ENGAGED RESEARCH ONLINE WORKSHOPS

Facilitating engaged research and innovation through digital platforms

HOW TO GUIDE

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Acknowledgements

More information on the work of Campus Engage can be found at **www.campusengage.ie** or contact **kate.morris@iua.ie**

Introduction

The 2020 global pandemic, for many of us, began a period of rapid change. People have, out of necessity, been required to learn how to use digital platforms in order to interact with both their work colleagues and social groups. For numerous employees, daily video calls or remote meetings on platforms such as Zoom, Teams, VidYo or Webex have become the norm. This has transformed our ways of engaging which may, in time, have longer lasting implications for the events and activities we run in the future.

Many HEI researchers have continued to work with civil and public servants, civic society organisations, businesses, frontline practitioners and policymakers to address societal challenges. They have been attending or organising webinars during the pandemic and have been learning how to promote, organise, schedule and run these events using digital platforms.

This guide aims to capture some of that learning for those who are facilitating engaged research workshops. The guide explores:

- The advantages and disadvantages of using digital platforms for Engaged Research workshops;

- Some key issues for consideration in running an online Engaged Research workshop; and

- Some practical pointers for before, during and after your online Engaged Research workshop.

What is Engaged Research?

Engaged Research describes a wide range of rigorous research approaches and methodologies that share a common interest in collaborative engagement with the community and aim to improve, understand or investigate an issue of public interest or concern, including societal challenges. Engaged Research is advanced with community partners rather than for them. A great deal of Engaged Research literature refers to 'community' engagement. In this context, 'community' refers to a range of public research stakeholders, including public or professional service and product users, policy makers, civil and civic society organisations (CSOs) and actors.

Engaging Online

It should be stated that this guide is not suggesting that digital engagement is the same as face-to-face engagement with a group. While digital platforms provide a 'version' of the real world, they often strip an experience down to its essentials. It may even be that the digital tools themselves are shaping the activity. But if virtual meetings are likely to have a place from now on, we must consider how the structures and limitations of digital platforms can impact on how we encourage involvement.

Despite their increased use, it should not be assumed that everyone is at the same level with these platforms. While many people may have used digital platforms at some point during the pandemic, they may not have to use them regularly. When organising an engaged research workshop, therefore, we need to consider ways to support people who are not proficient on a platform, have issues with their accessibility, or are using them on their smartphone or tablet.

Running a Workshop

The basic requirements of running online workshops are similar to face-to-face ones. For example, we must:

- Set the tone and make sure that everyone is comfortable;

- Have clear expectations, outputs and intended outcomes;

- Have a start and finish time and a structure that will be followed;

- Have activities that are appropriate to the participants;

- Keep facilitating the process as best we can so that participants can contribute; and

- Follow up with participants after the workshop.

These new digital platforms have a number of advantages and disadvantages with regard to running workshops.

Advantages ➕

- Cheaper, easier to organise workshops
- More geographically dispersed participants
- Greater participation by people who would not otherwise be able to attend due to, for example, lack of transport or caring commitments
- An opportunity to participate on the same level as others
- The smooth integration of images, PowerPoint and video clips into platforms

Disadvantages ➖

- An inability to 'read the room'
- Digital distractions among participants
- Fewer opportunities to network informally on a one-on-one basis with participants
- The need for more preparatory work with each participant in advance in order to ensure that they can use the platform and that they know what to expect
- The inability for satisfying spontaneous interaction between participants
- Unequal participation due to slow broadband, old devices, low literacy, poor disability accessibility

Key Issues

Once we accept that interactions on a digital platform are different from those in a live environment, there are a number of issues that need to be considered:

Reliability of the technology: While there is often an assumption that the technology will work in the way that it is supposed to, technical issues are commonplace; participants drop off calls, their video freezes or their audio breaks. Even the potential for this to happen can cause anxiety for some in advance of a meeting. Furthermore, some are more confident than others about their understanding and use of their local technology, such as adjusting their own volume or camera settings.

Accessibility: Many digital platforms have created accessibility features for people with vision impairments or those who are using keystrokes only. At the same time, this is of little use if all other aspects of the workshop are not accessible. The National Disability Authority have created a short guide to accessibility for online meetings that covers many of these issues.

Online behaviours: Using digital platforms has become a mandatory part of the work of many organisations but, as this happened suddenly in the midst of a pandemic, many have not yet developed clear protocols or codes of conduct for behaviours on these platforms including, for example, how to interrupt, when to use a chat box and for what purpose, whether to use other platforms simultaneously, who can share their screen and when to turn on or off the camera. In live facilitations, an initial activity is often to agree 'ground-rules' for participation. This, for various reasons, may not happen on digital platforms and so it can lead to a wide variety of online behaviours.

Building trust: Many workshops actively build some level of trust and rapport. It is more difficult to build trust online with a group if it does not already exist via a prior level of contact. Camera setups make proper eye contact difficult. Participants turning off their camera, regardless of the reason, can also hamper trust. Other factors can affect trust such as people not appearing to pay attention during a call or sitting in shadow so that they can only be seen in silhouette. There can also be a lack of trust in the platform itself; people can worry about having to share their data with the host in order to attend, or about the fact that the camera is providing a view into their home, or perhaps they have been 'zoom-bombed' in the past where an inappropriate attendee gained access to a meeting.

Identity and authenticity: What we seek from workshop participants is often authenticity; it is also what they seek from us. Digital platforms, however, are an artificial environment, made even more uncanny by the fact that we can usually see ourselves on screen when speaking. To what extent does this inhibit our ability to be comfortable and for others to feel the same?

Institutional advice: Many institutions have produced guidance for remote working and for the use of online platforms. They cover areas like data protection and security, licencing restrictions and appropriate use. The institution must consider legal, ethical and reputational risk and so may restrict the use of certain platforms or online tools.

Adapting to Digital in a Health Crisis - A Case Study
LIMERICK – LET'S TALK ABOUT OUR MAYOR!

At the beginning of the year, University of Limerick instigated a stakeholder consultation process to inform the role of Ireland's first directly elected Mayor with executive functions. We were interested to hear voices from the citizens of Limerick City and County to contribute to the definition of role. Our original plan, to host local consultations across the county and gather people's feedback into a report, coincided exactly with the outbreak of COVID-19 and all the restrictions that this entailed. Rather than abandon the consultation process, we were challenged to re-imagine and re-configure it for a move online in lockdown.

We got wonderful support throughout the summer from colleagues inside and outside UL and from community partners old and new, including UL's Knowledge for Change (K4C) mentors; Limerick Youth Services; the Limerick Public Participation Network; and our collaborative partners, a company called e-Townz. I never once contacted anyone for help without receiving an immediate and positive response.

Together, we built a website, designed explanatory videos and cartoons, and created survey materials for use online and offline. We hosted 21 facilitated community conversations online ourselves and provided the resources and toolkits for groups to host their own conversation with family or friends. In total, 927 people from Limerick City and County participated, providing a robust evidence base for the report that we delivered to the IAG and Department of Housing, Planning and Local Government. You can find it all on the Limerick Council website: ourmayor.limerick.ie. The Limerick Mayor project showed me how much we can do.

Dr Maura Adshead, Head of UL Engagement, University of Limerick

Running Your Online Workshop

While this guide is aimed at those running workshops, it may also be of use for focus groups, one-to-one interviews and other online forums. This section provides some basic guidelines on Preparatory Work, on Running the Workshop and on Follow-up Work.

Preparatory Work

This section suggests the preparatory work that may be needed to build trust and connection with engaged research workshop participants:

Setting the Scene

State your goals: You must always begin with asking yourself what you need to achieve from any engagement. When linking with stakeholders as part of an Engaged Research project, the researcher will have a particular purpose in mind, e.g. to ask participants to brainstorm an idea or issue, to ask participants to articulate a societal issue from their perspective. You need to get clarity about what goal you want to reach or impact you want to make from an engagement and explicitly state it.

Schedule an appropriate time: Consider when those in your group will be most likely to take part, based on time-zones, caring responsibilities, quiet times or times where privacy can be assured. Also, you must

consider for how long this session should last. If it goes on beyond an hour, it is probably too long. If it must go on for longer, provide appropriate breaks such as comfort breaks or tea breaks.

Decide on your platform: Decisions about what platform to use will depend on what is available to the people in your group, what you and they are familiar with, what technology they have in order to participate, what your institution recommends and what functions are required in the workshop or by the group to ensure their participation. You can explore a number of tools from a Fast Track Impact blog, which considers features such as level of interactivity and functionality.

Choose your activities: Keep your activities short and easy to understand. It is difficult, when working online, to gauge whether people can understand you and it is impossible to know whether you have their full attention. By keeping activities short, it gives the discussion a refreshing sense of motion and maintains attention. By making them easy to understand, you reduce a sense of confusion or exclusion. Remember that participants cannot check with the person beside them or watch what others are doing in order to pick up what you mean.
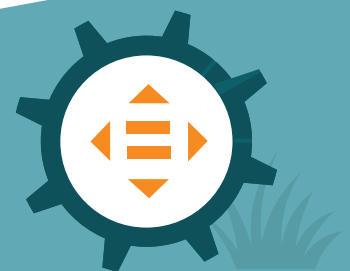
Consider activities that participants can do alone and that they can then share easily either by presentation or by typing into the chat-box or writing on paper and holding it up to their camera. Also, if your platform allows, breakout rooms can provide a chance for participants to deliberate and most find them an enjoyable experience. It is important to ensure, however, that there is someone to take a proactive lead and facilitate the discussion in each breakout room.

Be device neutral: You may be working from a laptop or desktop but some of your participants may be using their phone or tablet. You may have a full range of tiles across your screen showing every participant, but they may simply be looking at one face at a time on a handheld screen. Anything that you present on screen should be readable from a smartphone screen.

Consider ethics: As with any activity, you should always consider the ethical implications of what you are planning. Will any of the activities, for example, put the participants at risk? Are they participating following a process of informed consent for participation? Are they aware that they can withdraw from the process at any point? Will the activities bring up any issues or trauma for participants and, if so, how can they be supported following the activities? Also, it is important to consider the data

protection implications of including people, particularly because you will need to have contact data on participants and you may need to share that with other team members who are organising the activities (for more, see below).

Preparing Your Group

Invite your group: Keep your group relatively small. It can be difficult to keep track of any more than twelve people on a digital platform. It is also more difficult for a large group to interact with one another so veer towards smaller rather than larger groups.

Keep data protection in mind: As always, keep consent and data protection rights in mind when inviting participants: for example, are you using people's contact details in a fair manner? Are you keeping their contact details safe and not sharing them with others? Are you providing enough information for someone to make an informed decision about being involved? Are you giving them sufficient time to consider their involvement? Can they withdraw easily?

Engage with participants in advance: Inviting participants to be part of the workshop is an important initial interaction. There may be other options beyond an email, such as sending an invite or explanatory flyer through the post or making a phone call. An initial one-to-one chat, whether by phone or on the platform that will be used for the

engagements is strongly encouraged, to put participants at ease. The invitation does not have to be the only pre-workshop contact. You may, for example, invite participants to engage through a bulletin board in advance of the workshop or you may send them a pre-workshop survey. By opening the lines of communication, you are beginning to build trust and to give people an opportunity for reassurance about the process.

Be clear with participants: Provide very clear guidance to the participants in advance on how everyone can get the best out of the meeting. Not everyone is a regular user of these platforms so be explicit about things like how and when to mute your mic when not speaking or how to blur your background.

Preparing yourself

Prepare to fail: Online engagement is fraught with poor connections, battery power failures and unanticipated interruptions. It is helpful, therefore, to prepare for the worst and so, when it happens, you will have planned how to keep the individual or group engaged and, if you cannot, how you can engage with them after the workshop. Have a template group email or text message drafted and ready to go should you need to reissue the meeting link to communicate with the group outside of the meeting platform.

Find a co-facilitator: Even if you are very familiar with a platform and are comfortable with leading, while answering chat-box questions and dealing with technical faults, it is often better to have at least one fully briefed co-facilitator who will help with the process. If possible, have more than one additional person and ensure that one of them is only dealing with technical issues. It is useful to discuss strategies that your co-facilitator can implement, for participants who may unintentionally disrupt the flow of the workshop. These interruptions may be due to technical issues, or their need to address a side issue not related to the objectives of the workshop or for other unanticipated reasons.

Test the tech: Provide slots where you invite participants to 'test the tech', ensuring that they can log onto the platform, that their camera and mic are working and that they can understand any other functions that will be used such as the chat-box. This is another opportunity to engage but it also reassures people that their technology will work on the day. It also provides an opportunity to explain the accessibility features of the platform and to find out if there is anything that they require, e.g. a participant may require that people keep their cameras on for lip reading.

Prepare the setting: Ensure that you are well-lit and consider using a mic to ensure that you can be seen and heard clearly. Also, reflect on what your setting and your clothes are communicating to the participants. Does it match the impression you would like to make with participants? How formal is the atmosphere you wish to create?

Running the Workshop

This section provides a structure for the workshop itself:

A Good Start

Invite people in advance of the official start: Akin to the refreshments before a workshop, this time is an opportunity for people to meet with you and, once again, for you to build trust and rapport with them. It is also an opportunity for people to retest their tech and, for those having trouble logging onto the platform, to resolve any issues or find a different device. It can also be a helpful 'icebreaker' activity for participants in advance of the workshop. **Refresh the tech**: Remind people about the functionality of the platform such as muting mics, sharing screens, typing into the chat-box.

Agree ground rules from the start: Restate the length of the workshop and whether there will be breaks. State how people can ask questions, interrupt or endorse another speaker's comments. Explain the role of your co-facilitator, e.g. they will respond to questions in the chat-box. In live environments, the beginning of the workshop is often a time to agree behaviours around confidentiality, around listening to others, around supporting one another. It is important to ask the group to suggest some of these ground-rules and reach an agreement on them. It may be something you would like them to discuss in small breakout groups, thereby giving them an opportunity to test them out straight away.

Be directive: Also in live environments, a group can figure out their roles and interact with one another until they reach consensus. On digital platforms, this is much more difficult. As the person leading, you must be more directive. For example, if you are having breakout groups, you must decide who will be in what group and who will report back after deliberations.

Explain yourself: On most digital platforms, participants rely on what is said or written to them as the sole source of information. Picking up on body language or quietly asking the person
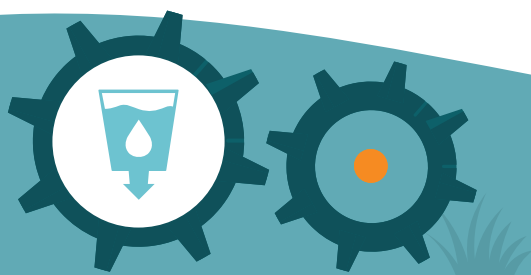
beside them is not an option. Even if you have their full attention, which you may not, you cannot over-explain anything.

Introduce your co-facilitator: Let your co-facilitator address the group, if that is applicable, giving them time to explain their role in this process.

State your goals: Inform the group about what you are trying to achieve in the workshop. Explain that people are free to leave at any point. On digital platforms, there is little scope for improvising new activities so, unlike a live environment, you cannot ask for suggestions.

Explain what will happen if things go wrong: If, for example, a participant experiences a broadband slowdown, they can turn off their camera. If their device begins to malfunction, they can phone into the platform if that is possible.

Begin with an activity that gets people engaged in the overall topic: This is the equivalent of a warm-up or icebreaker. As time is limited, it should be relevant but short. This can be a poll using a tool such as Slido, Zoom polling or a one-question quiz where participants write their answers and hold them up to the camera - whatever works for the topic and for your available platforms.

State the structure of the rest of the workshop: Now that some level of rapport is built up, you can state what will be the activities for the rest of the workshop.

Your Main Activities

Run your activities: You will be clear in advance about what you will do and how you will do it. You will be clear about who goes into what subgroups or breakout rooms and who will report back. You will have decided all of this in advance (see above). And you will be ready with a 'Plan B' for each activity if anything goes wrong, or alternatives for those with low literacy or using devices where they cannot easily use certain functionality.

Here are some examples of things that you can do:
- Use an image or a video clip as a way to spark discussion. Visuals and imagery are much more compelling than text on screen within these platforms.

- Use breakout groups (in Zoom, in Teams, in WebEx) to split up the main group into smaller discussion groups. Remember to appoint a scribe within each group in advance of the breakout. As with face-to-face interaction, ensure that there is time for feeding back

- Use Slido or Mentimeter to run an online poll for participants where they can vote in private on a topic, issue or question

- Use Jamboard as an online flip chart. Participants can write on the board, stick on post-it notes and images

- When using presentation slides, either keep them to a minimum or break them up so that participants do not need to focus on the slides for a long period. Again, try and make them visually appealing, using more images than text.

A Good Finish Point

Find some way of reflecting back to participants what was achieved in the workshop. Your co-facilitator might do this.

Look for reflections on the workshop: Ask participants to reflect on the work achieved, on their contribution to it and how they found the experience. You can either do a 'round robin' to ask people to state their thoughts and reflections, or you can invite them to type it into the chat-box or to email you directly afterwards.

Ask for reflections on the digital process: Elicit some feedback on how people found the digital platform. Again, this can either be a 'round robin', or can be via the chat-box or a subsequent email.

Follow-up Work

Your workshop may be a 'one-off' interaction with participants, but it may have raised an expectation among participants that they are, in some way, involved in a larger process. It is, therefore, important to show the tangible results of the work. You also owe it to future researchers who will contact them about participating in online workshops.

A note of thanks: Find some way to thank each participant personally such as via an email, card in the post or phone call.
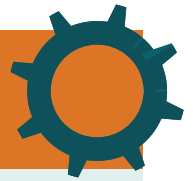
Summarise: Send the participants a summary of what happened at the workshop and its outcomes.

Next steps: Explain what is due to happen next as a result of the workshop and, if they are expected to play a further role, when you will be back in touch with them.

Dementia Research Advisory Team Webinar - A Case Study
PROOF OF WHAT IS STILL POSSIBLE

The Dementia Research Advisory Team in the Alzheimer Society of Ireland are a group of people either living with or supporting someone with dementia, who work with researchers to help inform and shape their research to improve or change policy, practice, services for impact.

When the pandemic hit, it felt like so many of the researchers simply disappeared. At the time, it was a real disappointment that those relationships just stopped. But, in retrospect, like everyone else, researchers just didn't know what to do for the best and many simply put their plans on hold.

So, in an effort to be more proactive, our Team organised a webinar for researchers to reassure them that, even though we are living through a pandemic, there are people with dementia still willing to support researchers in their work and to help and guide them to do good research in this area.

The webinar became a chance for researchers to hear people with dementia and their peers talking about their experience of working together during the pandemic, to hear a funder reassuring them that patient and public involvement in research is still a priority but, most of all, it showed people with dementia actively working and communicating through a digital platform.

Sometimes it can be underestimated what people with dementia are capable of, so it was great to have the Team running an event on a digital platform as proof of what is still possible.

Laura O'Philbin, Research Officer, The Alzheimer Society of Ireland

Conclusion

The pandemic has required adaptation to new circumstances, innovation in new approaches and acceptance of new realities. It has also broken down a lot of resistance to remote engagement among organisers and participants alike. Digital skills have been developed among previously reluctant adopters as people tried out different platforms for work, school, social engagement and family contact.
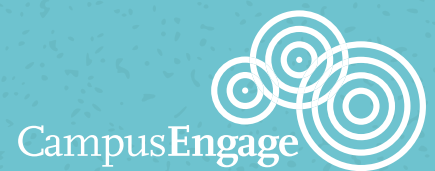
Even as we look forward to the prospect of a return to face-to-face activity in the future, this may be in the context of using a hybrid live/digital model for future workshops. Hybrid workshops may break down geographical, access or territorial issues to ensure greater numbers can contribute to Engaged Research for societal impact.

This guide captures some of the learning from the increased use of digital platforms. It also provides a starting point for a larger discussion about what compelling possibilities are achievable in the future using these platforms.