

## **Shared Learning Group on Involvement**

### **Involving people when you can't involve them face-to-face: Sharing experience**

#### **Introduction**

During this pandemic, it's more important than ever to listen to the voices of people we seek to support. Many of the people we support say that they want to be in touch now more than ever and that they want to continue to have a say in decisions that may affect them.

Most charities have little experience of involving people virtually on a regular or large scale basis – until the last few weeks, much of their involvement activity has been face-to-face, because this is what many people prefer. We all need to move fast to respond to the changing situation. So members of the [Shared Learning Group on Involvement](#) came together (via [Zoom](#)) on 27<sup>th</sup> March to share their experience to date and to come up with some tips and ideas.

Thanks to Matt Murray from Versus Arthritis for initiating and facilitating the call, and to everyone who shared their experience. A list of participants is at the end of this paper.

#### **Experience before the pandemic and more recently**

Most members had done some involvement online, and some charities were in the process of scoping different online options. Other charities, especially those that support people who can't get together face-to-face, were already doing a lot of online activity.

All members are now seeking to involve people online to a much greater extent and are having to move fast to do this. In some cases this has meant talking with funders to enable funds to be re-purposed.

#### **What are the advantages of involving people online?**

- It can be a preferred option for people who can't travel or who find travelling difficult
- It's cheaper than bringing people together face-to-face
- It can be quicker – for example it's much quicker to run an online survey than to plan and run a big face-to-face meeting
- It enables charities to reach a wider range of people and to do this over a bigger geographical area
- It enables charities to bring people together who are in different geographical areas
- It can enable people to link up with each other (e.g. for peer support) at very little cost

## What are the challenges?

- For some groups of people, virtual involvement is extremely hard or impossible – e.g. some people with learning disabilities, people who don't speak English (if you are running online involvement activities in English), people who don't have access to the internet or who don't feel confident using social media
- It's harder to build a rapport when you don't see people face-to-face – there are less informal opportunities to chat and you can't see their body language very easily, if at all
- There are security and safeguarding issues – e.g. if you run a WhatsApp chat, people taking part will be able to see each other's phone numbers – do you have their permission for this?
- On video calls, some people can be shy and won't want to turn their camera on
- Also on video calls, some people may not be comfortable with other people seeing where they are. Or this may not be safe for them.
- People who are vulnerable may not feel safe at all online
- We're struggling with how to run virtual icebreakers
- It can be hard to work out how many people are actively involved – some people may just join a virtual chat to listen. There's nothing wrong with this – it just makes reporting on numbers challenging
- It can be hard to facilitate online involvement well if some people join online and others dial in, especially if they have access to different information (e.g. those who dial in can't access a 'share screen' function).

## What else can you do if you can't meet face-to-face?

If you can't involve people virtually, we have used:

- Email – it's familiar and accessible to many people
- Teleconferences – using a freephone number. These are great for people who don't feel confident using online platforms or those who don't have easy access to the internet
- Individual phone calls. Although this is time consuming, it's a really good way to reach out to people who may not be able to talk online

## What platforms do members use to involve people online?

### Most commonly used platforms for running meetings

The most commonly used tools for online involvement meetings were Skype, Teams and Zoom. **Zoom was felt to be the most user friendly tool for online involvement meetings.** Views about each of these platforms are below.

## **Zoom**

Many members are using Zoom to involve people virtually. Advantages include:

- It's very user friendly and easy to use
- Good functionality and stable calls
- There's an option for people to raise their (virtual) hands if they wish to speak
- You can share your screen
- Breakout rooms are a really good idea and easy to set up
- You can also run polls as part of the meeting
- People can join via the internet or by phone
- You can record sessions
- People can blur their backgrounds to keep their personal space private

We didn't identify many limitations. Minor ones: the co-host can be assigned to a breakout room, but the host can't – they have to put themselves into a room. And the online polling function is anonymous unless participants register.

Our sister group - the Charities Research Involvement Group - has produced advice on using Zoom for big interactive meetings – see the 'more information' section of this paper.

## **Microsoft Teams**

This was also seen to be a useful tool. Advantages include:

- Stable calls
- Good quality
- It's easy to use
- You can share your screen with people
- People can join via the internet or by phone
- You can record sessions to listen to later

However, unlike Zoom, there is no option to split people into breakout rooms

## **Skype**

Skype was the least favoured of the three platforms currently being used most often by members. It was felt that it had become unreliable in terms of call quality and reliability.

## **Other platforms used for discussions**

- Some members had used various **webinar platforms** for involvement meetings. These give structure through presentations and there is an option for typed chats and breakout rooms for actual chats. However webinar platforms did not feel very involving - they are perhaps more useful for training.
- A few people use [google hangouts](#) – this platform was felt to be useful for smaller online meetings.
- You can use [WhatsApp](#) for video calls for up to four people, so it's great for small meetings, as so many people are familiar with it. WhatsApp was felt to be good for involving young people and for more informal situations.

- [Houseparty](#) is another video chat option, which could be used with a locked room – but we were concerned about security when using this platform.
- Cancer Research UK is currently exploring [Revelation StudySpace](#). It's an interactive platform for online focus groups.
- [Daily.co](#) is another video calling platform, good if you can't afford Zoom.
- Both **Facebook** groups and live chats have been used by members for involvement meetings and discussions online. Live chat was felt to be useful for small groups – but it's harder to manage big groups in this platform. Some members had had a limited uptake when they used closed Facebook groups.
- RNIB uses **Workplace**. It's very similar to Facebook (and was designed by Facebook), but it's a more professional platform. Within Workplace you can set up a multi-company group which enables people within your organisation/charity to interact with service users. You can:
  - Share posts, schedule posts and save draft posts for later. People can like and comment on posts so you can gauge levels of interest. And you can see how many people viewed a post.
  - Share files, photos and videos.
  - Make live videos
  - Run quick polls.

There's a group insights function which lets you see lots of different data about the interactivity of your group e.g. top contributors, top posts, membership, how many posts/likes etc.

### Other platforms used

- [Miro](#) is an online collaborative whiteboard.
- [Mural](#) is a digital workspace that has been used for sharing ideas through ideas boards.
- One member was trying **Instagram Live** to see how this worked.
- [Anchor](#) enables you to create podcasts – it's free to use, good quality and people can dial in to use it.
- [Pinup](#) enables you to create virtual post-it notes

### Platforms used for surveys or polls

- [Quicksurveys](#)
- [SurveyMonkey](#)
- [Microsoft forms](#) – members felt that these surveys were accessible and easy to use
- [Google forms](#) – this has a quiz function too
- [Kahootz](#) – a fun way of doing an online quiz where you can ask questions and people have a time limit to share their responses

- [Slido](#) – great to use in face-to-face meetings for polling and online Q&A
- [UsabilityHub](#) – good for quickly testing visual materials
- [MentiMeter](#) offers live responses and you can see word clouds and charts in real time. People can use their phones, iPads and computers to access these.
- [Decipher](#) – offers a broad range of question types and the option to add videos

## **Our top tips for involving people online**

### **Online meetings**

#### ***Preparing for the meeting***

- Run a virtual meeting just as you would a face-to-face one. Email invites and guidance on how to join the meeting, and any other items like the agenda or pre-reading.
- Test the platform with people so that they can practice and gain confidence. Share screenshots so they can have a visual guide to refer to.
- Ask people to join a few minutes before in case there are any technical issues. Have a list of participants' phone numbers so you can call them in if they're having issues.
- Put together some internal guidance for staff and guidance for customers
- Make a list of questions or prompts to facilitate discussion and to ensure the session has a clear purpose
- Try to have at least two people to facilitate the session – one to chair and one to provide technical support. If you are taking notes of the session, get someone else to do this.
- Have clear guidance and rules provided ahead of time for the format you are using
- Make a list of participants so you “know” your audience and can be prepared
- Be flexible with times of activities – offer a choice where possible
- Think about safeguarding issues: ensure there is monitoring and an agreed process for dealing with disclosures etc. (again this is why it's better to have at least two facilitators supporting the activity)
- If you are planning breakout rooms, ensure you have facilitator for each room
- Make sure that the technology is not a barrier to involvement – adjust your approach accordingly

#### ***During the session***

- Make sure you welcome people
- Do an introduction and run an ice breaker.
- Find ways to make people comfortable – introduce fun interactive elements

- Make people aware of the chat functions and how they can join in
- Record the meeting so you can spend more time listening rather than making notes.
- If it's a long meeting, consider breaking it up or offering a coffee break halfway through.
- Try to think of quieter members and ensure everyone gets involved – encourage the chat function to be used
- Avoid overwhelming people with too much tech and limit the amount of tech you're relying on, including PowerPoint. Keep it simple!
- Ensure you facilitate well so that all involved can speak up and have their say
- Always consider safeguarding during the main session and in break out rooms
- Use online polling during sessions to see how they are going

### **Online forums**

Thanks to Charlotte Jones from RNIB for sharing these tips about what to consider if you're thinking about setting up an online involvement community/group/forum:

- Personalise posts, be friendly, share a little about you – you'll find that people are more likely to get involved if you do this
- Depending on how many opportunities you have to share, try to post daily or every other day – if you don't plan to share every day make sure to let your members know what to expect
- Always try to share feedback – it's easy to get in a cycle of share, share, share and not giving back. We've learnt that the people we support love hearing feedback about their involvement – we've started Feedback Friday.
- Re-share posts about live opportunities in case people missed them – try doing a round up at the end of week/fortnight /month.
- Be responsive. People may have questions based on posts - try to reply to their comments or include an email so people can email you with questions.
- Sometimes it can be a quiet week, so have some back up content in case. I share a useful link from our website or a story from someone we support.
- Ask some of the people you support to be moderators in addition to yourself – they have the same lived experience so may be able to respond to a query better than you - and of course, it is involvement in itself!

### **The future**

Will we continue involving people virtually when the pandemic is over? The consensus was that we would, but that face-to-face involvement will always be important – the benefits of people interacting in person can't be replicated online.

## More information

Members had found the following guidance helpful:

- The Charities Research Involvement Group has written up guidance on running a big interactive meeting via Zoom – it's on the Shared Learning Group's [homepage](#)
- [Sessionlab](#) has produced a great resource that lists 25 free online tools to help you to run online workshops – it's [here](#)
- The NIHR School for Primary Care Research has produced guidance entitled 'how do I hold a PPI meeting using virtual tools?'. This can be downloaded [here](#).
- RNIB has produced guidance for staff on using Teams to run virtual meetings with people.
- Great detailed guidance on running a web meeting is [here](#)
- Useful general guidance by the UK Government on conducting user research during the pandemic is [here](#)
- Futuregov has guidance on making design research work remotely [here](#).

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[www.slginvolvement.org.uk](http://www.slginvolvement.org.uk)

**Thanks to everyone who shared their experience at our meeting:**

<b>Name</b>	<b>Organisation</b>
Charlotte Austin	British Lung Foundation
Laura Elliot	Marie Curie
Lucy Flegg	Shelter
Emma Friend	St Mungo's
Susanna Glover	Breast Cancer Now
Chloe Goldman	British Heart Foundation
Sarah Hall	Just for Kids Law
Bec Hanley	Shared Learning Group facilitator
Grace Harington	Bloodwise
Ruth Holtom	Safe Passage
Charlotte Jones	RNIB
Rachel Key	Versus Arthritis
George Lankester	Alzheimer's Research UK
Andy McGowan	Caring Together
Lydia Morgan	Young Women's Trust
Matt Murray	Versus Arthritis
Sadie Myhill	Cancer Research UK
Jess Rich	Stroke Association
Jenny Robertson	MS Society
Amy Rosa	St Mungo's
Carla Rose-Hardman	National Deaf Children's Society
Emma Rushton	MSA Trust
Holly Swinckels	Macmillan Cancer Support
Suki Westmore	Mind
Gemma Winsor	Crohn's and Colitis UK