" emoticon.



Different platforms offer different tools for user reactions.

Polling

Polling can be used to assess a participant's affiliation, interests, experience, feedback, and more. Polling is a helpful tool to employ at any point in the engagement process. For example, conducting polling ahead of a virtual meeting might help to inform the meeting design and participant attitude. Or one might conduct polling during a meeting to collect public comment or drive stakeholder visioning. Distributing a poll following the meeting could be helpful to collect participant feedback, areas for improvement, or outstanding comments that were not mentioned during the meeting. Survey and polling tools can also be implemented for asynchronous engagement to collect public comments or feedback over an extended period. Most virtual meeting or webinar platforms offer in-meeting polling options, but external polling platforms, such as Poll Everywhere or Mentimeter, can also be

Learn More

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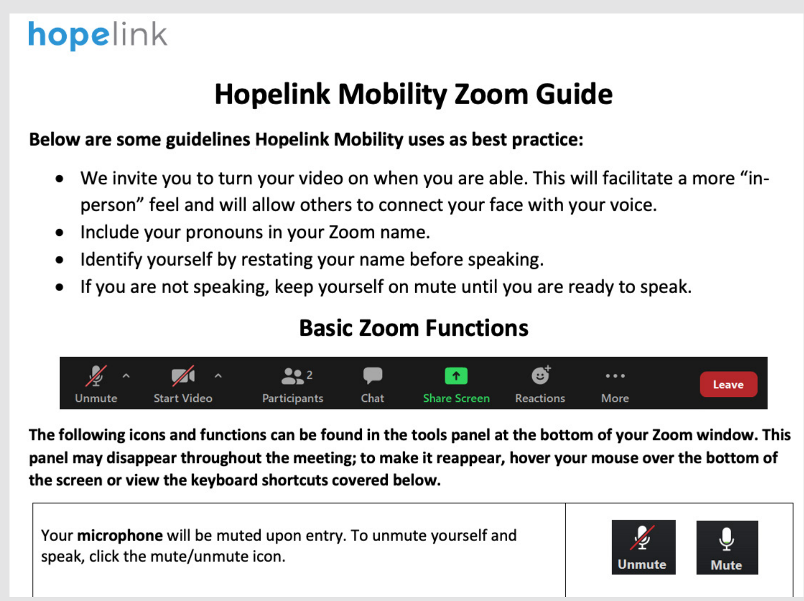
129	Hopelink's Zoom guidance

employed to poll and display live results during a meeting.

Discussion Queue

Employing discussion queues during a virtual meeting assists facilitators to manage conversations. A facilitator can suggest that meeting participants join a discussion queue when seeking to add comments, or during a question-and-answer period, so questions can be answered in the order they are received. For this to work effectively, a facilitator usually offers direction on how to join the discussion queue at the start of the meeting. In a virtual meeting, discussion queues often use the "raise-hand" feature, which assigns participants in a queue in the order in which hands are raised.


hopelink

Hopelink Mobility Zoom Guide

Below are some guidelines Hopelink Mobility uses as best practice:

- We invite you to turn your video on when you are able. This will facilitate a more "in-person" feel and will allow others to connect your face with your voice.
- Include your pronouns in your Zoom name.
- Identify yourself by restating your name before speaking.
- If you are not speaking, keep yourself on mute until you are ready to speak.

Basic Zoom Functions

Unmute | Start Video | Participants | Chat | Share Screen | Reactions | More | Leave

The following icons and functions can be found in the tools panel at the bottom of your Zoom window. This panel may disappear throughout the meeting; to make it reappear, hover your mouse over the bottom of the screen or view the keyboard shortcuts covered below.

Your **microphone** will be muted upon entry. To unmute yourself and speak, click the mute/unmute icon.	Unmute Mute

Hopelink, in Seattle, developed a guide for webinar management.

Webcams

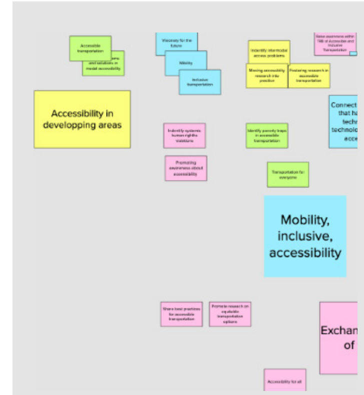
Webcams can be useful for groups convening for the first time, or for collaborative discussions where body language can add significant value to the interaction. A strong internet connection is essential when using webcams; a faulty internet connection can make glitching webcams distracting during a virtual meeting. Webcams may also undermine participants' focus from some meeting activities, such as revising a presentation with a group.

Chat Pod

A chat pod is typically a built-in tool that allows participants to submit questions and comments during a meeting. Often, the chat pod settings can be adjusted to allow group chats, one-to-one chats, or host-only chats. For a group chat, all questions and comments typed into the chat box can be viewed by everyone in the meeting room. One-to-one chats allow a host to initiate a discussion with an individual participant. A host-only chat box indicates that questions and comments typed into the box are only viewable by meeting hosts.

Consensus Building & Ideation

Some virtual meetings require back-and-forth participation between the meeting facilitators and participants. Annotation tools are one approach for collaborative discussions and are often incorporated and offered within a virtual meeting or webinar platform. Annotation tools enable facilitators and participants to collaboratively edit documents, images, maps or other content. Annotations can also be applied via virtual whiteboarding tools. Virtual whiteboarding enables the meeting host to share a blank screen or whiteboard on which participants may write, use sticky notes, create drawings, or add images. Virtual whiteboarding is designed to replicate an in-person brainstorming session. Often, annotated documents and virtual whiteboards can be exported from the meeting platform at the end of the meeting for reference and record keeping.

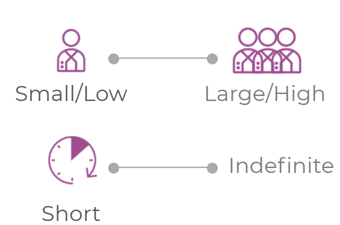


A virtual "sticky note" exercise conducted using Mural software.

Other Forms of Engagement

If public meetings are not the most suitable approach to public engagement for a project, there are several other strategies that can be considered, including using social media, websites, and surveys. The following pages detail different public engagement approaches, including their opportunities, limitations, and tools.

	Digital Fact Sheets	Digital Newsletters	Project Website	Podcast	Videos	Meeting-in-a-Box	Form-based Tools	Kiosks	Social Media
Objective	Inform	Inform	Inform, Engage	Inform	Inform	Inform, Engage	Inform, Engage	Inform, Engage	Inform, Engage, Persuade
Resources									
Staff Commitment									
Time Range		Indefinite	Indefinite	Indefinite				Indefinite	Indefinite
Cost									



Digital Fact Sheets

Fact sheets are used to share information about a project with members of the public and are usually distributed at the beginning of the project and updated as needed. Unlike lengthy and cumbersome project reports, a fact sheet provides concise, accessible, and relevant information, breaking down complex processes and ideas into smaller, more digestible, and salient pieces for members of the public to understand. It is important to ensure that digital fact sheets are 508-compliant. See the section on Accessibility and 508 Compliance for additional information and resources on making documents 508-compliant.

Considerations

Cost
Low. If the editing software has already been acquired, there is little to no cost when creating digital materials.

Time Range
Short. Time is only required to prepare and format content.

Staff Commitment
Low. Staff will be required to draft, review, and distribute the fact sheet. However, once the fact sheet has been distributed, there is no further staff time required.

Accessibility
- **Distribution.** Limited to stakeholders with access to and knowledge of the internet and a computer. To improve access, place printed copies in frequented public places such as libraries, grocery stories, schools, and community centers, among others.
- **508 Compliance.** Create 508-compliant versions to increase accessibility for stakeholders with varying levels of visual impairments.
- **Language Services.** Translate materials in different languages based on the community's needs.

Quick View

What? Fact sheets are one- to two-page documents that provide high-level and concise information on a topic.

Why? To provide a basic overview of a topic and to highlight key takeaways.

Who? The audience includes members of the public with access to and knowledge of the internet.

Learn More

Page	Resources
95	508 Compliance
110	Fact sheet how-to guide

Quick View

What? A newsletter is a document which routinely provides project updates.

Why? To provide project highlights for a standard period.

Who? The audience includes members of the public with access to and knowledge of email and who have been previously engaged (have already signed-up for more information).

Learn More

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89	Email marketing tools
112	Digital newsletter how-to guide

Digital Newsletter

Agencies that value periodically engaging with their stakeholders may use an online newsletter as means of doing so. Unlike fact sheets, which usually provide a high-level project overview, newsletters often share slightly more detailed information on project activities over a standard period— typically monthly, quarterly, or monthly.

Considerations

Cost

Low. The monthly or annual cost associated with the subscription to a marketing service can vary, but most plans are inexpensive.

Time Range

Indefinite. The time period can be informed by the length of a specific project or may continue as a part of ongoing engagement effort.

Staff Commitment

Low. Staff will be required to draft, review, and distribute the newsletter. However, once the newsletter has been approved, there is no further staff time required.

Accessibility

- **Distribution.** An online newsletter is limited by access to, and knowledge of, the internet and a computer. To ensure wide access, consider placing printed copies in frequented public places such as libraries, grocery stories, schools, and community centers, among others.
- **508 Compliance.** Create 508-compliant versions of newsletters. This will help increase accessibility for stakeholders with varying levels of visual impairments.
- **Language Services.** Provide translated materials in different languages based on the community's needs.

Podcasts

Podcasts are audio recordings which can creatively and effectively share information, provide perspectives on, and engage in a dialogue about a topic. Agencies can consider using podcasts as a tool for of providing project updates, background information, and historical context. They can also be used as a means of receiving community perspectives on and responding to community questions about projects and plans. In this way, podcasts can help reduce the distance between agencies and communities. Podcasts also provide a useful and informative alternative for engaging people with visual impairments.

Using Podcasts to Provide Context

In the summer of 2018, the Metropolitan Transit Authority of Harris County (METRO) released the first episode of its podcast, "The Next Stop" on major streaming networks. In this bi-monthly podcast, METRO provides riders with a "behind the scenes" look at the agency's people and programs and engages with transit users to learn more about their stories and experiences. Episodes vary in length, but are seldom longer than 20 minutes, and cover topics such as free WIFI on transit, event planning, transit user guides, and transit equity.

Considerations

Cost

Moderate. The cost will depend on the hardware, editing software and streaming services on which it is hosted. Relatively inexpensive kits are available and streaming services tend to charge based on the length of each episode. While most modern computers come with free audio editing software, agencies can also consider paying for subscription software that provides additional features.

Quick View

What? A podcast is an audio recording that provides information and discourse on a particular topic.

Why? To provide a resource in which topics and issues can be explored at length.

Who? The audience includes members of the public of all-ages, though may more readily reach young to working age populations depending on the platform.

Example

Metropolitan Transit Authority of Harris County

Learn More

To learn more about The Next Stop, go to https://www.ridemetro.org/Pages/Podcast.aspx .

Page	Resources
114	Podcasts how-to guide

Time Range

Indefinite. The time period can be informed by the length of a specific project or may continue as a part of ongoing engagement effort.

Staff Commitment

High. Staff will be required to create, record, and share content in a timely manner.

Accessibility

- **Distribution.** A podcast will be accessed online via an application on an electronic device. Stakeholders without knowledge of the internet and a computer may have challenges accessing content. To ensure wide access, consider partnering with local radio stations to play podcast episodes on air or making printed transcripts of episodes publicly available. Posting transcripts online will also ensure that community members with hearing impairments have access to this information.
- **Language Services.** Record and/or transcribe episodes in multiple languages.

Videos

Like podcasts, project videos enable agencies to share information about a topic. This approach can be more accessible and appealing than traditional distribution by sharing information in a stimulating and attention-grabbing way. Unlike podcasts, project videos tend to be produced infrequently and are usually made in conjunction with a project milestone. These videos can be uploaded to social media platforms and/or posted directly to the project website.

Moving In-Person Interaction to Video

Some transportation providers turn to video as a substitute for in-person meetings or trainings. With COVID-19, Hopelink in Seattle, WA, discontinued operating bus field trips for the Seattle Department of Transportation which offered experiential travel training. In place of the trips, they created a series of film tutorials showing people how to stay safe and ride the bus, and used these in virtual training programs. Likewise, for a transit plan, instead of conducting webinars or live virtual meetings, Yolobus in Yolo County, CA opted to conduct a pre-recorded video virtual workshop to update the public about the operations analysis and to give an overview of recommendations. Through the workshop, technical staff made presentations and encouraged participants to provide feedback using an online form.

Considerations

Cost

Moderate. The cost will depend on the hardware and editing software. Most computers have free video editing software, but agencies can also purchase software for advanced editing.

Time Range

Short. Videos tend to align with project milestones: only a single video needs to be made at a time.

Staff Commitment

Moderate. Staff time will be required to create, record, and share content.

Accessibility

- **Distribution.** A video can be accessed online via an application on an electronic device. To ensure wider access, consider preparing printed transcripts of the content Providing closed captions and posting transcripts online improvbes accessibility
- **Language Services.** Provide subtitles in multiple languages.

Quick View

What? A video is an audiovisual recording that provides information about a topic.

Why? To provide information on a project milestone.

Who? The audience includes members of the public of all-ages.

Examples
Hopelink and Yolobus

Learn More

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86	Livestreaming and video tools
116	Video how-to guide

Project Website

Quick View

What? A project website is an online repository of project-specific information and a platform for collecting feedback from members of the public.

Why? To provide a central location for project information, updates, and activities, including public comment submissions.

Who? The audience includes members of the public with access to and knowledge of the internet.

Examples
DART, Des Moines, IA

Learn More

Page	Resources
90	Website development tools
118	Project website how-to guide

Agencies can create a dedicated website for members of the public to access all project-specific information. These websites can vary in size and complexity but tend to be comprised of sub-pages corresponding to different project elements and their informational materials. This approach can be particularly useful for creating virtual Open House experiences for stakeholders who may not be able to attend the typical in-person event.

Webpages to Promote Engagement

Numerous transportation providers create an online portal for their study or transit service initiative. One example is DART in Des Moines, IA, which led a comprehensive analysis of transit services and created a study webpage so individuals could learn more about how to participate in the plan. The graphic page included links to meetings, online surveys, and informational materials about the study that members of the public could access so they could provide informed feedback. The focus of the page was not on publishing documents, but rather to encourage people to participate in the process.

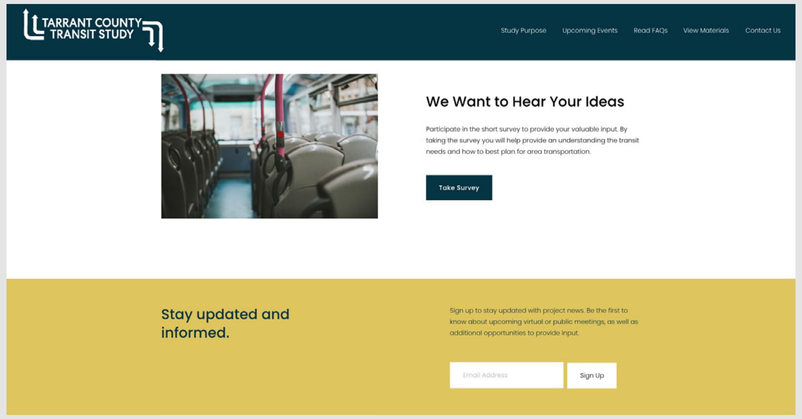
Considerations

Cost
Low. The cost of the website should be relatively low, depending on the development tool and plan selected (i.e., the project's needs). Most plans offer a monthly or annual payment schedule, which will continue throughout the life of the website.

Time Range
Indefinite. If it is a project specific-website, it can be used throughout the project and updated periodically.

Staff Commitment
Moderate. A large staff commitment may be required to develop both content and for formatting. Once the website has been published, the level of staff time should drastically decrease, accommodating routine maintenance and periodic updates. If comments are collected via the website, staff time will be required to periodically check and respond, as necessary.

Accessibility
- **Access is limited to users with access to, and knowledge, of the internet and a computer or phone.** Effort should be made to share information posted on the website with members of the public without access to, and/or an understanding of, these resources via text messaging or more traditional types of notice such as newspaper and/or radio advertisements.
- **WCAG 2.1 AA technical standards.** Designers should confirm project websites are compliant based on ADA guidance.
- **508 Compliance.** Create 508-compliant versions of documents posted on the website. This will help increase accessibility for stakeholders with varying levels of visual impairments.
- **Language Services.** Most internet browsers will translate pages based on a user's settings, but site developers may also use a translation plug-in that can translate the page into several other languages.



A transit study website in Tarrant County, Texas.

Meeting-in-a-Box

Quick View

What? A is kit of materials prepared by an agency and shared with stakeholders, usually community groups or neighborhood organizations. A meeting-in-a-box typically includes instructions on how to plan and conduct the meeting as well as project materials and feedback forms.

Why? To encourage informed, self-facilitated stakeholder discussions and solicit stakeholder feedback on a particular topic.

Who? The audience includes members of the public of all ages, particularly those who are already involved in community groups.

Example
Montgomery County Planning Department

Learn More
To learn more about Thrive Montgomery 2050's Meeting-in-a-Box, go to https://montgomeryplanning.org/planning/master-plan-list/general-plans/thrive-montgomery-2050/thrive-montgomery-2050-meeting-in-a-box/.

Page	Resources
120	Meeting-in-a-box how-to guide

Like a project website, a "Meeting-in-a-Box" allows stakeholders to learn about and provide feedback on a project on their own time. This approach can be used in lieu of or in tandem with public meetings, providing an opportunity for stakeholders to discuss project elements in an environment in which they feel comfortable and around others with whom they have a common goal or shared interest.

Using a Self-Directed Meeting Tool

To understand community priorities and inform the update to the Maryland-and Washington Regional District General Plan, the Montgomery County Planning Department invited community members to use their Meeting-in-a-Box for self-facilitated small group conversations and/or individual reflection at the stakeholder's convenience. The Meeting-in-a-Box, which was designed to provide an hour-long discussion, was made available on the department's website and could either be downloaded or completed directly via the webpage. A short video accompanied the packet, providing an overview of the process.

Considerations

Cost
Low. Costs will vary depending on the type of meeting materials provided to stakeholders. If the meeting packet consists of existing materials, the costs will be relatively inexpensive.

Time Range
Indefinite. The time range will depend on the period allotted for feedback on the project.

Staff Commitment
Moderate. Content curation and the development of instruction in the early stages will require a lot of staff time and consideration. Further, attention should be given to processing feedback and following up with stakeholders to thank them for participating and also if questions were posed.

Accessibility

- **Distribution.** A "meeting-in-a-box" distributed online is limited to access to and knowledge of the internet and a computer. To ensure the "meeting-in-a-box" is widely accessible, consider preparing physical packets that can be requested by phone or other means and providing notice in high-traffic public spaces.
- **508 Compliance.** Consider creating 508-compliant materials for the packet. This will help increase accessibility for stakeholders with varying levels of visual impairments.
- **Language Services.** Consider providing translated materials in different languages based on the community's needs.

A meeting-in-a-box can include group activities like walking tours to be led by partner organizations.

! Something Extra

If an agency would like community feedback on a specific site, they should consider adding instructions for a self-guided tour to a Meeting-in-a-Box. A self-guided tour can include a simple map that highlights the area of interest, a description of the potential changes under consideration, and prompts to which stakeholders can react. Providing this information will allow stakeholders to conduct a self-paced assessment of the site and provide feedback on proposed changes.

VIRTUAL ENGAGEMENT: TOOLS & APPROACHES

Form-Based Tools

Quick View

What? Form-based tools, such as online surveys and questionnaires, require participants to complete a form. Questionnaires are typically used to collect qualitative data and tend to use open-ended questions for participants to provide responses in their own words. Surveys are used to collect quantitative data, and tend to ask close-ended questions with a limited number of answer choices to facilitate statistical analysis later.

Why? To collect qualitative or quantitative feedback from stakeholders.

Who? The audience includes members of the public of all ages.

Example
Montgomery County Planning Department

Learn More
To learn more about the Thrive Montgomery 2050 Planning Quiz, go to https://thrivequiz2050.com/quiz/.

Page	Resources
88	Surveys and polling tools
122	Form-based tools how-to guide

Agencies rely on form-based tools, such as online surveys and questionnaires, to gather stakeholder feedback on a particular subject. Form-based tools can be used at the beginning of a process to understand stakeholder perceptions of, interest in, or needs pertaining to a particular subject. These tools may also be used throughout the process to gather feedback on a project's development, progress, and decisions over time.

Surveys and Comment Forms Offer an Avenue for Reactions and Suggestions

When the Montgomery County Planning Department needed to gather community feedback to inform Thrive Montgomery 2050, the update to their general plan, instead of using a traditional approach to form-based tools, they created a two-minute, 10-question quiz. Similar to any form-based survey, the quiz asked users to provide their opinion on a particular idea. Graphic with real-time results, the quiz provided users with an understanding of how their fellow community members responded. Unlike most surveys, this instrument allowed users to suggest questions to add to the survey.

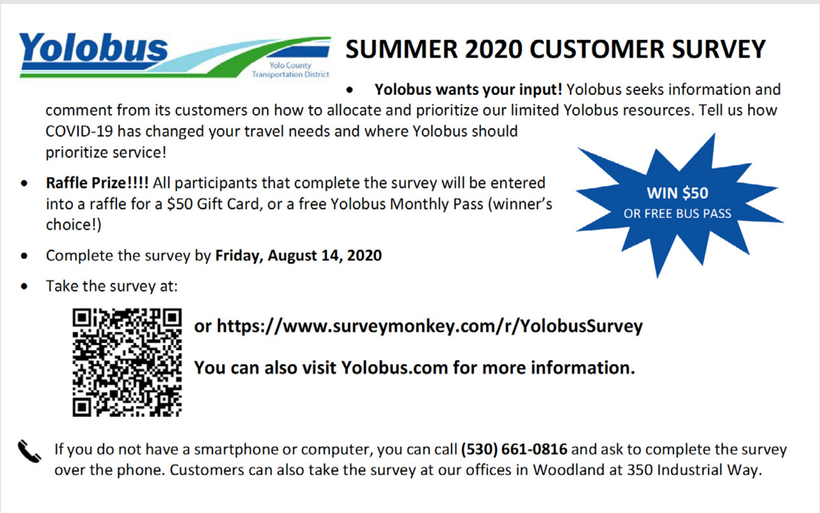
Considerations

Cost
Low. Costs will vary depending on the form development platform and the subscription package chosen, though, this tends to be relatively inexpensive.

Time Range
Short. Forms tend to be created and distributed in a relatively short time frame.

Staff Commitment
Low. Data analysis may be the most time-consuming aspect of the process, depending on the size of the data set.

Accessibility
- **Distribution.** A form distributed online is limited to access to and knowledge of the internet and a computer. To ensure the form is widely accessible, consider preparing printed materials and a drop box in high-traffic places such as supermarkets, religious, and community centers. Also consider distribution options via text or by phone.
- **Language Services.** Provide forms in different languages based on the community's needs.



Yolobus used a seat drop and a QR code to point transit riders to their customer survey.

VIRTUAL ENGAGEMENT: TOOLS & APPROACHES

Kiosk

Quick View

What? An information kiosk is a tablet or computer placed in a public, high-trafficked area, loaded with project information.

Why? To provide project information in an engaging way in frequently used public spaces.

Who? The audience includes members of the public of all-ages.

Learn More

Page	Resources
124	Kiosk how-to guide

Large transit agencies are no strangers to interactive kiosks for providing updates, directions, and retail services. Kiosk technology quickly and easily allows members of the public to conduct business or garner the information they need at their fingertips. While these kiosks tend to be expensive and complex to develop, much simpler and more affordable indoor kiosk options are also available, which can be used to share information and/or collect public feedback throughout the length of a project.

Considerations

Cost

High. Costs could include acquiring the device and stand, internet connectivity, subscribing to software, preparing signage, renting the spot the kiosk will be placed in, and hiring a someone to staff the booth.

Time Range

Indefinite. The time period needed can be informed by the length of the project as well as the agreement with the site.

Staff Commitment

Low. Staff will be required to load existing project information and periodically check for and troubleshoot any problems that arise.

Accessibility

- **Distribution**. A kiosk will share materials using a computer and, as such, stakeholders without knowledge of the internet and a computer may have challenges or feel less comfortable navigating the device. To ensure that many stakeholders have access to this information, consider hiring a representative to provide technical assistance and/or placing printed materials beside the kiosk.
- **Audio.** Provide an audio option. This will help increase accessibility for stakeholders with varying levels of visual impairments.
- **Language Services.** Provide materials in multiple languages.

Social Media

Perhaps one of the most used forms of online engagement, most agencies use social media as a means of providing updates to the public. Social media platforms provide a host of functions such as polling and commenting, that can facilitate various lines of communication between agencies and communities. Social media should be considered an important option for engagement beyond information sharing. Because social media is far-reaching, it can serve audiences that are not typically engaged.

Making the Most of Social Media

Some transit agencies post information on their social media accounts, such as Facebook and Twitter, infrequently if at all, and usually to announce major service disruptions or changes. The Denton County Transportation Authority (DCTA) in Texas regularly posts information on a blog that is intended to keep the dialog between the transit provider and the public ongoing and also creates videos and other tools for riders. DCTA regularly tweets about their initiatives and also posts to Facebook (they have used Hootsuite to update all of their accounts at once), and engages openly via social media with members of the public who ask questions or share concerns. DCTA staff believe this free and open dialog has benefited the organization.

Considerations

Cost

Low. Costs depend on the intended use of the application. Most social media accounts have no costs associated with joining and basic functions (providing updates, sharing and resharing videos, photographs, commenting, following trends etc.).

Time Range

Indefinite.

Staff Commitment

Moderate. Staff time is required to curate content and respond to feedback.

Accessibility

Accessibility is limited to users with access to and knowledge of the internet and a computer or phone. Effort should be made to share information with members of the public without access to or an understanding of these resources via text messaging or more traditional types of notice such as newspaper and/or radio advertisements.

Quick View

What? Account-based platforms that enable users to create and share content with one another.

Why? To provide updates and make announcements, or collaborate

Who? The audience includes members of the public of all-ages, though may more readily reach young to working age populations depending on the platform.

Example
Denton County Transportation Authority

Learn More

Page	Resources
91	Social media tools
126	Social media how-to guide

The Valley Transportation Authority actively promoted their Central Bikeway engagement though a variety of social media platforms and in different languages.

VIRTUAL ENGAGEMENT: TOOLS & APPROACHES

Virtual Engagement

4. Implementation

Chapter Questions

1. Which specific types of tools and applications are available?
2. How easy it is to get started?
3. How much do the products for virtual engagement cost?

Section page photo credit: Kearns & West
Photo credit: Artic Penguin

Tools & Applications

Many platforms and tools can support transportation organizations in facilitating and enhancing virtual engagement among key stakeholders and groups. This section outlines virtual engagement tools and provides examples of commonly used platforms. *This section does not provide an exhaustive list of tools or platforms.*

	Webinar & virtual meetings	Livestreaming & video	Scheduling	Surveys & polling	Email marketing	Website development	Social media & brand monitoring	Digital collaboration tools	Community outreach & planning	Mapping
Cost										
Complexity						*		*	*	*
Accessibility Features	3	2-3	2	2-3	3	2	2	1-2	2-3	1

Low (0-$50) Moderate ($50-$200) High (>$200)

Low High

* Indicates that an upper range of a consideration was provided. Other, less resource heavy and complex, options exists depending on the platform. See more details in the sidebar of each tool type.

Webinar & Virtual Meetings

Webinar and virtual meeting platforms are used to convene groups of people in a virtual setting. Webinars and virtual meetings and events can imitate in-person settings, as they offer the opportunity to remotely interact with stakeholders, share information, collaborate, and more. Many webinar and virtual meeting platforms offer free plans for users, though subscribing to a platform gives the user enhanced platform capabilities and functionalities.

Examples

Zoom is a video communications platform that offers video and audio conferencing, webinars, screen-sharing, live chats, polling, and other collaborative capabilities. This platform offers an interface that many organizations value for its simplicity. Zoom offers a variety of pricing plans to meet user needs depending on the meeting size, collaborative technology needs, and meeting objectives. Zoom meeting plans range from free to $75,000 per license annually.

Google Meet is a video-communication service that offers video conferencing, adjustable layouts and screen settings, screen sharing, and live chat. Notably, Google Meet also offers automated, live closed captioning during the meeting. This platform ranges from free to $25 per user per month.

Learn More

Other examples: Adobe Connect, GoToMeeting, Microsoft Teams, WebEx, RingCentral, BlueJeans

Page	Resources
44	Webinar
43	Virtual meeting

Cost
Low.

Complexity
Moderate.

Accessibility Features
High. Several features are available and can be activated as needed.

VIRTUAL ENGAGEMENT:IMPLEMENTATION

Livestreaming & Video

Learn More

Other examples: Facebook Live, Instagram

Page	Resources
44	Webinar
43	Virtual meeting
52	Pre-recorded presentations
73	Video overview

Cost
Low.

Complexity
Moderate level of complexity.

Accessibility Features
Accessbility features vary from moderate to high.

Livestreaming and video platforms enable users to broadcast virtual meetings or events to participants and host videos online. These tools are especially useful for transmitting live events and recorded meetings to stakeholders.

Examples

YouTube is an online social media platform for sharing pre-recorded videos or livestreaming. This free platform allows users to watch videos posted by other users and upload videos of their own. YouTube also offers tools to broadcast and manage livestreams and interact with viewers in real time.

Vimeo is a video-sharing platform that allows users to create and share videos and livestreaming. This platform offers many features that allow users to customize video uploads and livestreams, meet accessibility standards, and embed videos within mobile and web-based sites. Additionally, videos can be shared publicly or kept private (or password-protected to restrict access.) The cost of this platform ranges from free to $75 per month.

Scheduling

Virtual scheduling platforms can help to simplify scheduling and event logistics by creating RSVP lists, setting meeting dates & times, and sharing event details with stakeholders.

Examples

Doodle is an online scheduling tool that can be used to quickly find a date and time to meet with multiple people. This platform ranges from free to $30 per month with additional features.

Eventbrite is a platform that helps users create, browse, and promote a wide variety of local events. This platform enables users to create customizable event pages, run targeted email and social media campaigns, and analyze attendee characteristics and demographics. The goal of the platform is to simplify ticketing and registration for any type of event. There is no charge for free events.

Learn More

Other examples: Microsoft FindTime

Cost
Low.

Complexity
Relatively easy to use.

Accessibility Features
Some accessibility features provided.

VIRTUAL ENGAGEMENT:IMPLEMENTATION

Surveys & Polling

Learn More

Other examples: Google Forms, SurveyMonkey, Microsoft Forms, Mentimeter

Page	Resources
44	Webinar
43	Virtual meeting
122	Form-based tools how-to guide
78	Form-based tools overview

Cost
Moderate. Some tools are free but more robust options require modest investment.

Complexity
Relatively easy to use.

Accessibility Features
Most offer good accessibility features.

Survey and polling tools can be used to collect qualitative and quantitative information and feedback from stakeholder groups and add interactive elements to virtual meetings. Surveys and polling help to inform specific questions in a clear manner.

Survey and polling tools can be implemented relatively easily into the virtual engagement process. Often, webinar and virtual meeting platforms include in-meeting polling options that can be displayed during the meeting. There are also a variety of external survey and polling platforms that can be integrated at no cost or at a moderate cost.

Examples

Google Forms is a survey administration platform that enables users to create surveys and edit them with others at the same time. The platform offers survey templates, so creating a survey can be done quickly and easily. Questions may be formatted as multiple choice, linear scale, short answer, paragraph, or checkbox.. Once a survey has concluded, responses are analyzed and organized into easily digestible infographics and charts. This platform is free with a Google account.

Poll Everywhere is a polling platform that displays polling results in real-time through bar charts, word clouds, circle graphs, and more. Poll Everywhere can be embedded within presentation platforms, such as PowerPoint and Google Slides, to allow for seamless, interactive engagement during a presentation. The price of this platform ranges from free to $84 per month.

Qualtrics is an online survey tool that allows users to develop and distribute surveys with graphics, branching, and randomization. Key features include feedback collection, concept testing, product prioritization, opportunity assessment, and reporting. Qualtrics plans range from $1,500 to $5,000 per year.

Emailing Marketing

Email marketing is the process of distributing information to a targeted audience through email. This is an efficient and cost-effective way to engage stakeholders, share information, advance brand awareness, and promote upcoming activities and initiatives. Many platforms exist to aid in creating engaging email marketing campaigns and developing well-designed content.

Examples

MailChimp is an integrated email marketing platform that offers the ability to create and manage mailing lists, newsletters, and automated campaigns. This platform includes a variety of tools to help design newsletters, receive audience insights, and create compelling content. MailChimp also enables users to access insights into digital marketing efforts by collecting data on click-through and open rates, audience engagement, social performance, and more. The price of this platform ranges from free to $300 per month

Constant Contact is digital marketing software that offers email and social marketing tools, website development, and more. Constant Contact's email marketing service offers subscription forms, customized templates, mobile-responsive email campaigns, and an editing dashboard to make creating and transmitting email marketing content as simple as possible. This platform ranges from $20 to $45 per month.

Learn More

Other examples: Marketo, NationBuilder, Nixle

Page	Resources
70	Newsletter overview
112	Digital newsletter how-to-guide

Cost
Moderate.

Complexity
Moderate. Requires understanding of the program to implement.

Accessibility Features
High. Most tools offer accessible emails.

Website Development

Learn More

Other examples: Weebly, Google Sites, Wix

Page	Resources
74	Project website
118	Project website how-to guide

Cost
Varies from low to high, depending on quantity of information and features.

Complexity
Moderate.

Accessibility Features
Moderate. Websites can offer excellent accessibity feratures if organizations opt to include them.

Website design and development is an important virtual component for any transportation agency or organization since it shapes how stakeholders perceive an agency's brand and reputation. A well-designed website that optimizes the user experience can effectively communicate information and updates, share resources, engage the community, and improve connectivity with stakeholders. While designing and developing a website can be a more advanced task, there are many online platforms to guide the process and optimize digital reach.

Examples

Word Press is a virtual system that aids users in developing and managing a website. This platform aims to simplify the website development process by offering customizable site layouts, a media file library, easy-to-navigate settings and content dashboard, and add-ons that help meet the objectives of any website. Word Press also offers built-in search engine optimization (SEO) and analytics tools to analyze website performance and engagement data. This platform ranges from free to $45 per month.

SquareSpace is a website building and hosting platform that lets users create a website in a web browser without coding. This platform offers website templates, navigation, and menus, as well as a variety of fonts, imagery, and margins within the built-in styles. SquareSpace also features SEO and analytics tools to maximize visibility among internet search results and understand website traffic. This platform ranges from $12 to $40 per month.

Google Analytics is a free web analytics tool that tracks and reports website traffic and the performance of marketing and content. Once an agency associates their website with Google Analytics, the tool will begin collecting data on website views, pageviews, user activities and sessions, average time on page, bounce rate, entrances, and exit rate. These data points can be helpful to inform whether a website is used, the rate of engagement among site users, and what users are doing on the site.

Social Media & Brand Monitoring

Social media and brand monitoring tools help optimize the performance of digital content. These tools aid in curating social media content, managing targeted stakeholder lists, scheduling posts and digital outreach, and analyzing performance metrics of social media and online content.

Examples

Cision is an media software and service that allows users to identify and manage targeted lists of stakeholders based on interest area. It can craft and distribute strategic pitch content and analyze engagement rates. This platform costs approximately $7,200 per year.

Hoot Suite is a social media marketing and management dashboard that allow users to curate social media content, schedule posts, coordinate project management, and measure content performance analytics. Plans range from $49 to $599 per month.

Learn More

Other examples: Tweet Deck, Talkwalker, Meltwater

Page	Resources
81	Social media
126	Social media how-to guide

Cost
Moderate for basic tools, but can be high for comprehensive packages.

Complexity
Moderate level of complexity.

Accessibility Features
Moderate.

Data Collaboration Tools

Learn More

Other examples: Ethelo, Modria, MURAL, Padlet, Participate.online, Trokt

Page	Resources
56	Online collaboration

Cost
Moderate. Some tools are free but many others require a subscription.

Complexity
Moderate.

Accessibility Features
Many collaboration tools have limited accessibility features, expecially for people with low vision or blindness.

Digital collaboration tools provide the opportunity for groups of people to work together creatively to address issues and topics of concern. While many virtual meeting and webinar platforms offer in-meeting collaboration tools, such as virtual whiteboarding and annotation, there are a number of external digital tools that can aid the collaboration process.

Examples

Miro is an online visual collaboration whiteboarding platform. Through Miro, users can create virtual sticky notes and designs, move items around, and communicate through embedded video calls or online chats. This platform also offers pre-built templates as a starting place for collaborative work. The platform ranges from free to $10 per user per month.

Codigital is a digital collaboration tool that enables large groups to generate, prioritize, and refine ideas. Participants can vote, edit, or add ideas, creating a population of answers to choose from. Pairs of answers are shown to different people and each time, they are asked to pick the one they prefer. Statistical analysis of all these head-to-head comparisons identifies the best answers and they are selected to “survive” into the next round of rankings.

Community Outreach & Planning

Community outreach and planning tools offer a variety of services to engage with stakeholders in different ways. They are designed to reach a diverse set of stakeholders, and especially hard-to-reach communities. Incorporating community outreach and planning tools may supplement or enhance a transportation agency’s engagement process by enabling them to broaden outreach, collect greater data, and make well-informed decisions.

Examples

Bang the Table is a digital engagement platform for community outreach and public participation in local and regional government processes. The platform offers a suite of engagement tools for surveys, polling, Q&A, ideation, mapping, virtual forums and more. To complement these tools, Bang the Table also offers a dashboard of analytical tools that help users analyze feedback on results and processes, benchmark progress against industry standards, and evaluate upcoming project interests, critical areas, and important stakeholders. Services typically cost between $1,000 and several thousand dollars per month.

MetroQuest is an online public involvement platform that develops engagement surveys specifically for urban transportation planning. The platform includes virtual and interactive elements designed to educate the public and gather informed feedback. MetroQuest helps users design surveys that are short and impactful, multi-device compatible, and cost-effective, and include micro-learning opportunities. This platform costs $4,000 per month.

Learn More

Other examples: NationBuilder, MindMixer, coUrbanize

Cost
High.

Complexity
Varies based on objectives.

Accessibility Features
Accessbility features vary from moderate to high.

Mapping

Learn More

Other examples: ESRI, Crowdspot, Wikimaps

Incorporating interactive mapping tools into public engagement efforts can be especially useful during transportation planning processes. Existing digital tools can be used to create maps that collect data from participants to inform planning processes.

Example

Maptionnaire is a community engagement platform that engages participants through mapping activities to collect survey data. This tool enables users to design map-based questionnaires, polls, and surveys to synthesize data and arrange participatory budgeting. Insights from the questionnaires are converted into digestible insights to develop a greater understanding of the results. This tool costs more than $6000 for an annual plan.

Cost
High.

Complexity
Moderate to high.

Accessibility Features
Mapping tools often have have limited accessibility features, expecially for people with low vision or blindness.

Additional Guidance
Accessibility & 508 Compliance

Section 508 of the Rehabilitation Act (29 U.S.C. § 794d) requires federal agencies to develop, procure, maintain, and use electronic and information technology that is accessible to people with disabilities – regardless of whether they work for the federal government. Accessible digital products include electronic content such as documents, videos web pages, presentation, social media content, and certain emails. This section overviews some types of virtual content that a transit agency might need to make accessible.

Create Accessible Video and Audio

Section 508 requires all users, regardless of disability, to have a comparable experience engaging with all forms of government media, including videos. For a video to be accessible to a viewer, the person watching it must be able to understand what is happening in both the visual and audio portions of the video. Videos that meet the standards of Section 508 and are accessible to the disabled are known as being "508-compliant." The following three elements are needed to have a 508-compliant video:

Legal Requirement	Standard
508-compliant video player	Ensures a person who requires keyboard navigation, or an assistive device can navigate the window where the video plays (that is, the video player).
Closed captioning	The audio parts of your video appear as text at the appropriate time and give access to people who are hearing impaired or deaf.
Audio description	A description of a video's visual elements, gives access to people who are blind or visually impaired.

Learn More

To learn more about how to make digital content 508-compliant and access helpful resources, visit here.

For additional resources and guidance on creating accessible video and audio content, visit here.

Learn More

To access additional resources on creating accessible social media, review the Federal Social Media Accessibility Toolkit Hackpad here.

Create Accessible Social Media

Many entities are increasingly using social media to conduct outreach, engage with stakeholders, and share information and resources. As social content, data, and platforms become more diverse, agencies have a responsibility to ensure that their social media content is accessible to all citizens, including people with disabilities.

When making Facebook posts more accessible, there are several tips that users should consider.

- Add captions to photos to ensure that individuals understand what is occurring in the pictures. Captions do not need to be long, but they should describe what the scene is and how the elements of the image appear to provide context for the image.
- When including acronyms, always spell out the first instance of the acronym and add the acronym in parentheses after. This tip is especially helpful for individuals who use screen readers because it always the user to better associate the sound of the acronym with the full name.
- Videos uploaded directly to Facebook should include closed captioning.

There are several tips that users can employ when looking to make their Twitter account more accessible. Users can enable the setting on Twitter to use the "image description" feature. This will allow users to include a descriptive caption to any photo that is directly included within a tweet. Consider including an indication that a link in a tweet is a photo, video, or audio file by including "[PIC]," "[VIDEO]," or "[AUDIO]." This allows users employing screen readers to know what to expect before opening a link. Additionally, ensure that linked content is accessible, such as a tagged photo, captioned video, or audio with a written transcript.

Instagram does not currently include settings that enable alternative text, so users should provide a detailed caption to describe the posted image. Similarly, Instagram does not currently include the ability to add closed captioning to videos, so users should provide a detailed caption that describes what is happening in the video or add closed captioning within the video file before it is uploaded to Instagram.

Create Accessible PDF and Word Documents

Section 508 set forth accessibility standards that require electronic document accessibility for everyone, including individuals with disabilities. Users should assign the appropriate styles and formatting. For example, the documents title should be formatted as "Title" and the primary header for that page should be "Header 1." This ensures that page readers are able to read through the document accurately. It is also recommended that users employ an accessibility check to ensure that there are no web accessibility problems. Both Word and Adobe Acrobat enable users to run accessibility checks on documents within the platform.

Learn More

To learn more about how to create 508-compliant Word documents, visit here; for PDF documents, visit here.

Engaging Vendors

With seemingly endless virtual engagement platforms and digital services offered, it can feel overwhelming to choose the right platform or service.

Schedule a Call with a Sales Agent or Representative

When looking to engage a vendor, it is considered a best practice to schedule a call with a sales agent or platform representative, instead of relying solely on the platform's website or secondary sites. Individuals should identify the core needs of their use and confirm with the representative that these needs are included within the proposed license or service agreement. Speaking with an agent or representative directly is more likely to ensure that a license or service is specifically customized to an individual's need, and may also allow the representative to share any promotions.

Understand the Duration of the License or Service Need

Individuals should understand how long they will need to use the license or service. When determining duration, consider the length of the project or engagement, and build in time for planning considerations, such as setting up the tool and any post-engagement needs. Additionally, individuals should understand the contract for extending the duration of the license or service, or adding more users.

Confirm Budget Needs

It is recommended that individuals understand the scope of their budget for the license or service. For example, webinar platforms are likely to bill for their service on a monthly or annual basis, while closed captioning or translation/interpretation vendors are more likely to bill on a per hour basis.

Use Quotes Competitively

In a time where resources are constrained, individuals might consider using quotes competitively between platforms and vendors to receive the best deal and value. For example, if an individual receives a specific quote from one webinar platform, consider taking that quote to a secondary platform to understand if the secondary platform can match or beat the price.

Identify the Legal Requirements for the Project

Transportation organizations should understand the legal requirements of a specific project or engagement event before confirming a platform or service. For example, there is a difference between offering closed captioning and including court reporting within an engagement event. These two services would likely require different vendors.

VIRTUAL ENGAGEMENT:IMPLEMENTATION

Conclusion

5. Fostering a Culture of Expanded Public Engagement

Section page photo credit: Errol Young
Photo credit: Laura James from Pexels

Fostering a Culture of Expanded Public Involvement

With COVID-19 vaccine roll-outs accelerating in communities in the first half of 2021, what future will that leave for virtual public engagement? Will participant Zoom fatigue, ongoing equity and accessibility challenges, and roadblocks to the quality of virtual engagement incentivize agencies to transition back to traditional in-person engagement as soon as it is safely possible?

This Guidebook's focus is on resources to design and execute effective virtual public engagement activities that are cost-effective, inclusive, and sustainable in the long term, recognizing the limitations of online tools and virtual experiences.

High levels of public participation, community buy-in and support, and stakeholder responsiveness are useful benchmarks, whether a transportation organization is trying to inform, engage, or persuade constituents. At its best, public involvement activities can provide a feedback loop that improves the goals and programs across an organization. Effective public information tools and dashboards, marketing and promotional activities, a regular cadence of soliciting community input, growing a responsive social media presence, nurturing community-based partnerships: all of these strategies help foster a culture built on public involvement, community engagement, and stakeholder collaboration.

No single resource is exhaustive, particularly when it comes to a topic as broad as virtual public engagement. The Guidebook appendices offer user guides for implementing many of the engagement strategies outlined in previous chapters. They also include case studies from transit agencies, human service transportation providers, and MPOs across the country, which highlight how peer organizations are innovating in the digital space, often with the customary limitations of a small team or tight budget. The appendices conclude with resources that can be useful for the development of an organization's virtual public engagement plans.

The work of a transportation organization is made better when the voices of its consumers and partners are considered in policymaking, program development, and day-to-day operations. In developing this Guidebook, many of the organizations that were consulted acknowledged that they could do a better job of public and community involvement, and saw the value of inclusive engagement through advisory committees, special events, and more varied approaches for consulting with their users. Many of these organizations added that the primary obstacle they face in advancing their public engagement work is that their staffing is constrained, and existing staff often do not have the capacity to carry out more public engagement.

Virtual engagement has allowed some of these organizations to be more nimble because they have seen cost savings related to hosting online meetings and surveys, compared to in-person activities. However, shifting a standing meeting online does not fulfill the goal of meaningful public engagement. An effective virtual public engagement effort makes use of a combination of tools and strategies to reach a set of diverse audiences. Developing this mix of approaches requires transportation organizations to be strategic in identifying

(1) the markets they seek to engage;
(2) the opportunities for reaching those markets; and
(3) the potential obstacles or limitations those markets may encounter when trying to participate.

Depending on the obstacles, an organization may need to develop alternatives that include in-person activities as part of the overall engagement effort. An organization seeking to advance its engagement efforts may also need to hire additional staff or invest in training opportunities for current staff.

FOSTERING A CULTURE OF EXPANDED PUBLIC ENGAGEMENT

Appendices
Resources

Appendix Questions

1. How can agencies prepare materials, content and other engagement materials?
2. What templates are available?
3. How are other transit agencies conducting virtual engagement?

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Photo credit: Jonathan Cutrer

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How-to Guides

Learn More

Pages	Helpful Resources
69	Fact sheet overview

Tools

Document publishing tools: Microsoft Word, Microsoft Publisher, InDesign

Graphic resources: Noun Project (icons); Unsplash, Pexels, and Shutterstock (images)

Fact sheets

Step.

1. **Determine the topic and key points you wish to share.**
   A group brainstorming session can be helpful when trying to determine the most important points for the audience you hope to reach.

2. **Draft fact sheet text including the headers, sub-headers, body text and contact information.**
   Remember that a fact sheet is meant to be concise. Review draft text to ensure that it is not overly word or complex. Consider if there are ideas in the text that can be better expressed using an image, diagram, or icons.

3. **Create a mock-up of the fact sheet template.**
   An easy way of doing this is by adding colored rectangles on an empty page (typically 8.5x11 inches) where you intend to add text and images. Move the rectangles around until you are satisfied with the layout. Consider adding a call-out-box (a section that is slightly different in formatting than the rest of the sheet) to highlight the most salient information.

4. **Drop the text into the fact sheet according to the template.**
   It is unlikely that the text will fit perfectly into the allocated section when it is first placed. Continue tweaking the layout and formatting until the text fits — decrease the margins a small amount, change font size or spacing, decrease spaces between columns, etc. Be careful not to over-adjust the layout to accommodate text. If you have to do too much for text to fit, it probably means you have too much text to begin with!

5. **Add relevant images in the allotted spot.**
   Tweak the image size, text formatting, and document layout, as necessary. Ensure to include the appropriate citation.

6. **Review and revise fact sheet.**
   Ask someone outside of the immediate team to review the fact sheet. Does it make sense? Are there any errors? Is there too much information? It is always helpful to have another set of eyes to provide feedback. It is always helpful to test print digital materials, both for the editing process and in the event that a stakeholder will do so.

Best practices

1. Be clear and concise.
2. Simplify complex ideas.
3. Make the document visually appealing (use informational graphics and diagrams; avoid blocks of dense text; leave ample white space).
4. Use consistent terminology.
5. Provide contact information (social media, website, phone numbers and email addresses).

Digital Newsletter

Learn More

Pages	Helpful Resources
70	Newsletter overview
89	Email marketing

Tools

Text editing tools:
Microsoft Word

Marketing software:
MailChimp, Nation Builder

Graphic resources:
Noun Project (icons)

Step.

1. **Determine the topic and key points you wish to share.**
   A group brainstorming session can be helpful when trying to determine the most important points for the audience you hope to reach.

2. **Draft the newsletter text including the subject line, headers, sub-headers, body text and contact information.**
   Great newsletters provide project information in an interesting and engaging way to audiences. The subject line needs to be attention grabbing to motivate the reader to read further. Body text should be consistent with and follow up on what has been written prior, providing information that is pertinent to the lives of audiences. Consider sharing project images, videos and infographics that can communicate important content in a more approachable way.

3. **Select a newsletters template.**
   This should be done in the marketing platform you intend to use (e.g., MailChimp). Note that you should be consistent from newsletter to newsletter, so be sure to select a template that best meets current and future needs and desires. Make sure that the newsletter complies with the agency's brand identity, including color scheme, logo, header, and footers, as needed.

4. **Drop the text into the newsletter according to the template.**

5. **Add relevant images in the allotted spot.**
   Adjust the text and layout to accommodate the images, as necessary. Ensure to include the appropriate citation.

6. **Review and revise the newsletter.**
   Send the newsletter to someone out of the immediate team and ask for feedback. Does it make sense? Are there any errors? Is there too much information? It is always helpful to have another set of eyes to provide feedback.

Best practices

1. Use catchy and attention-grabbing language, when possible.
2. Be brief.
3. Share relevant project images that cannot be found elsewhere.
4. Make the document visually appealing — do not shy away from color and blank space.
5. Use consistent terminology within and across newsletters.
6. Provide contact information (social media, website, phone numbers and email addresses).

Learn More

Pages	Helpful Resources
71	Podcast overview

Tools

Hardware: Microphone or cell phone, shock mount, pop filter, boom arm, headphones.

Editing software: GarageBand (Mac), Audacity, Power Sound Editor, Music Maker, Adobe Audition.

Streaming services: Spotify, Apple Music, SoundCloud, Pandora

Podcasts

Step.

1. **Determine the content the agency hopes to share.**
   Before diving into podcasting, it is important to think through the content that can be produced and the amount of interest it can garner. Create a short list of episode topics and elements, consider questions like — What will the podcast focus on? Who is the target audience? Which individuals can join as guests?

2. **Flesh out the logistics.**
   Having the desired content and audience in mind can help an agency understand logistics such as the podcast's name, episode length, streaming service, and formatting (solo, cohost, or interview).

3. **Draft a script for the first episode and practice with it.**
   Determine the extent to which the podcast should be scripted. While it may be tempting to write an essay, consider the fact this medium is most successful when it feels as though the presenter is having a conversation with audiences. As such, try starting out with a basic discussion outline including high level points and adding details based on the level of need and comfort. Once a script has been drafted, present it to others.

4. **Acquire the device(s) and practice with them.**
   Test the equipment to determine if any adjustments should be made. Try talking into the mic, presenting from the script, and editing content. Listen out for breathing sounds or background noises, which may indicate that the pop filter is out of place.

5. **Record.**

6. **Edit.**
   Edit the recording to remove long pauses, errors, boring or tangential parts of conversation. Share the recording with others for feedback on points that need to be clarified or removed.

7. **Post and share.**
   Post each episode on the streaming service according to a predetermined schedule. Share the episode widely on social media platforms to raise awareness.

Best practices

1. Prepare an episode calendar and stick to it.
2. Promote the podcast.
3. Invest in a good microphone.
4. Provide background information when something new is referenced.
5. Provide a look ahead to the next episode to build anticipation.

Learn More

Pages	Helpful Resources
73	Video overview
86	Livestreaming and video tools

Tools

Hardware: Camera, video camera or cell phone camera, tripod, reliable light source

Editing software: Lightworks, Movie Maker, Adobe Premiere, iMovie

Streaming services: YouTube, Vimeo

Videos

Step.

1. **Determine the content the agency hopes to share.**
Before creating a video, it is important to think about the goal the agency hopes to achieve and the audience it hopes to reach. Create a list of topics that need to be covered in the video and consider the following questions: How much information does the agency need to share? Are there any topics that can be addressed at another time? Is there enough background information on this topic or should it be provided in the video? Will this content resonate with the audience the agency hopes to reach?

2. **Flesh out the logistics.**
Once the content has been determined, the agency should consider who will participate in the video, how and where the video should be recorded and formatted, and the resources that will be needed to produce it. If the video is used in lieu of an in-person event, it might be helpful to film members of staff, to provide a more human touch.

3. **Draft a script.**
Use the refined list of topics to draft a script. Pay close attention to the language in and tone of the script, which will vary depending on the intended audience. If the video is for the general public, avoid using technical jargon and try to use a warm and welcoming tone. Consider the length of the script — aim to strike a balance between being brief, but informative. If a long script cannot be avoided, try to have different speakers lined up to reduce the chances of monotony.

4. **Acquire the device(s) and practice with them.**
Test the equipment to determine if any adjustments should be made. Try reading the script in front of the camera in the place and at the time the video will be shot. This will help determine lighting, set, and sound needs and adjustments. Also practice editing the content.

5. **Record.**

6. **Edit.**
Edit the recording to remove awkward starts, long pauses, errors, and tangential parts of the video. Share the recording with others for feedback on points that need to be clarified or removed.

7. **Post and share.**
Post and share the video widely on social media platforms and the agency's website to raise awareness.

Best practices

1. Promote the video.
2. Provide background information when something new is referenced.
3. Pay attention to unwanted background sounds and visuals as they can be distracting.

Learn More

Pages	Helpful Resources
74	Project website overview
90	Website development

Tools

Website development platforms. WordPress.org, WordPress.com, Weebly, Drupal, Squarespace

Website hosting platforms. WordPress.com, Weebly, GoDaddy, Bluehost

Website translation plugins. Translate Press, WPML, Polylang (WordPress specific); ConveyThis (Weebly)

Website management tools. Google Analytics

Project Website

Step.

1. **Determine the content the agency hopes to share.**
Create a content list that will provide an adequate amount of information to the public on a particular topic. This list could include existing materials not widely available or new materials that have yet to be developed.

2. **Flesh out the logistics.**
Having the desired content and audience in mind can help an agency understand logistics such as the website's name, number of pages, basic layout, and desired features and functionality.

3. **Create a domain name.**
Deciding on a domain name should be relatively simple, given that it will most likely be linked to the name of the project. Be sure to do a web search of potential names before selecting one.

4. **Choose a web hosting and web building platform.***
The first part of this step, choosing a hosting platform, is optional. Some web building platforms, like WordPress.com and Weebly, are able to host websites as well, though, there are limitations to the extent an agency can customize these websites. If an agency chooses to use a web hosting platform, they should ensure that it is compatible with the web building platform they choose.

5. **Prepare website content including text, graphics, links, etc.**
Once the web building platform and its features have been identified, it will be clear what form of content is most appropriate for the site. Draft introductory text for pages and embedded content such as pdf documents, images, or videos.

6. **Determine website layout.**
There are several different templates from which to choose. Decide which template will best communicate the content being prepared. Create a mockup of website pages with filler or draft content and share them for feedback. Consider how best to navigate the website and adjust the layout as needed. After the desired layout has been determined, it might be helpful to save all content that will be uploaded to the website in file folders organized by page. This will be particularly useful in the next step.

7. **Upload finalized content.**
After ample testing, upload the final content to the website. Be prepared to tweak the layout or alter content.

8. **Test.**
Test all aspects of the website page by page. Move through the website systematically, noting all errors, such as missing or broken links, grammatical or spelling errors, misaligned content, etc. Correct all errors and then test again. Have multiple people test the website to ensure all is well. During this process, it is best to passwords protect the website and share the password as needed.

9. **Publish and share.**
Finally, after several rounds of testing and editing, the website can be published. Do not forget to promote the website on social media, in newsletters and on informational materials.

Best practices

1. Update content as often as necessary.
2. Test the website periodically to ensure all links and features are functional.
3. Provide contact information.
4. Be consistent.
5. Avoid using dense text.
6. Use graphics such as images and icons.

Learn More

Pages	Helpful Resources
76	Meeting-in-a-Box overview

Tools

Document publishing tools. Microsoft Word, Microsoft Publisher, InDesign

Graphic resources. Noun Project (icons); Unsplash, Pexels, and Shutterstock (images).

Meeting-in-a-Box

Step.

1. **Determine the goal of the meeting-in-a-box.** What information does the agency hope to share and receive feedback on?

2. **Brainstorm appropriate content and materials.** Identify existing materials that will enable stakeholders to provide well-informed feedback. These materials can be in a wide array of formats from video to text. If there are information holes or existing materials are not suitable for this engagement approach, consider creating new materials or updating current materials. As always, the aim is to have materials that break down complex ideas into simple and clear language.

3. **Prepare instructions and meeting approach.** Once meeting materials are squared away, consider the best way for the group to work through them. Ensure the host guide includes things such as: a definition of roles (facilitator/host), meeting instructions (purpose, time and materials needed), stepwise approach for planning and conducting the meeting (notice guide, material list and set up, a meeting facilitation plan, and agenda), and information on how to return feedback.

4. **Collate materials.** Put all the pieces together in a format that is easy to retrieve online, such as PDF file format. Make sure that it is easy for stakeholders to distinguish between sections of the packet (i.e., host versus participant materials) so that the meeting host can distribute documents accordingly.

5. **Post to website and/share with stakeholder contact list.**

Best practices

1. Provide clear and detailed instructions for meeting facilitators.
2. Clearly introduce the project, its goal and the purpose and objectives of the meeting.
3. Clearly state how stakeholder feedback will be integrated into the decision-making process.
4. Share contact information.
5. Share information on other means of getting involved and provide a sign-up sheet for interested participants to sign up for updates.

Form-Based Tools

Step.

1. **Determine the information the agency hopes to learn.**
Identify the information gap the agency needs to fill and the target audience needing to fill it.

2. **Draft a list of questions for participants to answer.**
When drafting questions, bear in mind the objective of the engagement, the audience, and length of time. If there are too many questions, participants will be less inclined to complete the instrument. Too few, and the agency may not receive the information they required. Be intentional when preparing questions, ensuring that each question can provide a response with additional information from the one prior.

3. **Flesh out the logistics.**
Discuss the approach the agency will undertake considering questions like — given the target audience, how should this form be distributed? When should the form be available and for how long? How will the information be analyzed?

4. **Choose a platform.**
Answering the questions above will help agencies decide which platform will best serve their needs.

5. **Upload content.**
While the questions will be the primary content uploaded the form, agencies should consider uploading images and videos that can help provide a more rounded understanding of the questions being posed. For example, if the agency is asking a question about the preferred location of a bus stop from multiple options, it might be helpful to provide images for participants to provide well-informed feedback.

6. **Test.**
Test the form question by question. Share with others to test the form as well, asking questions like — Where there any questions that were not clear? How long did it take to complete the form? Were there any questions that felt repetitive?

7. **Share.**
Finally, after several rounds of testing and editing, the form can be made available to the public. Do not forget to promote the instrument on social media, in newsletters and on informational materials.

Learn More

Pages	Helpful Resources
78	Form-Based tools overview
88	Surveys and polling

Tools

Form development platforms: Survey Monkey, Google Forms, TownHallApp

Best practices

1. Be clear and concise.
2. Test the instrument (i.e., the survey or questionnaire).
3. Include fields to collect demographic data when possible (age, sex, address, education, etc.).
4. Include images to help participants visualize options.

Learn More

Pages	Helpful Resources
80	Kiosk overview

Tools

Hardware: Tablet, a tablet stand, and internet connection.

Software: Kiosk specific browser (e.g., Kiosk Pro App).

Kiosks

Step.

1. **Determine the information the agency hopes to receive or share.**
   Create a short list of locations the agency might want to place the kiosk and confirm their interest and requirements.

2. **Think through a list of locations that might be amenable to having a kiosk and that will also best meet the goal of the project. Consider locations such as lobbies of religious and community centers, libraries, etc.**
   Places with wireless internet that people frequent and spend an extended period of time.

3. **Determine the best way the desired information can be shared or garnered online.**
   Perhaps the agency hopes to receive feedback on a recent change. This information might best be collected via an online survey. If the agency hopes to share an important project update, consider recording and uploading a video the website. Whatever the case may be, choose a web-based option that is most suitable and engaging for the environment in which the kiosk will be placed.

4. **Acquire the device(s) if the agency does not already have one.**
   If possible, consider purchasing a gently used second-hand device. If intending to use a video, consider audio devices that might be necessary such as headphones or speakers.

5. **Download and install the kiosk specific browser on the tablet.**
   Consider using a kiosk specific browser, which prevents users from navigating away from the intended pages.

6. **Set up the webpage on the kiosk.**

7. **Prepare materials to accompany the kiosk.**
   Since the kiosk is small, it might be helpful to prepare marketing materials such as flags, banners, posters, or signs to place around the kiosk to catch patrons' attention. It is also important to include instructions on how to use the kiosk as well as printer materials of the same information that is being displayed.

8. **Set up the kiosk and materials at the chosen location.**

Best practices

1. Ensure that the device cannot be moved and is placed in a secure location.
2. Periodically check the device to ensure that it is working.
3. Prepare adequate signage to alert patrons of the device.
4. Provide simple and clear instructions on how to use the kiosk.
5. Clean the kiosk when possible.

Learn More

Pages	Helpful Resources
81	Social media overview
91	Social media tools

Tools

Social media platforms. Facebook; Instagram; Twitter; YouTube; TikTok; Reddit; Tumblr; LinkedIn; Snapchat;

Management tools. TalkWalker; Sysomos; Sunthesio; Sprout Social; Social Mention; Pulsar TRAC; Meltwater; Hoot Suite; Falcon.io; Buffer; Brandwatch; Cision, Cyfe; Buffer.

Best practices

1. Ensure messages are clear and concise.
2. Provide messages in multiple languages based on community's language needs.
3. Provide information across multiple platforms.
4. Prepare staff guidance on social media etiquette.

Social Media

There are several social media applications from which to choose. When deciding which application will work best for projects, particular attention should be paid to the types of information that will be shared and the intended audience with whom it will be shared. Patterns of use are constantly changing and, therefore, it is best to keep abreast of the changing demographics and functionality of each tool. Further, given the wide array of available social media tools, the functionality of each tool is constantly expanding to remain competitive, and thus, the utility of each tool may change over time.

Along with social media applications, there are additional tools that can be used to make managing accounts easier, especially when managing multiple accounts across different platforms. The functionality of these tools varies widely, as some can manage the simple day-to-day activities on a single social media account, such as scheduling posts, while others can provide a host of analytics and reporting on social media campaigns across multiple platforms. Of course, the more complex and comprehensive the service provided by the management tool, the higher the associated costs.

Case Studies

Valley Transportation Authority

VTA is a large urban and suburban transit system in the southern portion of the San Francisco Bay Area. Public engagement has been an important function for the organization, and virtual engagement has been a part of VTA's efforts for many years. The transit agency has used a variety of tools to collect public input on plans and initiatives, such as gathering feedback via online web mapping tools and hosting virtual meetings. While the COVID-19 pandemic accelerated VTA's virtual engagement efforts in terms of shifting standing in-person meetings to virtual meetings (VTA opted to transition their Board of Directors and public committee meetings to Zoom) and found turnout to be better or the same using the virtual meeting format. The agency found that virtual engagement was especially valuable to reaching people who would otherwise not be able to attend public meetings at the typical times — after 5:00 p.m. As a result, the agency started hosting optional virtual public meetings for planning projects midday and in the afternoon, and found it was able to attract participants who did not necessarily fit the mold of its typical in-person participant — often working-age male.

VTA also sought to abbreviate its large-scale planning meetings. Instead of long, information-heavy meetings covering a large geographic area, staff found they could be nimbler, and the information could be more relevant when they scheduled and hosted virtual or hybrid meetings covering specific communities.

One of the challenges many transit agencies face when conducting webinars or virtual meetings online is getting information about the people who are participating in the meeting. Often people log in using an alias or do not sign in using optional forms. By using the free service known as Eventbrite to publicize the meeting and collect RSVPs, staff said they have a better handle on who is participating, and they ask people to share basic demographic information which can also be helpful for Title VI reporting.

VTA defines its outreach success in terms of participation levels: the number of attendees at public meetings and the number of comments or survey respondents. Its engagement focuses on being equitable, inclusive, and focused on gathering a diversity of ideas. With a variety of languages spoken in the VTA service area, the agency's online feedback and survey tools are offered in languages other than English (typically Spanish, Vietnamese, or Chinese). Receiving completed comment forms and surveys in Spanish or Vietnamese, for example, gives agency staff confidence that they have done an effective job of reaching diverse populations.

- From VTA's staff's perspective, virtual meetings are easier to manage than in-person meetings: only one person can speak at a time, and people who are off topic or too verbose can be muted. People are more concise, and meetings finish on time.
- VTA has found that getting the word out about meetings seems to be easier for staff, since everyone is online more due to COVID-19.
- Staff recommends rehearsing in advance of a virtual meeting. VTA's engagement team typically leads three practice sessions in Zoom with any technical experts who will be presenting, and ensures that at least four members of staff are assigned responsibilities to host and manage the meeting.
- Staff recommend establishing criteria for when a "webinar" is best and when a "meeting" is best in Zoom.
- VTA staff expects they will be leading more hybrid engagement in the future as a way to be more inclusive of everyone's needs and preferences.

Software tools that VTA uses include Eventbrite, Poll Everywhere, Survey Monkey, Qualtrics, and mapping tools including Maptionnaire, Crowdspot, and Wikimaps.

Hopelink

Hopelink is a Community Action Agency and the mobility manager for King County, WA. They provide a variety of community services including transportation, including the direct provision of transportation services for eligible users as well as a Non-Emergency Medical Transportation (NEMT) Brokerage, for King and Snohomish counties. Staff say they are motivated by the fact the transportation is, to the average user, complicated and can feel daunting and overwhelming to certain more vulnerable populations. By engaging with communities and understanding their needs, they can support them and better understand the needs of the community.

Much of the organization's transportation work focuses on engaging with the community through organizing meetings and events hosted by any one of the five coalitions in which they participate. Pre-COVID-19, this meant booking venues at least three times a month throughout the region and inviting stakeholders get together at these rotating locations for collaboration. While some of the meetings offered a call-in option, not all did. Impacted by COVID-19, Hopelink switched all engagement to virtual programming, mostly using Zoom meetings. Before settling on Zoom, staff formed a taskforce, tested various virtual meeting software, and settled on Zoom because they found it easiest to use. The taskforce enabled them to conduct research, create an external-facing Zoom guide and develop internal best practices that identify necessary Zoom settings for all meetings. When facilitating meetings, they appoint a technology staff-support to manage chat, security features, and admitting attendees for large meetings. They schedule and conduct a meeting rehearsal when planning a large event or introducing new presenters or features.

In addition to regular engagement though coalition meetings, staff engages directly with the community through its Mobility Education and Outreach program.

Prior to the pandemic, the agency led trips on the bus to help immigrants navigate transit, tabling at community resource fairs, and hosting trainings for other community-based organizations. COVID-19 resulted in the agency shifting to virtual engagement using a variety of tools. For example, instead of bus fieldtrips for the Seattle Department of Transportation, the agency created a series of film tutorials showing people how to stay safe and ride the bus and used these in virtual training programs.

One of the major concerns staff has about virtual engagement is that they are missing a significant subset of the population, especially older adults who can no longer participate in congregant meal programs and those who do not speak English. Staff members are also concerned that virtual engagement alone limits their interaction with lower-income individuals. The agency served 6,500 clients in 2019, but only a small fraction of that number in 2020.

- Hopelink has found Metimeter's survey/polling tool to be useful and accessible for interactions with community members.
- Hopelink has found that breakout rooms during Zoom meeting have been helpful for ensuring people attend a meeting in the language they understand. With interpreters speaking Ukrainian or Dari assigned to specific breakout rooms, meeting participants speaking these languages were assigned to the appropriate rooms for an in-language interpreted meeting.
- Mailings and newsletter postings are effective tools to further support clients when all the meetings and events are virtual.
- Ensuring accessibility when ASL interpreters have been requested has been challenging.
- Hopelink is in the process of updating its Inclusive Planning Toolkit to include virtual engagement information.

Center for Pan Asian Community Services (CPACS)

The Center for Pan Asian Community Services (CPACS) is an Asian and Pacific Islanders health and human services agency that primarily serves to immigrant, refugee, and low-income families in Georgia. The agency offers two types of transportation services, the Express Bus service, which is an affordable employment bus service, and CPACS-Mobility, which is a shuttle service for older adults with limited English proficiency, disabled persons 19 years and older, and transportation disadvantaged individuals. Transportation is but one of several CPACS service offerings, which also includes education, youth, research, advocacy, as well as legal and immigration services.

CPACS's outreach and engagement is primarily geared toward refugee and immigrant communities, and thus, their outreach approaches tend to be somewhat atypical — going beyond the standard requirements. While they still employ more traditional outreach methods, there is also a reliance on more informal outreach, often driven by the transportation service operators who act as liaisons between the community and the agency — sharing news, updates, and programs to networks of family and friends. CPACS staff says that because service operators are from these communities and frequently interact with community members, they have a more "intimidate idea" (Yawn & Lee, 2021) of community needs and concerns.

For CPACS, COVID-19 has exacerbated barriers in the engagement process. Prior to the pandemic, challenges largely pertained to differences in language (connecting to different language groups and accurately interpreting technical jargon) and cultural norms (e.g., introducing and encouraging participation in forums such as steering committees, which are often more formal and corporate in structure). The shift to virtual technology during the pandemic created an additional barrier to participation as many of the old adults they serve do not heavily

Learn More

Pages	Helpful Resources
59	Effective virtual meetings

Learn More

Pages	Helpful Resources
52	Pre-recorded presentations

rely on technology in their daily lives, and thus, are less likely to participate in a virtual engagement process. As a result, CPACS has had to be incredibly flexibly in its outreach and engagement practice. For instance, to recruit community members for an ongoing initiative with the Atlanta Regional Commission and Mobility for All, staff members called individuals with the help of translation services and went to a weekend flea market to ask questions and conduct interviews. Staff say that this experience has challenged the more traditional, perhaps more westernized, aspects of public engagement in transportation planning, and noted that they, "must be flexible with the approach and meet people where they are," (Yawn & Lee, 2021).

Yolobus and Unitrans

Yolobus is a transit agency that operates in Yolo County, California, west of Sacramento County. The service area is mostly rural, with local circulation in several small cities. The City of Davis, within the Yolobus service area, has its own transit system, Unitrans, funded jointly by the University of California, Davis and the City. Both Yolobus and Unitrans had limited virtual public engagement prior to the pandemic, and both relied on in-person surveys and standing advisory groups/committees for ongoing feedback about their services. When the pandemic hit, both agencies pivoted to virtual engagement and offer examples of successes and challenges for transit systems.

Unitrans

The Unitrans Advisory Committee is a nine-member advisory body to the Davis City Council and includes appointed members. While these meetings had always been held in person, during the COVID-19 pandemic, they switched to virtual meetings using Zoom. The transit agency found that members of the public who rarely attended the in-person meetings were much more likely to participate in the virtual meetings (it also found it had better participation by its committee members when meetings were virtual).

Unitrans conducted a virtual open house to share information about and gather feedback on service changes necessitated by the COVID-19 pandemic. Staff organized the event to take place during a three-hour block of time using virtual meeting software and offered to move participants into individual breakout rooms to consult with technical staff. To publicize the meeting, they put information posters (door tags) on the buses and erected signs at the terminal, but with ridership a small fraction of their regular ridership, they had very few participants in the open house — much lower than their experience with similar in-person events.

The pandemic resulted in Unitrans using QR codes for sharing a range of information with the public: where to buy tickets, how to join meetings, etc. Staff have found this has been an easy feature that people understand.

Yolobus

Like Unitrans, Yolobus convenes a Citizens Advisory Committee (CAC), which includes representatives from different parts of their service area, and a Technical Advisory Committee (TAC) comprised mostly of public works staff from member jurisdictions. Yolobus uses its website and social media avenues as ways to promote and encourage participation among a diverse set of participants, and to establish the meetings as a forum for discussions about transit. The CAC and TAC began meeting virtually as a result of COVID-19, and Yolobus staff indicated the transition to virtual meetings was relatively successful.

Before COVID-19, Yolobus was engaged in the development of a comprehensive operations analysis and plan. Staff had previously conducted workshops in person, but wanted to hold another workshop to share information about recommendations. Yolobus decided to conduct a prerecorded virtual workshop instead of a live webinar or in-person meeting to update the public about the operations analysis and to give an overview of recommendations. Through these workshops, technical staff made presentations and encouraged participants to provide feedback using an online form. Staff had considered conducting virtual live workshops but decided that the recorded workshop approach would offer greater flexibility, allowing participants to join the workshop at their own leisure and that the organization would benefit from getting feedback via the survey form.

Yolobus has had many engagement successes in the past, especially when the organization relied heavily on in-person surveys to share information and gather feedback from consumers. As it transitioned its engagement to a virtual format, Yolobus also transitioned its surveys to an online format. Staff found it worked well for some populations, but not for others. For example, a large proportion of the population in the service areas speaks Spanish, so in developing an online survey, they placed survey cards on the buses with a link and QR code to a Spanish language survey. They also posted bilingual notices that if people did not have access to a computer, they could call a phone number and speak with staff to complete the survey. They even tried to incentivize participation by offering a chance to win one of several $50 gift cards. Interns went to the bus stops and put up notifications about the survey, which they promoted heavily. Unfortunately, they found that very few Spanish speakers completed the online survey. Staff attribute much of this challenge to the fact that many of the Spanish speakers in the service area do not have easy access to communication tools or the Internet.

A board representative expressed a concern about the low participation of Spanish language participants and suggested that it would be valuable to engage community partners, including a local supermarket that serves mostly Spanish-speaking residents. Staff took this advice and other suggestions from their survey to assess how they could improve the level of engagement across all population groups for a follow-up survey but admit it has been challenging for their small agency to easily overcome the digital divide. In the cities and rural communities of the transit agency's service area, the agency is on a learning curve to engage all populations — especially non-English speakers and low income communities — using only virtual tools.

Even with these challenges, staff is optimistic. They talked about the value of people's participation and emphasized that paying people for their time to participate in activities is fair and appropriate. They also emphasized that it is important to try to reach people where they are — an element of meaningful public engagement, but one that has challenged numerous transportation organizations when they must focus on exclusively virtual engagement.

Eau Claire Transit

Eau Claire Transit serves the cities of Eau Claire and Atloona, Wisconsin, and operates 15 regular fixed routes, six days a week, with an annual ridership of 850,000, many of whom are University of Wisconsin students. The City of Eau Claire also provides door-to-door paratransit service contracted to, and operated by, Abby Vans with an annual ridership of 50,000.

Like many other transit agencies, before the pandemic, Eau Claire Transit employed a hybrid approach to outreach, using both online and offline tools to encourage participation in engagement activities. For instance, it connected with community members online through social media websites, such as Facebook, and sent email blasts to stakeholders and partners. Offline, it purchased radio packages to make announcements, and posted public notices in the newspaper, at transit centers and on buses. While its outreach approaches engaged both online and offline communities, its engagement practices heavily relied on face-to-face interaction, including on-board surveys and in-person meetings, like monthly Transit Commission meetings, public hearings, and open houses.

In 2020, when developing its Transit Development Plan, given the pandemic, Eau Claire Transit could no longer depend on in-person approaches to connect with its riders. When conducting outreach for the Plan's public participation opportunities, the agency continued to share information through its regular online and offline channels, but realized that because of the decrease in ridership, fewer members of the public were privy to the information being shared offline (e.g., on buses and at the transit center).

For engagement, however, with the help of a consultant, the agency switched gears to host two virtual open houses and sought input through Wiki-maps. Despite the setback in offline outreach, after transitioning its open house event to a WebEx webinar, a similar number of individuals participated in the online meeting as in regular in-person meetings. Staff noted that these were the same individuals who typically attend transit meetings, and who have a genuine interest in the agency's activities.

In this case, the challenge was not in maintaining relationships with participants with long-standing interest in the agency's work, since these individuals tend to be more inclined to seek out such events regardless of format. Instead, the challenge posed by the switch to virtual engagement was to engage and solicit feedback from regular riders who do not usually attend scheduled in-person events and who would have normally been reached by chance, in the streets or on a bus, through a less structured and less time-consuming approach, like an in-person onboard survey.

From this case study, a few questions come to mind, including:

- How can an agency recreate the spontaneity, convenience, and brevity of an in-person encounter online?
- How can an agency increase interest among regular riders' who do not typically participate in activities, whether online or offline?

Tompkins Consolidated Area Transit

Tompkins Consolidated Area Transit (TCAT) serves the Ithaca urbanized area and a large rural area of Tompkins County in Upstate New York. Before the coronavirus pandemic in 2020, TCAT had an annual ridership of 4.2 million, with a fleet of 55 buses running on 34 routes, seven days a week. Since the pandemic, annual ridership has fallen to 1.4 million.

TCAT produced a Transit Development Plan in 2009 that was informed by feedback gathered at in-person community meetings held throughout the county. Staff noted that this type of face-to-face engagement was valuable to them because it indicated the agency's interest in community members and their feedback. However, given the rural nature of the service area, which includes low density, relatively remote communities, it was difficult to ensure that residents were always aware of upcoming engagements and that the events were convenient enough for them to attend.

In 2020, in the midst of preparing their most recent Transit Development Plan and while coordinating the community engagement efforts to inform it, the coronavirus pandemic hit and ushered in a change to a more virtual approach to connect with communities. As engagement activities were primarily scheduled for Fall 2020, several months after the start of the pandemic, staff faced an additional challenge of navigating "Zoom fatigue," i.e., the feeling of tiredness associated with the overuse of virtual meeting platforms like Zoom, which had already become ubiquitous. Despite much effort to increase interest among stakeholders, via methods such as posting on social media, engaging with community leaders, and publishing press releases, planned online events such as focus groups and office hours were still poorly attended.

The Ambassador Program proved to be one of two successful approaches for TCAT. The program, which was derived from an advisory committee recommendation, included six candidates who were hired part time to serve as liaisons between the agency and communities, particularly underrepresented communities, to increase their participation in the planning process. As community representatives, the ambassadors were familiar with community members and could, therefore, provide the best approaches to connecting with them. For instance, ambassadors suggested providing gift cards to every 10th person that filled out their survey and opted to call community members instead of sending emails.

The Ambassadors found that the approach was successful because the hourly rate was competitive and they explained that success would be lower if the engagement was strictly voluntary. The agency also made the application process fairly simple, without emphasis on qualifications, preferring to focus on individuals' interest in transit and their connection to their communities. It was important that candidates had good contacts and had given thought to and were familiar with transit issues within their communities.

While TCAT's Ambassador Program was conducted offline, following all required COVID-19 protocols, the concept can be used for online engagement as well. The basic premise being that when agencies partner with community members to understand group dynamics and barriers to participation, they can better engage stakeholders in a way that is considerate of and conducive to them, thereby increasing the chances of involvement and feedback. "You have to reach people personally with a simple message that allows them to know why the project is important to them. The people who can communicate that message often have direct connections to the community," (Yarrow, 2020).

Miami-Dade Transportation Planning Organization

The Miami-Dade Transportation Planning Organization (TPO) guides the transportation planning process in Miami-Dade County, Florida. A major role of the Miami-Dade TPO is to ensure conformance with federal regulations requiring that highways, mass transit, and other transportation facilities and services are properly developed and deployed in relation to the overall plan of urban development. Another major role is to approve plans for local, regional, and state transportation network accessibility. As the largest Metropolitan Planning Organization (MPO) in the state of Florida, the Miami-Dade TPO serves 2.9 million residents and has a 25-member Governing Board comprised of the 13 Miami-Dade County Board of County Commissioners, eight elected officials (one from each municipality with a population over 50,000 residents), four Governor appointees including: the Miami-Dade County School Board, a municipality-at-large (within Miami-Dade County), a non-elected official (residing in unincorporated Miami-Dade County), and the Miami-Dade Expressway Authority.

The Miami-Dade TPO is active in engaging the Miami-Dade County community in the transportation planning process. Before the pandemic, staff consistently went out into the community with their transportation partners to various organizations hosting transportation events and engaging with participants. The TPO has historically been involved with Miami-Dade County's Community Action and Human Services Department (CASHSD), which hosts community advisory committees (CAC) representing 16 different areas within the county. The CACs are effective entities to hear and learn from the heartbeat of the community and keep them involved with the transportation planning process, since community leaders are very active in their CACs. The Miami-Dade TPO has also partnered with the Miami-Dade Police Department's CACs to also keep them engaged. However, during the pandemic, CAC meetings were temporarily hosted virtually. The TPO coordinated with the CACs to attend available virtual meetings to provide transportation-related information to their members. The TPO has also collaborated with other community partners, such as the library system, to communicate important information to the general public.

In lieu of in-person events, the Miami-Dade TPO began hosting a fast-paced, virtual lunch series in 2020 titled "Taste of Transportation." The series consisted of seven virtual outreach events (VOEs), one for each of the transportation planning areas (TPAs) of Miami-Dade County as identified by the TPO's 2045 Long Range Transportation Plan (LRTP). The TPO administered each VOE with Host Chance, the TPO Master Chef, and the main Chefs from each transportation partner agency. To keep it lite and engaging for the audience (Taste Testers), all presenters provided quick, 3-minute updates regarding their transportation-related activities within the respective TPA. The TPO developed flyers that were distributed through virtual e-blasts, social media channels, and weekly e-newsletters to residents and community members and partners. The TPO posted the recordings, with tailored opening and closing sequences, to the agency's YouTube channel and promoted through social media and the weekly newsletter. The TPO found great success in this VOE series, because it combines entertainment with education regarding current local transportation activities and events.

The Miami-Dade TPO has historically emphasized the importance of networking with partner/sister agencies and community organizations. Whether it is for the purpose of technical assistance or just to form a new relationship, there is so much that can be accomplished through strong partnerships and pooled resources. The TPO also highlights the value of collaborating with the local library system and community groups, such as the Miami-Dade County CASHD and Miami-Dade Police Departments' CACs, to explore new ways to keep the general public engaged. Building relationships with new entities, and the people within them, cannot be overlooked in the engagement process!

Kanawha Valley Regional Transportation Authority

The Kanawha Valley Transportation Authority (KRT) is the largest transit authority in West Virginia, serving Kanawha County and portions of Fayette and Putnam Counties. The service area is approximately 913 square miles, with a population of approximately 193,063. KRT's annual ridership is usually around eight million, though it is down 40 percent due to the COVID-19 pandemic.

KRT explained that their ridership is one of necessity – not choice. There are many affordable parking options offered throughout the town and approximately 88 percent of the public live with .75 miles of a bus route. Additionally, KRT is not currently conducting any major transit initiatives or changes that would necessitate public input. As such,their community is not very engaged on transportation issues and do not require many forums for engagement.

KRT has found success in virtual public engagement through Facebook, Twitter, and their KRT Live app, which provide real-time transit updates to the public. KRT uses these communication channels to relay updates on service disruptions, bus route changes, and closures. KRT also uses social media to deliver updates on what the Authority is doing within the community, with partnerships and events in which they are participating. KRT's Facebook page and website offer the opportunity to provide public comment and questions, and is monitored regularly by KRT staff. Members of the public can also provide comments and feedback during the monthly, virtual public board meeting. KRT has received public input and engagement from all sources, ranging from general questions about route schedules to requests for service changes to suit their needs.

City of Asheville Transportation Department/ Transit Division

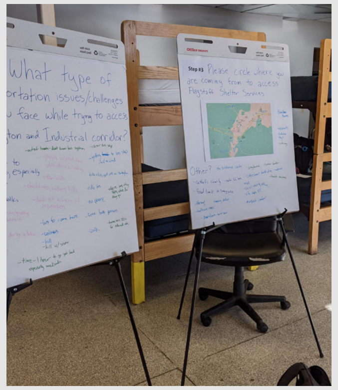
The City of Asheville, which manages Asheville Rides Transit (ART), oversees transit operations for 19 fixed-routes that travel within the different communities of the City of Asheville and its surrounding counties. In fiscal year (FY) 2019, ART completed nearly 2 million rides and in FY 2020, 1.5 million rides were completed. ART has 50 employees that support the City's Transit Planning staff for transit short-term and long-term planning activities, development and implementation of transit service improvements, scheduling, service delivery, bus stop planning and improvements. The Transit Division is one of four divisions in the Transportation Department. The other three divisions include Traffic Engineering, Transportation Planning and Parking Services.

As with many entities and at the start of the COVID-19 pandemic, the City of Asheville faced some initial hurdles in transitioning to a virtual environment. The City conducted an extensive assessment of current virtual engagement platforms to determine which platforms best met the needs of the various City of Asheville departments for internal coordination, as well as external coordination and public engagement. During this assessment, the City's project manager met with multiple engagement platform vendors to receive a formal demonstration of the platform and learn how it could be adapted to the needs of department-specific needs.

Following their platform assessment, the City confirmed that they would employ PublicInput.com for external-facing and public outreach meetings, as well as City of Asheville Council meetings and use Google Meet for internal coordination meetings; the Transit Division including other city department staff has found great success in deploying both platforms to meet their regular meeting needs. In reflecting on the assessment process, the Transit Division noted the helpfulness of having one staff member manage this process. They explained that this staff was able to fully devote their time and attention to the initiative and organize the participation of additional staff members through training, and have staff in various departments/divisions to manage meetings with external groups.

There were several recurring meetings that the Transit Division had to transition to virtual platforms, including meetings with the Transit Committee and Better Buses Together, where the Transit Planning Division staff would regularly make presentations to provide updates on current and upcoming transit initiatives and service changes. To disseminate virtual engagement capacity across the City of Asheville, mandatory training was conducted for designated staff in various departments including the Transit division and included training provided by the internal IT department on using related IT tools on the virtual platforms being employed. As additional staff were trained and became more familiar and comfortable participating in virtual meetings, other Citywide Commission and Board meetings were held. The Transit Planning Division staff emphasized that the ability to meet virtually has taken on increasingly important significance in ensuring that staff are able to communicate with one another and continue providing essential services to the community.

Since the start of the COVID-19 pandemic, the Transit Planning Division staff has begun virtually meeting regularly with several community organizations, including the Rotary Club of Asheville; Better Buses Together, which is a community group that advocates to improve transit and rider experiences; and the Multimodal Transportation Commission, which is citizen-led transportation commission that assists the City of Asheville in advancing and promoting a comprehensive and integrative transportation system. The department's ability to meet regularly with these groups helps to educate community members on current initiatives and ensure that public voices and ideas are captured in the transit policy conversation.



NAIPTA's in-person socially distanced outreach at a shelter.

Northern Arizona Intergovernmental Public Transportation Authority (NAIPTA)

The Northern Arizona Intergovernmental Public Transportation Authority (NAIPTA) is the transit agency that operates the Mountain Line, Mountain Lift and Mountain Link systems in Flagstaff, Arizona, serving providing more than 2,440,000 annual trips. In addition to providing transit and shuttle services, NAIPTA also manages a van program and provides travel training services, among other programs. A relatively small agency, the planning department has a staff of four who are charged with engaging the public and there is also a marketing and communications manager. Most major initiatives have an engagement budget of between $2,000 and $10,000, and the organization regularly develops, and updates lists of organizations they seek to partner with because it helps to make their outreach more effective.

Like many other transit systems, the COVID-19 pandemic changed the way NAIPTA conducted meetings and also impacted their public engagement efforts. For example, NAIPTA staff regularly participated in in-person statewide coordination meetings with other mobility managers, and these shifted to virtual meetings. Likewise, their quarterly Coordinated Mobility Council meetings pivoted to virtual. NAIPTA opted to use Zoom meeting software for all virtual meetings and found it worked well: they made use of built-in polling and breakout rooms to give more people an opportunity to be heard. Where some older adults and people with disabilities have indicated they are unfamiliar with the platform, staff led some "test calls" to familiarize them with the tools.

The Transit Advisory Commission and Board of Directors meetings shifted to virtual, and the organization livestreams them to YouTube for members of the public to observe. By livestreaming, the agency is able to broadcast meetings more widely, but it also means that members of the public who wish to provide a comment must contact NAIPTA in advance to request a link to the live meeting.

NAIPTA began the process of redesigning its downtown transfer center prior to the pandemic. As part of the redesign process, it formed a community stakeholder group in the Southside Neighborhood. Although the meetings had originally been planned as in-person events, they were carried out via Zoom.

Tactics used to encourage people to participate during the pandemic were essentially the same as prior: staff worked with the neighborhood association, which had been a solid liaison, to get the word out and also relied on their dispatchers to inform paratransit users of opportunities to participate. With meetings having moved to Zoom, that agency found that not everyone who wanted to participate was able to. To help bridge the digital divide, Mountain Line staff brought a computer to the transit center for individuals who would otherwise not be able to join the online meeting.

NAIPTA has found other examples where virtual engagement does not work effectively for all populations. For outreach to very low-income residents, including some who are unhoused, staff opted to offer socially distanced "COVID-safe" engagement outside of a shelter and food bank. Masked and with hand sanitizer, staff used large notepads to collect information from consumers about their trip origins, destinations, and peak travel hours, acknowledging, "there's no computer access or way to meet these people otherwise" and staff found it to be successful.

Boulder County Mobility for All

Colorado's Boulder County Mobility for All (M4A) Program promotes accessible, affordable, and equitable multi-modal transportation options for residents of all backgrounds. These efforts have historically included public outreach and education on multimodal transportation options, as well as assistance funds for accessing local transit services. This focus is based on the understanding that reducing the transportation cost burden is a critical step on the path to self-sufficiency

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and accessing health and human services. M4A's projects are all focused on improving access to affordable transportation and empowering residents through community outreach and education.

M4A's Technology Ambassador Program launched in 2020 to leverage community partners and volunteer power to offer transportation-related technology workshops to help community members of all ages and abilities feel more comfortable using transportation apps, including the region's public transit and mobile ticketing apps, Google Maps, and rideshare apps Uber and Lyft. Training and educational events are posted on the program's Eventbrite page.

The M4A YouTube includes short, bi-lingual tutorials as well as in-depth workshops, including:

- Using Lyft Demonstration Workshop
- How to use RTD Mobile Tickets | Cómo usar RTD Mobile Tickets
- M4A Technology Workshop Using Google Maps App

By migrating this ambassador training program to a virtual environment, M4A has overcome unique challenges of engaging constituents online who have limited technology proficiency, including the elderly, ESL riders, and people with intellectual disabilities. M4A is delivering these training sessions on YouTube, but staff are also innovating on how the agency provides real-time and asynchronous support. Through the program, community members can be matched with a volunteer "ambassador" if they need additional assistance accessing a specific mode of transportation using smartphone apps. Ambassadors also assist older adults and people with disabilities in a series of activities designed to help expand access and use of technology-based transportation options.

As the Program's manager Angel Bond put it, "behavior changes come easier socially." That is why M4A emphasizes not just offering a tutorial, but also facilitating a dialogue that builds trust and improves understanding.

Neighbor Network of Northern Nevada (N4)

The Neighbor Network of Northern Nevada (N4), a Federal Transition Administration grant recipient, was established in 2015 to design and deliver innovative transportation solutions related to health care access. Today, N4 receives local, state, and federal funding to further develop innovative projects and programs with its "village" approach that connects people living in Northern Nevada for inclusive, community-based services, volunteer opportunities, and affordable transportation.

Before the COVID-19 pandemic, N4 had planned for an in-person summit to advance its mission to connect people with disabilities and older adults-in-home with community-focused services. The regional MPO wanted to convene at-home caregivers to share the resources available to them to support better health and well-being for both the caregiver and the person receiving care. This included respite services for family care partners, companion services, personal care, social, recreational and educational activities, and access to affordable supplemental transportation and discounts on Lyft rides.

When local Shelter-in-Place orders made an in-person summit untenable, N4 migrated to two half-day virtual summits on Zoom. What surprised their staff was that attendance exceeded their expectations for the in-person summit. For at-home caregivers an opportunity to connect with others doing similar work without the need to leave their loved one for an extended period was exactly what they needed. N4 also had success with maintaining the collaborative feel of a summit. Breakout rooms with N4 staff and volunteer facilitators provided a venue for the caregivers to speak in smaller groups about their experiences, lessons learned, and where they would benefit from additional support. Ultimately, the summit built momentum for future gatherings because the virtual environment made it easier for at-home caregivers across

Learn More

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an expansive geographic territory to connect, providing a critical link for individuals who are all too often isolated and may not know where to turn for community support.

The lesson? Context is critical. In some cases, the audience may prefer and benefit from a virtual environment.

Templates

Agenda (External Document)

COMPANY LOGO

Meeting Name
Meeting Date
Meeting Time
Webinar Link

Meeting Objectives:

1. Provide update....
2. Discuss benefits and concerns...
3. Obtain feedback...

Time	Topic	Presenter(s)
6:00 PM	**Welcome & Introductions**	Presenter(s) Name, Affiliation
6:10 PM	**Topic 1** • Subtopic • Subtopic	Presenter(s) Name, Affiliation
6:40 PM	**Topic 2** • Subtopic • Subtopic	Presenter(s) Name, Affiliation
7:10 PM	**Topic 3** • Subtopic • Subtopic	Presenter(s) Name, Affiliation
7:30 PM	Adjourn	

1. Add the webinar link to the top of the agenda for easier access.
2. Outline the meeting's objectives for stakeholders to understand the meeting's purpose.
3. Provide a high-level overview of the meeting's activities with an estimated start time.

Meeting Support Plan (Internal Document)

Meeting Name
Meeting Date
Meeting Time
Webinar Link

Meeting Objectives:

1. Provide update....
2. Discuss benefits and concerns...
3. Obtain feedback...

Time	Topic	Responsible Staff
Day(s) before webinar	**Webinar Set Up** Mute participants on entry but allow them to unmute themselves as needed. • Ensure panelists can share screens. • Ensure the chat function is working. • Recording settings are correct. • Select the video recording screen only shows the presentation and not participant videos.	Webinar Manager & Support

1. Add the webinar link to the top of the agenda for easier access.
2. Outline the meeting's objectives for stakeholders to understand the meeting's purpose.
3. Create an annotated agenda. Add important notes and helpful links.

5:00 PM	**Webinar Set Up & Testing** • Start webinar at 5:00 PM. • Webinar facilitator should ensure all documents are queued and begin sharing the meeting's agenda. • Webinar manager should ensure all webinar settings (chat, microphone, etc.) are correct and all participants are muted on entry. • Remind project team members to dial in/dial out via phone and connect to the webinar via the computer. Click the down arrow beside the mute button, select "Switch Audio" and choose dial out/dial in option. • Project team will log on at 5:30 PM to welcome participants in the room.	

5:30 PM	**Webinar Set Up & Testing**
	• Welcome Participants (pre-webinar)
	• The Facilitator will welcome webinar participants as they log on. Note the following:
	  • Participates are muted and can unmute themselves when needed. If you dial-in via phone, make sure to unmute both the phone line and webinar.
	  • We encourage participants to ask questions/share comments via chat.
	  • Captions are available. To turn captions on/off select the icon on the bottom left corner of the window.
	• Webinar support should share the welcome message in the chat.	

4 The Webinar Manager, Facilitator and Support person should join the webinar before the start of the meeting to test the webinar. The rest of the team should join 30 minutes before the call to test their line.

5 Some participants can join the call early. Make sure to invite them in and note the meeting setting and functions.

6:00 PM	**Welcome & Introductions** • Round-table introduction of the entire project team. • Review agenda, meeting objectives, and ground rules.	
6:10 PM	**Topic 1** • Subtopic • Subtopic	
6:40 PM	**Topic 2** • Subtopic • Subtopic	
7:10 PM	**Topic 3** • Subtopic • Subtopic	
Adjourn	**Adjourn**	

Staff Contact Information

Name	Email Address	Phone	Role	Alternate

Staff Roles & Responsibilities

Webinar Manager: Jane Doe
Responsibilities:
- Manage webinar platform
- Manage participants (mute/unmute)
- Troubleshoot technical issues

Webinar Facilitator
Responsibilities:
- Share screen
- Facilitate discussion

6 Note staff contact information to ensure that they can be easily contacted before and/or during the call.

7 Provide information on roles and ways of navigating the webinar platform.

Webinar Support
Responsibilities:
- Share links via chat
- Prepare meeting summary
- Assist with technical issues

Webinar Platform Instructions

How to:

- Share screen
- Mute/unmute participants
- Turn on/turn off participant videos
- Troubleshoot technical issues

Draft text for chat

- Welcome!
- How do I raise my hand?
- Ar you recording this webinar?
- Why am I on mute?
- Thanks for joining!
- More information

Important Links
- Website
- Comment page
- More information

Day of Meeting Checklist

Materials	Staff Responsible	Packed

8 Prepare short text to share with participants via the webinar's chat.

9 Use a checklist to ensure that all meeting materials are in a central folder/area for easy access.

NCATT Virtual Engagement Guidebook, 2021