Recruiting and Retaining Participants: Best Practices in Virtual Environments

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Introduction

The virtual environment offers public health programs unique advantages and disadvantages for recruiting and retaining participants. Meeting participants in person has always come with challenges such as time commitment, scheduling conflicts, and childcare and transportation costs. While online engagement can alleviate many of these barriers, the technology itself can present new obstacles. Community members may have limited access to wifi (i.e., wireless broadband) and connected devices necessary for virtual engagement, and many technology platforms often come with a learning curve or require a high degree of digital literacy to use, disproportionately impacting non-English speaking and low literacy community members. Planners should consider carefully their goals and let those goals drive their technology decisions (Local Housing Solutions, 2021).

A shift to a virtual environment can still be inclusive if public health programs remember a people-first approach. The Colorado Office of Health Equity argues that "while virtual tools can help bring participants together, it's the people that create the experience" (2020). Careful planning, consideration of digital justice and technical access, and thoughtful facilitation of virtual meetings will help public health programs maintain the people-first attitude necessary to successful recruiting and retention (Colorado Office of Health Equity, 2020).

Understanding and addressing the barriers to technology access is an essential part of the recruitment strategy. Send a survey to community members asking specifically about technological capabilities and ask trusted stakeholders and community partners for their input. Loaning out technology like laptops, tablets, and mobile hotspots, conducting pre-meeting training sessions, and incorporating technology learning into the meeting are effective ways to address barriers to technology access (NIH: National Cancer Institute, n.d.). For successful virtual engagement in Indigenous communities, it is especially important to connect the virtual environment back to the land, language, and culture and ensure that elders have the practical support they need to navigate the technology and participate online (Sheedy, n.d.).

Online recruitment and engagement efforts will benefit from incorporating both high and low-tech engagement strategies (NIH: National Cancer Institute, n.d.). Reach out to potential participants with social media and email, but also with postcards, radio and phone calls. Weave in low-tech strategies to virtual meetings to facilitate community building and keep participants engaged. Icebreakers, questions, jokes, breakout groups, frequent breaks–

these familiar strategies work just as well in the online environment as they do in face-to-face meetings.

Article 1: *Virtual Community Engagement*

Summary

Online engagement offers public health programs unique advantages and disadvantages for organizing and retaining participants. **Online engagement lowers the bar for entry for some, eliminating travel time, childcare and transportation costs, and other logistical barriers presented by in-person meetings.** For others, the technology itself may present a significant obstacle. Online data collection tools make it easy to collect information, ideas, and feedback from the community, but you lose the idea-generating synergy and interpersonal connections that can happen in an in-person meeting where community members build on each other's ideas. Social media is a great way to meet your participants where they are, but creating useful content and moderating these posts is time consuming for program staff.

Strategies that are intended to help online engagement efforts have trade-offs as well. For example, virtual meeting software struggles with overlapping voices. When multiple people speak at once, no one is heard. However, requiring participants to be called on by moderators interrupts the natural flow of ideas and sets moderators up as gatekeepers, determining who will speak and when. Allowing support staff to mute participants has similar complexity. When background noise disrupts the rest of the meeting, it is helpful, even considerate of other participants, for moderators to mute the person who doesn't realize they are causing a distraction, but this allows moderators to literally silence participants. Choosing a digital meeting platform that doesn't require a log-in or preregistration lowers technological barriers to entry for participants. However, logins not only make it easier for programs to track attendance, feedback, and participation, they also answer privacy and security concerns.

Three Case Studies

Case Study 1: Montana
In Missoula, Covid-19 forced planners of a new land use and transportation plan to move a week-long, in-person workshop online. **Planners developed an informational website, a calendar with stakeholder meetings and virtual workshops and studios, a series of brief, and informational videos on different elements of the plan.** They also solicited written and visual

feedback from community members in the form of surveys and interactive maps that community members could draw on to communicate their land-use ideas and preferences. These planners found that while past, in-person workshops recruited only a few hundred attendees, thousands of community members participated in the online process, including community members who historically had not participated before. Participants reported that the online features made it easier to understand and participate in technical discussions.

Case Study 2: Michigan

City planners in Kalamazoo wanted community input on updates to the city's master plan, but had a low budget for this outreach. **They made use of no-cost streaming services, hosting meetings and collecting feedback from the chat feature.** They created informational videos in several languages and partnered with local TV stations to share those messages. They also built a simple but comprehensive website and paid for survey tools. Along with virtual meetings, they also held a phone-in town hall meeting for community members without internet access, which they advertised on social media, flyers, radio, TV, and at community meetings.

Case Study 3: Massachusetts

In Cambridge, the city Redevelopment Authority created a central website to engage the community on a major urban renewal project. The website acted as a central hub for information about the project and included plans, maps, and a meeting calendar. The Redevelopment Authority found that the website was an effective way to get the word out about the project and connect community members directly to planners. The website was most successful when connected to additional outreach strategies like texting campaigns, surveys, and interactive mapping tools. **They found the website was not an effective way to communicate more complex data. The Redevelopment Authority also concluded that the virtual environment is not conducive to resolving disputes among community members.** While face-to face conversations allow for healthy debate about benefits and drawbacks of a given project, online discussions lack this nuance, and participants quickly settle into either for or against camps, leaving no room for further discussion.

Implications for practice:
- Ask community groups and leaders for their advice on how to virtually engage.
- The more paths to engagement you create, the more effective your engagement strategy will be. Use multiple platforms to engage and seek input from the community.
- Let your goals for engagement drive the technology you use, rather than the other way around.

- **Online collaboration tools** are useful to include stakeholders in a collaborative process, allowing many people to directly contribute ideas and feedback to a shared document or other online space. Planners should consider how they will organize and track changes, before inviting public comments.
- **Online survey platforms** are ideal for gathering a large volume of data quickly. These platforms often have translation options and built-in logic that automatically skips questions that are irrelevant to a given respondent. (I.e., No more "If no, skip to page 6.") While the survey platforms themselves are often free or low-cost, developing a useful survey and analyzing the results will require an investment of time and money.
- **Online meeting platforms** are best for facilitating community discussion and debate. Challenges for online meetings include keeping participants engaged during presentations and eliminating technical barriers to attend such meetings.
- **Streaming platforms** allow health programs to speak directly to a large number of community members. While there are comment features on some streaming platforms, this is primarily a one-way communication.
- **Social media** is useful for reaching community members who may not engage in any other way, inviting a more diverse group of people into the process. Social media allows you to record and stream live video, share information, answer community member questions publicly through posts and groups, and privately in direct messages, create invitations to upcoming events, and foster community connection through community groups. However, all this requires careful monitoring and planning from a staff member who is comfortable on these platforms.

Citation

Conducting virtual community engagement. Local Housing Solutions. (2022, February 1). Retrieved May 25, 2022, from https://localhousingsolutions.org/plan/conducting-virtual-community-engagement/.

Article 2: *Inclusive Virtual Community Engagement During COVID-19*

Summary

In addition to the usual who, what, where, when, and why questions of any planning process, **virtual engagement planners need to consider factors like community outlook, and technology access, and engagement methods.** Stress and fear caused by the Covid-19 pandemic, especially in vulnerable communities and communities of color, may decrease participation. Get a feel for the community's interest and access with a short, succinct survey, sent directly to your community. This will help you decide which tech platforms and engagement strategies will be most successful. Remember, virtual engagement does not always mean high tech engagement. Postcards, texts, telephone conference calls, and surveys are all ways to engage without meeting face-to-face.

For a smoother virtual meeting experience, facilitators should spend a few minutes at the beginning of the meeting going over how to use the platform, pointing out the mute/unmute buttons, the chat, and other functions, for both PC and mobile users. Outline up front how comments will be handled, e.g., raising hands, waving, noting in chat. **Opt for a conversational tone over a lecture format, to maximize engagement.** Ask participants for a thumbs up or thumbs down to indicate they're ready to move on to the next topic, designate a staff member to reply to comments in the "chat" box, and take live notes that the attendees can see on their screens. This will keep participants engaged and let them know they are being heard.

In many cases a virtual format can be optimized to maximize convenience for community members and increase participation. Record virtual meetings and allow people to submit feedback and comments after watching the recorded meeting. **You'll know your outreach strategy has been successful when your participants match your community's demographics including underserved and harder to reach members of the community,** when these participants are actively sharing their wisdom and ideas, and when your participants are no longer participants but partners.

Implications for practice

- Take care when choosing meeting technology. Consider the total experience of participants. Lengthy set up processes and frustrating user experience will drive away participants.
    - How long does it take to download the meeting app, create an account, sign in, and join the meeting?
    - Does the meeting platform work well? And does it work well on multiple technologies and operating systems (i.e., smartphones and laptops, Android and iOS?)
    - Is it free or low- cost?
    - Can non-English speaking or low literacy community members access this technology? (Are there visual components and non-verbal cues? Does the platform support simultaneous interpretation?)
- Keep meetings short and surveys shorter. Remember, families may have limited data, and Wi-Fi connections and devices may be shared among family members.
    - Meetings should be no longer than one hour.
    - Surveys should take no longer than 5 minutes to complete.
- Don't forget low tech options like postcards and phone calls.
- Familiarize yourself with the features on social media and video conferencing platforms that can help you.
    - Program staff can do a dry run of the meeting to learn the features.
    - Many platforms have engagement-driving functionality built in, like chat features, emoji reactions, and polls.
    - For public virtual meetings, use waiting rooms and set screen sharing to "host only" to prevent "zoom bombing" (where trolls join a meeting with the purpose of disrupting it.)
    - Use geotargeting features on social media to limit invitations and publicity to people in a designated zip code or area.
    - Create and invite participants to a private Facebook group. Make a membership policy of asking specific questions to potential new members to ensure they meet your participant criteria.
- Get curious about silences in meetings. Understanding the reason for silence leads to the best strategies to spark discussion.
    - Embrace the silence. People may need time to reflect.
    - Speaking in public can be intimidating and virtual environments are inherently awkward. Start the meeting with icebreakers to create social cohesion that makes it feel safe to speak.

- o Communicate ahead of time. Participants who show up to a meeting expecting to listen and learn will be quieter than participants who are prepared to share.
- o Ask questions and use prompts to encourage participation.

Citation

Inclusive Virtual Community Engagement During COVID-19. Colorado Office of Health Equity, Department of Public Health and Environment.

Article 3: *Virtual Community Engagement: Indigenous Practices*

Summary

Organizing online community events in rural and Indigenous communities presents a particular set of challenges and barriers. These authors offer wise practices to help overcome barriers and host effective and empowering meetings.

Make a connection to land and culture, especially in virtual meetings. Incorporate cultural activities with other meeting agenda items (such as prayers, ceremonies, and songs). Ensure that elders and knowledge holders have a role in the meeting and planning stages, along with the practical support they need to navigate the meeting technology and participate online. Connect the digital meeting to the land by displaying maps with traditional place names or images of the land, sharing knowledge and wisdom about the current season, and encouraging participants to walk outside during breaks.

Create a caring, healing, and connected environment. Caring, healing and connection are important for decolonizing communities. Allow time for meeting attendees to connect and show care for each other. Practice trauma-informed approach to meetings, including taking lots of breaks and recruiting counselors and elders to provide additional support for participants in virtual breakout rooms. Facilitate with patience and compassion. Schedule breakout sessions to give attendees a chance to get to know each other in smaller groups. Keep meeting agendas flexible to allow more time for any of the above if needed.

Communicate and engage to get people to come. Develop a communications plan that answers who you are trying to reach, what will engage them, what they need to know before deciding whether to attend, and what concerns they might have. Use plain, error-free language and include relevant details. Keep the tone positive, focusing on the chance to do things

together. Incentivize attendance creatively with door prizes, or well-known co-hosts and presenters.

Make sure the meeting is accessible. Brainstorm different ways people can contribute to the conversation, whether your meeting will be entirely online, or doing a hybrid of online and in person. Consider the barriers attendees might be facing, from linguistic to technological, and figure out how to address them. Offer translation, lend out laptops and tablets, open your office to community members needing Wi-Fi access, and/or organize technology training ahead of the meetings.

Prepare ahead of time. Define your goals and purpose and understand the reason for choosing to meet.

- **Assign roles for your core team** Roles may include host, note-taker, chat facilitator, tech support, and break out room facilitators. Do a practice meeting with these key team members to test functionality, assign permissions, and run through roles beforehand.
- **Make a participant list.** Find out what linguistic, cultural, and technological supports are necessary for each participant, and determine how to meet those needs.
- **Create agendas for participants** Include a welcome, a tech demonstration, introductions and icebreakers, scheduled breaks throughout the meeting, and set times for breakout sessions and small group discussions.
- **Consider an additional agenda for staff** outlining roles, responsibilities, goals, and timing for each segment of the meeting.
- **Decide on technology and materials.** Choose a meeting platform and make sure your core team knows how to use it. Prepare supporting materials, such as slides, and figure out how to collect, store, and share the "harvest" of your meeting–ie. the ideas and questions your participants generate during the meeting.
- **Will your meeting be completely online or hybrid?** A hybrid meeting happens partially online and partially virtually. For example, small groups could meet in satellite locations, and then connect to the main meeting via Zoom or another platform. Make sure hybrid locations have a facilitator in person, along with the necessary technology to join the larger group.
- **Will your meeting be recorded to share with people who can't attend?** Get consent from meeting attendees ahead of time.

During the meeting itself, employ these strategies for a smoother and more meaningful meeting experience.

- **Hold an opening circle** for small meetings. Circles are a traditional way to start meetings in Indigenous communities, ensuring that everyone gets time and space to express themselves.
- **Establish meeting guidelines together.** Create a group culture by collectively deciding on guidelines about acceptable and unacceptable behavior. This sets a focus for the group and gives the facilitator the authority to uphold the group standard.
- **Icebreakers** are a good way to both encourage participation and to practice different features like chat, mute etc.
- **Breakout groups** are great for encouraging participation. Many find it easier to share in front of fewer people and they also give the opportunity for people to get to know each other better.
- **Encourage participation and engagement.** Keep the meeting energized with frequent breaks and invite people to stand and move around as needed. In addition to encouraging comments, encourage alternate ways to participate such as using reactions or adding to a chat or shared document.
- **Involve all participants in decision making and ensure you have consensus.** Articulate a clear proposal and repeat it at least 3 times and share it on a screen where everyone can read it. Ensure consensus in one of three ways:
    - Ask for objections, leaving time for people to reflect before answering.
    - Do a circle to ask people if they agree, disagree, or need more information.
    - Ask participants to show a thumbs up or thumbs down.
- **Ask for feedback.** Towards the end of the meeting, ask for feedback about the meeting in the chat. You're more likely to get a response before people leave the meeting and return to their busy lives.
- **Follow up.** Immediately after the meeting the core team should debrief and reflect on how things went, and lessons for next time. Follow up with participants with a thank you, info on what's coming, links to resources, meeting minutes and other information.

Implications for practice:
- Incorporate indigenous language and culture into the meeting through ceremony, prayers, and songs etc.
- Involve elders in the meeting and identify ways for them to share their knowledge. Make sure they have tech access that they need. If they can't come to the meeting, call them ahead of time to ask for their opinions. Share them during the meeting.
- Plan for a trauma-informed meeting. Schedule frequent breaks and keep meeting agendas flexible to allow for expression of emotions, feelings, opportunities for participants to share and connect with each other.

- Plan ahead for translation needs
- Practice the technology during the meeting. Demonstrate how to use tools like mute and unmute, how to rename yourself on the screen etc. Play an online game beforehand, such as Bingo to make learning the technology more fun.
- Ask participants to introduce themselves at the start of the meeting both to practice the technology and to create human connection.
- Facilitators and core team members should have a way to communicate with each other outside the public facing chat, such as messenger or SMS.
- Ask for feedback about how the meeting is going in the chat or a poll during the meeting itself. You are more likely to receive feedback during than after.

Citation

Sheedy, Amanda. Virtual Community Engagement Guide: A Toolkit for Hosting Online Community Engagement and Meetings in Rural, Remote, and Indigenous Communities. Nature United.

Article 4: *NCI Tips for Engaging Communities Virtually*

Summary

To engage stakeholders virtually and build community in a virtual environment, NIH: National Cancer Institute offers these five tips.

Choose the right digital platform. Zoom and WebEx are popular for large meetings and Slack and Microsoft Teams are good options if you need to share and collaborate on documents. To eliminate a learning curve, consider social media that your community may already be using.

Make meetings interactive. Invite participants to interact and foster a sense of togetherness through high and low-tech solutions. Online polls, white boards, and other collaboration tools allow attendees to collaborate and organizers to capture the ideas and feedback gathered at the meeting. Low-tech methods work too; music, icebreakers, jokes, and scheduled breaks will keep a meeting interactive and engaging.

Practice mindful communication skills. Start meetings with icebreakers and introductions. Kick off discussion with easy-to-answer questions. Communicate frequently and accommodate participant's communication preferences whenever you can.

Practice recruitment and retention strategies. Ask partner networks or insight into how best to engage the community. Incentivize attendance with prizes and raffles. Be mindful about scheduling and keep the meetings lively, relevant, and interesting.

Know your population and adapt to their needs. Trusted stakeholders can be a great resource to help you discover what accommodations your target population needs. Provide resources like stipends for meeting attendance or loans of technology. Offer multiple methods for participants to join, like a dial-in option for virtual meetings, or a phone-only conference call.

Implications for practice:
- Don't rely solely on technological tools to keep meetings engaging and lively. Icebreakers, jokes, music, and scheduled breaks can go a long way in a virtual meeting.
- Let participants know what to expect before a meeting and for recurring sessions, stay in touch between meetings.
- Make presentation data available on and offline after meetings.
- Infographics are a great way to share data and make it accessible.
- Incentivize participation and attendance with raffles, prizes, and stipends for time spent in meetings.
- Recruit via accessible platforms such as radio and social media.
- Loan laptops or other technology necessary for participation.
- Offer multiple ways to connect to a meeting, video and dialing in.
- Schedule mindfully and flexibly. Your participants may have competing priorities.
- Send agendas and materials to participants in advance. This gives participants time to consider and develop ideas and comments.
- All your considerations for in person meetings still apply: communicate agendas in advance, send reminders, keep meetings lively and interesting.

Citation

National Cancer Institute. Tips for Engaging Communities Virtually.

Conclusion

This review provided an overview of selected practices to help community-based Organizations recruit and retain participants in virtual environments, a process that has become increasingly important during a global pandemic, in which digital literacy and technological competence has become a requirement for a connected life. This review suggested that while the virtual environment offers public health programs unique advantages and disadvantages for recruiting and retaining participants, such as the ability to reduce the need for transportation, while maintaining a need for childcare and time commitment.

The organization Local Housing Solutions provided three, real-life examples, from Massachusetts, Michigan, and Montana, that demonstrate how organizations have built connections and capacity through online methods. Likewise, the Colorado Office of Health Equity shared their insight about effective practices in online settings, such as the use of engaging methods (i.e., conversation over lecture tone during a synchronous meeting) in order to encourage participation from populations that can be difficult to reach. Next, the organization Nature United presented strategies for increasing engagement in rural, remote, and indigenous communities– groups that can be marginalized in an urban-centric environment. By focusing on accessibility as part of an effort to heal and connect, these strategies aim to make participants feel comfortable with community and with technology. Finally, the National Cancer Institute created a list of tips for participation and interaction online, such as the use of online polls and other collaboration tools; practicing mindful communication skills; and know the population in an authentic, meaningful way. Overall, this review aimed to provide valuable skills to help lower the barriers to community engagement and full participation in a digitally connected society.

Author Biography

Benjamin Gleason, PhD is the Director of Applied Research for the Prospectus Group. He earned a PhD in Educational Psychology & Educational Technology from Michigan State University, researching how to best support communities of learners through educational technology. An assistant professor of educational technology at Iowa State University, he has published over 20 peer-reviewed articles in research journals. Before academia, Benjamin worked in youth and adult-serving learning spaces, designing youth-initiated community service projects and teaching high school in Richmond, California, and working as a university instructor in Guatemala. Benjamin is also a co-founder of the Prospectus Group.

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