CADR VIRTUAL PUBLIC MEETING NEEDS AND LESSONS LEARNED

Dialogue Synthesis and Recommendations Memo

Last Updated July 7, 2021

The Department of the Interior and the Bureau of Land Management Offices of Collaborative Action and Dispute Resolution contracted with Kearns & West to develop this memo.

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Introduction

Project Purpose

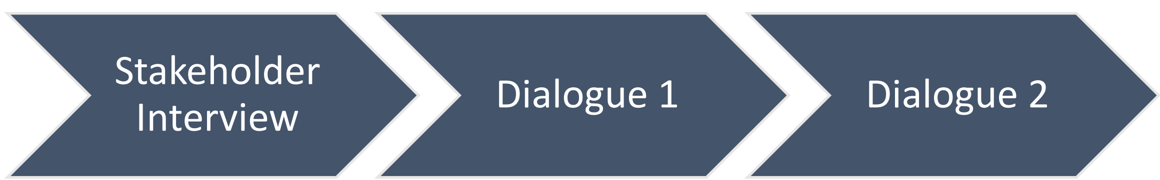
As virtual public meetings have become more common due to the Covid-19 pandemic, the Department of the Interior (DOI) and the Bureau of Land Management (BLM) are learning from internal and external practitioners about best practices and lessons learned from hosting virtual public meetings.

The DOI and BLM Offices of Collaborative Action and Dispute Resolution (CADR engaged Kearns & West to conduct a series of stakeholder interviews and dialogues focusing on best practices and lessons learned from conducting virtual public meetings for the DOI. While many aspects of conducting virtual meetings are administrative in function, the focus of the interviews and dialogues was on lessons learned and best practices.

From the interviews and dialogues, Kearns & West developed this Dialogue Synthesis and Recommendations Memo.

Approach

The Kearns & West team worked with the two CADR offices to identify participants for stakeholder interviews with DOI staff and consultants who had recently conducted virtual meetings in November-December 2020. After synthesizing information from the stakeholder interviews, the team facilitated larger group dialogues in March and April 2021 to review what was heard during the interviews and to identify additional findings and recommendations.



Stakeholder Interviews

The Kearns & West team conducted over 20 stakeholder interviews in November and December of 2020 with individuals and teams across the Bureau of Land Management (BLM) and the DOI who have conducted virtual public meetings. These interviews informed a subsequent series of dialogues on virtual public meetings across the DOI and federal agencies. The goal of the interviews was to identify key lessons learned and best practices in conducting virtual meetings. The stakeholder interview list was initially identified in consultation with DOI and BLM CADR. A list of participants can be found in ***Attachment A.***

Dialogues

Following the stakeholder interviews, the Kearns & West team facilitated two virtual dialogues to synthesize lessons learned and identify best practices and recommendations.

Dialogue 1 was hosted on March 16, 2021. Invitations were sent to stakeholder interview participants and other DOI staff who have participated in virtual public meetings. During Dialogue 1, chat and verbal dialogue were used for discussion and the tool Miro was used to brainstorm additional ideas. ***Attachment B*** includes a list of Dialogue 1 participants.

Materials for Dialogue 2 were updated to reflect input from Dialogue 1. Dialogue 2 was hosted on April 20, 2021 and included participants from the DOI External Collaboration and Conflict Resolution Network. The invitation was also sent to leadership and agencies across the federal government who have participated in leading virtual public meetings. The Kearns & West team presented key themes from the stakeholder interviews and used Miro as a brainstorming tool to identify ideas related to themes and new topics related to virtual public engagement. Chat and verbal dialogue were also included in the discussion. The list of participants for Dialogue 2 is included in ***Attachment B.***

The Stakeholder Approach and Dialogue Design Memo for the stakeholder interviews and Dialogue 1 and 2 can be found in ***Attachment C.***

Summary

Over the course of the stakeholder interviews and dialogues, participants identified and discussed topics categorized under the following key themes:

- Roles and Responsibilities
- Preparation
- Communication and Advertising
- Meeting Structure and Format
- Virtual Platform
- Accessibility
- Challenges*

**Note*: In this report, ideas under the challenges theme have been categorized into existing themes.

A synthesis of findings and best practices identified by stakeholders, as well as recommendations from Kearns & West are included in the following section.

Synthesis of Findings, Best Practices, and Recommendations

Overview

This section includes findings and best practices on themes identified through the stakeholder interviews and dialogues, followed by recommendations from Kearns & West. The themes discussed include roles and responsibilities, virtual meeting preparation, communication and advertising, meeting structure and format, virtual platform, and accessibility.

Each theme includes:

- A synthesis of the topic discussed in stakeholder interviews and during both dialogues;
- Best practices and findings identified by stakeholders and dialogue participants who have hosted virtual public meetings;
- Additional recommendations from Kearns & West.

Challenges and Opportunities

Throughout the course of the interviews and dialogues, participants discussed some of the nuances of conducting virtual meetings that are outside of the following categories. Discussion included the difficulty of building relationships and the often-challenging interpersonal dynamics present in virtual meetings. Visual or auditory cues during in-person meetings might be missing in a virtual setting.

It can also be challenging to recreate the casual opportunities for interaction with the public that might normally take place before and after an in-person meeting. While it might be difficult to hold participant engagement during a virtual meeting, the same message can get across to all participants.

Another nuance noted was the difference between “impacted” participants (those who are local to the project site) versus “interested” participants (those with an interest in the outcome). This was noted in terms of meeting participation. Local representation might be missing in virtual meetings, whereas the potential is greater for representation of visitor/ environmental/ interest groups, which may be missing at in-person meetings.

While virtual meetings were necessary during the Covid-19 pandemic, some participants explored if future meetings should be primarily virtual for regional dialogues with in-person meetings reserved for local projects.

Findings, Best Practices, and Recommendations

Roles and Responsibilities

Defining roles was noted as a factor of success, especially as an overlap in roles (or responsible parties not being identified) can lead to “too many cooks in the kitchen.” The title and name for roles varied across agencies and project types, but essential roles included facilitator, host, presenter, tech support, and subject matter experts (SMEs). Based on project complexity and outcomes, project team roles can also include co-hosts, closed-captioning, court reporter, and notetaker. Importantly, conducting an analysis of staff availability and capacity early on will help determine roles. This includes the bandwidth/hardware capacity of technology available to staff, as well as their existing knowledge and capacity to learn new tools and meet project needs.

Findings and Best Practices

- **Identify an experienced platform user as the host** and create opportunities for the co-host and project team to learn the platform.
- Roles can be identified through an **evaluation of level of effort** for the public meeting. Identify specific people to fill roles with backup options.

Kearns & West Recommendations

- **Calibrate Meeting Structure by Staff Capacity and Fit:** There are times where the project team capacity does not match the needs for a virtual meeting. It’s important to be realistic about staff expertise and integrating a feedback loop into the project to calibrate the meeting structure based on team/staff dynamics.. Some team members may have hosted multiple virtual meetings and some may not. Do not wait to determine who should be involved in the process (or what technology should be used). Identify gaps in project roles upfront and then adjust. On a similar note, there might be projects where staff have capacity and experience levels to fill more than one role during a virtual meeting. Maintaining flexibility for roles on a project-by-project basis will help lead to success.
- **Engage Leadership Early.** This will help confirm expectations and availability for the virtual meeting and set up the project team for success. A touchpoint with leadership, at whatever level is necessary for the project, should take place in the first phase of the facilitation plan and after technology considerations have evolved. For large events, identify upfront how leadership should engage in politically charged or sensitive conversations.

Preparation

Stakeholder interview and dialogue participants discussed several preparation factors that can lead to a successful virtual public meeting. Participants noted the amount of lead time depended on project complexity, oversight, and the experience of the project team. The need for dry runs was highlighted, with notes on timing, frequency, and who should participate. Another important aspect is documentation, including facilitation plans, meeting plans, and communications plans. Advertising for the public meeting is also a key aspect of preparation, often noted as a shared responsibility between federal agencies and external partners.

Findings and Best Practices

- Although the **lead time** identified for virtual meetings could vary, participants identified 1 month to 6 months for preparation.
- **Dry runs** with the full team are ideal. Include leadership on projects that could be high-conflict or have decisions from leadership either regionally or nationally.
- For **documentation**, develop facilitation or virtual meeting plans with technology instructions and talking points.
- Prepared materials could include a project fact sheet, frequently asked questions, and other topic areas.

Kearns & West Recommendations

- **Lead Time:** Preparation should begin at least 6 weeks before any virtual public meeting. This allows time to identify meeting objectives, the agenda, communications plan, facilitation plan, accessibility needs, and for advertising, review time, and dry runs. More complex projects might require more than 6 weeks.
- **Facilitation Plan:** The facilitation plan should include an annotated tech agenda that combines facilitation with technology instructions. This could include timing, presenters, talking points, slide numbers, and polls, and should factor in roles and responsibilities.
- **508 Compliance:** Identify 508 compliance needs early and plan for how to integrate 508 compliance and related costs.
- **Dry Runs:** Dry runs should take place 1 week before the virtual meeting to identify gaps and needs. Dry runs should include everyone involved in the meeting. This includes facilitators, presenters, hosts, tech support, SMEs, and leadership, as needed per project.
- **Practice:** Part of the preparation process should be practicing and planning for politically charged or sensitive questions.

Communication and Advertising

Communicating to partners and the public about virtual meetings incorporates best practices from in-person meetings but requires additional coordination and opportunity for advertisement. Conversations in stakeholder interviews and dialogues included developing communication plans early in the process, coordinating advertising for both local and regional/national audiences, developing companion websites to support project messaging, and partnering with existing communities to get the word out.

Findings and Best Practices

- All communication needed for the virtual meeting should be developed at least 4 weeks before the meeting date.
- **Communications plans** developed should include information to send to stakeholder groups, media, and interested parties.

- **Companion websites**, like project pages, storyboards, and others, can help elevate the project and continue engagement after the virtual meeting ends.
- Use **diverse types of media**, like newsletters, flyers, and postcards with QR codes to advertise the meeting.
- Identify whether **radio announcements** in rural areas will share localized meeting information.
- For national reach, **use social media** and blogs to advertise to the target audience.

Kearns & West Recommendations

- **Advertising:** For virtual meetings, advertising needs might change to reflect a virtual audience. For projects that will impact a local community, identify how communities and stakeholders access information.
- **Community Groups:** Partner with existing community groups to get the word out about virtual public meetings for projects that will impact a local community.

Meeting Structure and Format

While the content and structure of virtual public meetings will differ among projects, locations, and agencies, participants discussed key items to consider for meeting structure and format. Participants recommended redundancy in roles, technology, and materials. Comments on the appropriateness of pre-recording presentations included discussion about reducing presenter stress while potentially reducing personal interaction in the virtual space. The need to identify ground rules during the meeting was noted, with built-in flexibility when participation differs from what is anticipated.

Findings and Best Practices

- **Identify a backup** facilitator, host, and presenter in case there are challenges like bandwidth issues or connectivity problems. Host meeting materials both on a desktop and in the cloud in case of technological issues. Identify contingency plans for platform issues**.**
- **Record presentations beforehand** when the information can be shared at multiple meetings or is a message from leadership.
- During the agenda development, **objectives and opportunities to participate should be clearly identified**, along with timing expectations and level of participant interaction.
- **Identify ground rules**, but structure them to allow for flexibility if participant attendance, accessibility, or outcomes change during the virtual public meeting.
- **Include participant location during registration** or add a poll question indicating general location during the meeting to identify who is in attendance. Staff can identify whether location-specific meetings need to take place based on registration or interest.
- Build intermission and breaks into longer meetings. **Different presenters and voices** also help elevate partners and create interest for participants.
- **Stakeholder engagement sessions** before a public meeting can help identify key issues and who should be participating in the public meeting, frame the presentation, and prepare the team for potential questions.
- **Integrate polls and informal check-ins throughout** the presentation to gauge participant engagement and personalize the virtual meetings. While there might be limitations on the number of questions asked, fun and informal polls can help humanize a virtual meeting and build relationships between participants and the project team.

Kearns & West Recommendations

- **Start Early:** Join the meeting early and walk through the audio and video for all project team members. Designate hosts and co-hosts. Share the presentation and opening slide. Adjust virtual meeting settings before participants join.
- **Tech Support Messages:** Develop chat messages before the meeting to be copied and pasted into the chat throughout the meeting. This could include tech support instructions, important links, and project information. Align chat messages with verbal instructions and provide tech instructions frequently. Tech support can also rename project team members to include their role (e.g., Tech Support, Facilitator). Designate a tech support role for muting and unmuting participants, as well as turning off inappropriate participant video if a video platform is chosen.
- **Choose the Right Tools:** It is not necessary to use technology for technology's sake. Use technology and tools only when they are useful.

> ***Additional Recommendation:*** *DOI or CADR could develop a common webinar/public meeting template for practitioners to use. This template could include questions to ask of project leadership, what roles are needed for the project, a facilitation plan, and common virtual platform tools and options.*

Virtual Platform

A variety of virtual platforms are employed for virtual public meetings, each with different options and requirements that are administrative in nature. During the stakeholder interviews and dialogues, discussion centered on how to choose a virtual platform, identifying the need for secondary communication tools/platforms, and what tools and techniques can be incorporated to facilitate engagement. Inconsistent licenses and configurations within and across agencies were noted, with a need for flexibility and training. Technological challenges need to be addressed upfront, with contingency plans in place. Participants commented that notes on regulatory procedures, like for public testimony, posed challenges with virtual meetings. In terms of the Freedom of Information Act **(FOIA)**, challenges arise in how to turn recordings into a system of records.

Findings and Best Practices

- Determine which virtual platform to use by **identifying the purpose of the meeting** (highly interactive versus presentation with Q&A) or through the level of comfort by presenters and facilitators.
- **Secondary communication tools** (like Teams) can help the project team communicate outside of the virtual platform.
- **Platform tools**, like mute/unmute, Q&A, and comment management are important features to identify before choosing a platform.
- When using the webinar format**, allow the attendees to see who is in the meeting/room**. Many people will not engage if they do not know who else is in the room.

Kearns & West Recommendations

- **Virtual Meeting Assessment:** Conduct a virtual meeting assessment at the outset of the project to identify project outcomes, the number of participants, desired participant interaction, regulatory inputs, and accessibility needs. This assessment will help identify what platform tools are needed and the level of effort required to host the public meeting.
- **Communicate Technological Information:** Incorporate platform instructions at the beginning of the presentation and send out instructions for participants before the meeting.
- **Prioritize Participant Experience:** Choose a platform that participants can easily access with few barriers to entry.

Accessibility

Identifying accessibility needs and adapting to address those needs beforehand is a key element of conducting accessible virtual public meetings. Identifying targeted participants and interested parties can also help identify additional accessibility practices alongside Americans with Disabilities Act (ADA) requirements. Participation in communities without internet access is difficult; phone-only users often do not have the same tools as those who can view the presentation through a virtual meeting (e.g., webinar).

Findings and Best Practices

- **Send hardcopies** of the presentation beforehand to people without internet access. Stream on social media and use radio broadcasts in rural/ tribal communities as identified by the project evaluation.
- **Select technology or engagement options that are "right sized" for stakeholder audiences.** Different audiences have different technology and participation dynamics, and planning teams should consider equity in access. For example, national non-government organizations can access technology and participate differently than local ranchers. Although accessibility might not be solved completely, it is important to be aware of tradeoffs when managing a process and identify facilitation approaches to best address those tradeoffs.
- **Accommodate phone participants** by including a call-in number for phone-only users, having the facilitator verbally identify the slide numbers, and making space for phone-only users to respond with verbal comments. Rename phone participants with their actual names and make sure they have opportunities to engage.
- The presentation should be **508 Compliant**.
- **Identify early if translation services** are needed and build translation and interpretation needs into the presentation and platform configuration.
- **Hold a tech session** before and during a meeting/workshop to address technical issues.
- Host meetings at **different times and on different days**. This does not represent a significant cost and can potentially engage more people than a single meeting.
- **Acknowledge accessibility challenges in meeting design tradeoffs.** In recurring meetings and smaller groups, it was noted project managers were more comfortable with accessibility tradeoffs (e.g., how-to guides, support documentation, and tech checks) versus one-off meetings.

Kearns & West Recommendations

- **Acknowledge & Mitigate Barriers for Access:** Untested platforms, breakout rooms, and webinar-only responses create accessibility challenges.
- **Confirm Accessibility Requirements Early:** Requirements for accessibility could impact project team roles and the technology chosen for the engagement.

CADR VIRTUAL PUBLIC MEETING NEEDS AND LESSONS LEARNED

Attachment A

Stakeholder Interview Participants

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Attachment B

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