APPENDIX D: VIRTUAL ENGAGEMENT GUIDE

Overview

This guide was developed to document the process used to plan and produce virtual panel discussions that aired live on Facebook as part of the 2020 SCAG Mobility Innovations and Congestion Pricing (MIP) project. While it is intended to provide detailed instructions, the technical accuracy of the Zoom and Facebook Live instructions may change over time as these platforms get updated.

Given the challenges presented by the COVID-19 pandemic in conducting in-person community engagement, the project team and Community-Based Organization (CBO) partners successfully pivoted to producing live virtual events. Although virtual events can be less accessible to some communities due to lack of access to the internet and computers or smartphones, the project team made a concerted effort to reduce barriers to participation.

The CBOs recognized that using virtual environments for community engagement events makes access to them inequitable due to the digital divide. For this reason, and in order to make these events as accessible as possible, the CBO partners felt that broadcasting via Facebook Live to the CBO's home page would be most appropriate for their audience. For the CBOs' communities, Facebook was the social media platform with the fewest barriers to access. The site's ubiquity, familiarity, and ease of access made it their top choice to reach their communities.

However, producing directly on Facebook Live has limited functionality in terms of how many videos can be on-screen at once and the level of control of the project team to coordinate technical aspects on the back-end. As such, the team utilized Zoom as the primary platform for the panel, which can be thought of as the green room, while Facebook functioned as the place where the panel was broadcast and where the audience could watch and engage.

To ensure language accessibility, the project team incorporated Spanish interpretation via a conference call number, ASL interpretation within Zoom, and Closed Captioning via StreamText, a text platform that delivers real-time captions. See the Language Accessibility section below for more information on these elements.

Roles

The core project team served primarily a technical and production role, while the CBO partners led on identifying panel topics, themes, panelists, and moderators, as well as conducting outreach and promotion. This guide will focus on the roles of the core project team members.

Showrunner

This person coordinates and communicates with all team members to ensure a smooth production. Ahead of any run-throughs with facilitators, panelists, or interpreters, the Showrunner develops a variety of documents to help guide them. These include a cue sheet, a list of technical steps, a script, and a template for participant questions. For more information on these, see the Guiding Documents section.

The Showrunner acts as the primary timekeeper and makes sure all the pieces come together and that all team members understand their role and get the support they need to fulfill that role. They direct the Technical Producer I (TPI) when to initiate various steps as the technical host of both the Zoom meeting and the Facebook Live video, such as taking the correct people on or off camera and audio, ensuring the video is being recorded, and initiating the live stream to Facebook. They communicate via text or the Zoom chat box.

The Showrunner also coordinates closely via text with the Technical Producer II (TPII) to make sure everything on Facebook Live runs smoothly, especially in the chat box, and that the Spanish interpreters and closed captioners have accessed the live video. The Showrunner retrieves Facebook audience chat box questions from the TPII via a shared participant questions document. After the TPII pastes questions into that document, the Showrunner can reframe or edit questions if necessary (i.e., if the question is confusing or not clear). From there, the Showrunner copies the questions into the Zoom chat box, where the panel facilitator then audibly relays them to panelists.

Finally, the Showrunner is supported by the Technical Producer III (TPIII) with timekeeping, providing a second set of eyes on the cue sheet and technical steps, and troubleshooting issues that may arise with the Spanish interpreters or closed captioners. They communicate via text or the Zoom chat box.

Technical Producer I

This person acts as the technical Host of the Zoom meeting, allowing them to mute/unmute all participants in the Zoom meeting, hide/unhide participants, and initiate live streaming to Facebook. The TPI must also be an administrator on whichever Facebook page the video is hosted. The TPI is behind the scenes in the Zoom meeting and the Facebook Live video the entire time.

Before initiating the Facebook Live video from Zoom, the TPI turns off the video and audio of all facilitators, panelists, and project team members in Zoom, except for the TPIII. In order to display a welcome screen, the TPI enables the TPIII to share their screen. This allows the TPIII to pull up a welcome screen slide in display mode. The TPI then hits the Record button in Zoom, initiates the stream to Facebook Live, chooses the correct Facebook Page to stream to, enters a name and description for the Live Video back-end, and then clicks "Go Live" on Facebook. Once the video is up on the page, the TPI keeps that browser window open (with the video muted) for the duration of the production, until the Showrunner directs them to end the Live video stream.

As the initiator of the Facebook Live video, the TPI has certain controls with regard to chatbox moderation, including the ability to hide and delete comments, as well as ban problematic commenters. If the TPII identifies an inappropriate comment or if a commenter posts multiple inappropriate comments, the TPII alerts the Showrunner and TPI. Depending on the situation, the Showrunner will instruct the TPI to either delete the comment or ban the commenter. See the Facebook section below for more information. The TPI communicates with the Showrunner via text or the Zoom chatbox, and with the TPII via text.

Technical Producer II

This person manages the Facebook Live chat box and must be an administrator on whichever Facebook page the video is hosted. Once the Live video appears and begins on that page, the TPII enters the chat box and "pins" a message instructing viewers how to engage. An example of this is, "Moderators may block commenters that use inappropriate language. For closed captioning, copy-paste [URL] into a separate browser. // Los moderadores pueden bloquear a los comentaristas que utilicen lenguaje inadecuado. Para audio en español, llame a [###]."

During the production, the TPII is on Facebook the entire time

(rather than Zoom) and communicates with the Showrunner and TPI via text. The TPII is focused on monitoring the chat box, which includes watching for audience questions that can be shared with the facilitator and panelists, as well as any inappropriate comments. The TPII reminds the audience throughout the production that they can enter their questions into the chat box, and copies any of those questions into a shared document with the Showrunner.

The TPII reports any inappropriate comments to the Showrunner and TPI, so that the TPI may block that commenter. In the event that this occurs, the TPII lets the audience know in the chat box. An example of this message is, "The comment above has been removed by the host; if you'd like to remove it from your chat window, please refresh your browser. // El comentario anterior ha sido eliminado por el anfitrión; si desea eliminarlo de su ventana de chat, favor de actualizar su navegador."

Technical Producer III

This person supports the production team as a floater, a timekeeper, and by providing a Welcome Screen at the top of the show. Due to the nature of live events, it is advisable to build redundancy into roles as a contingency in case a disruption occurs. While the Showrunner is also monitoring timekeeping, it helps to have a backup. Similarly, the TPIII can help troubleshoot issues that may arise with the Closed Captioner or Spanish Interpreters on Facebook while other project team members are busy with other tasks. The TPIII is primarily behind the scenes on Zoom throughout the event (though may need to join Facebook if issues arise) and communicates with the Showrunner via text or the Zoom chatbox.

Tools and Technology

Zoom

In order to broadcast the panel from Zoom to Facebook Live, the project team used the Pro level of Zoom, which allows for meetings to be streamed directly to social media channels such as Facebook and YouTube. TPI played the role of technical host in Zoom, allowing them to control the audio and video of panelists and project team members, as well as to initiate streaming. One challenge that should be accounted for, especially in terms of interpretation, is the roughly 20-second lag between Zoom and the Facebook Live video. Due to the confusing nature of this, it is advisable to limit the number of team members toggling back and forth between the two platforms.

Facebook

Streaming a Zoom meeting to Facebook Live works by hosting it in a particular "place," such as an organization's Facebook page. Since the virtual events produced for the MIP project were intended to be led by CBOs and directed to their respective audiences, the project team decided to host the Live videos directly on the CBO's Facebook page. This required getting permission from the CBOs to add the Showrunner, TPI, and TPII as administrators to their page. However, if the agency intends to produce Facebook Live videos on its own page, this step is not necessary.

In terms of comment moderation in the chat box, Facebook page administrators and Facebook Live hosts (i.e., the TPI) can hide and delete comments in the chat box, as well as ban commenters. However, viewers do not see these get deleted or hidden unless they refresh their browser. Although problematic comments and commenters were not an issue in the MIP project, the team developed boilerplate language which the TPII could enter into the chat box. See the Technical Producer II section for sample language.

In addition to the 20-second lag mentioned above between Zoom and Facebook Live, project team members that do toggle between the platforms should be careful with their audio settings. Specifically, when opening or expanding the Live video within Facebook, the audio automatically turns on; unless computer audio is muted when this happens, the audio from the Live video will be heard within the Zoom meeting and create confusion. Again, the number of team members toggling back and forth between the two platforms should be limited to two or three people in order to reduce the potential for mistakes like this.

Start Meeting

Spanish interpretation for the event was provided through a conference call service called Start Meeting. Importantly, this service allowed for two meeting co-hosts (the team of two Spanish interpreters), as well as muting all callers. The project team set up the conference number and trained the interpreters on how to use it. On the audience end, viewers on Facebook Live simply call the number and listen in while watching the video. The project team included a note to instruct viewers about this in the description of the Facebook Live video.

Given the constraints of streaming Zoom to Facebook, specifically the approximate 20-second delay, the project team determined that the simplest way to coordinate the timing of Spanish interpretation was by having the interpreters work from the front end. In other words, the interpreters logged into Facebook to watch the live video and interpret from there. This ensured real-time captioning from the audience's perspective.

StreamText

The closed captioners arranged for the captioning technology, StreamText, a text platform that delivers real-time/live captions, and can be accessed by a single web page. The project team provided a StreamText link to viewers in the Facebook Live video description, and encouraged them to open it in a separate browser. Users can view the live video in one browser and the captioning in a second browser, ideally situated side-by-side.

There are multiple ways to integrate captioning technology into live videos. The added step of opening StreamText in a separate browser may be considered a drawback in some ways. However, it also allows for participants to modify the size and color of the captions, and ultimately served its purpose effectively for this project.

Given the constraints of streaming Zoom to Facebook, specifically the approximate 20-second delay, the project team determined that the most simple way to coordinate the timing of captioning was by having the captioner work from the front end. In other words, the captioner logged into Facebook to watch the live video and caption from there. This ensured real-time captioning from the audience's perspective.

Language Accessibility

When planning for language accessibility for a live event, virtual or in-person, it is important to budget for the time of the event and the time of the run-throughs. Interpretation and captioning companies often prefer to schedule more than one interpreter or captioner if the event runs longer than one hour to reduce the likelihood of fatigue and mistakes. Similarly, it is often difficult to book them for run-throughs unless they will be compensated for that time.

Spanish Interpretation

A team of two Spanish interpreters provided their services via conference call (StartMeeting) and interpreted directly from the Facebook Live video. They developed their own system for taking turns during the event. Because they were already using their phones for the conference call, the project team communicated with them via email and Facebook chat for any issues that arose during the event.

ASL Interpretation

A team of two American Sign Language interpreters provided their services within Zoom and switched being on-screen throughout the event. They developed their own system for taking turns and switched their own videos on and off (rather than relying on the TPI to do it for them). They communicated with the project team via the chat box in Zoom during the event.

Closed Captioning

One closed captioner provided their services via StreamText and captioned directly from the Facebook Live video. The captioner communicated with the project team via Facebook chat during the event.

Run-Throughs

The project team conducted at least one run-through prior to each event with all facilitators, panelists, interpreters, captioners, and any other team member with an active role. If working with a new team of interpreters and captioners for the first time, a run-through focused on their roles and integrating the technology they will use can help focus the conversation and make the most of their time. In addition, holding separate run-throughs for the interpreters/captioners versus the facilitators/panelists can allow for the latter group to quickly review any technical issues and focus more on the content and questions of the panel. Prior to any of these, the Showrunner and Technical Producers should conduct many run-throughs among themselves to experiment with the various platforms and get comfortable using them.

One thing to note is that Facebook Live does not allow for a test or private function. To work around this, the project team went Live on Community Arts Resources' Facebook page and included "Test" in the video description. Another option would be to create a fake Facebook page that is accessible only to the Showrunner and Technical Producers, and conduct run-throughs on the "fake" page, rather than on SCAG's real Facebook page.

Guiding Documents

Technical Steps

This document should articulate most if not all steps to be taken by the Showrunner and TPIs, as well as all other project team members with an active role, during the live event. This helps to clarify the sequence of steps and who has ownership of them. Reviewing them together during the run-throughs can ensure a shared understanding of what to expect during the production. If using a document sharing platform such as Google Drive, linking to the other guiding documents can help simplify access to them.

Cue Sheet

This document provides a quick overview of the production, including major steps or tasks, time, and persons involved. It also has a second tab with project team roles, names, and contact info. It can serve as a high-level, quick reference for all team members, and should also link to the other guiding documents.

Script

A baseline version of this document should be developed by the Showrunner (and any other project team member involved in curating the content of the virtual event) prior to the run-through with facilitators and panelists. During the run-through it can be vetted and modified as necessary with input from the facilitators and panelists. It should also include time markers to help with timekeeping.

Participant Questions

This document will be updated live during the virtual event by the TPII and Showrunner with any questions that the audience poses in the Facebook chat box. The Showrunner may edit them there if necessary (for example, if the language is confusing) before handing off to the facilitator in the chat section of Zoom. Again, it is important to emphasize to facilitators and panelists during the run-throughs that they will need to pay attention to the Zoom chat box in order to see these questions and for any other directions from the Showrunner. Depending on the audience, it may also be necessary to translate questions from another language.

Sample Technical Steps for Live Virtual Events

1. All join Zoom meeting and do introductions. Showrunner leads the group through steps.
2. Review roles, tech tools, and how/where the audience will view/listen/participate. Facilitators, panelists, and ASL interpreters add names/titles/pronouns to videos.
3. Review Cue Sheet, Participant Questions, and Talking Points.
4. Assume positions

   i. TPII leaves Zoom, opens the correct Facebook page, and waits for the live video.
   ii. Spanish interpreters start conference call as hosts, mute participants, leave Zoom, and go to the correct Facebook page to wait for a live video.
   iii. Closed Captioner sets up StreamText, leaves Zoom, opens correct Facebook page, and waits for the live video.
   iv. TPI hides all videos except TPIII; TPI enables TPIII to share screen and hits Record on Zoom.
   v. TPIII shares screen and pulls up welcome slide in full screen/presentation mode.

5. TPI triggers the Zoom meeting to go Live on the correct Facebook page.

   i. While in preview mode on Facebook:
      - TPI adds a title in English and Spanish for the Live video
      - TPI adds a description in English and Spanish for the Live Video
   ii. TPI selects Go Live in Facebook

6. TPII confirms seeing Live video to Showrunner and TPI via text. Below is a sample Facebook Live chat box language for TPII to pull from.

   i. PINNED: Moderators may block commenters that use inappropriate language. For closed captioning, copy-paste [URL] into a separate browser. // Los moderadores pueden bloquear a los comentaristas que utilicen lenguaje inadecuado. Para audio en español, llame a [phone #].
   ii. IF COMMENTER IS BLOCKED / COMMENT IS DELETED: The comment above has been removed by the host; if you'd like to remove it from your chat window, please refresh your browser. // El comentario anterior ha sido eliminado por el anfitrión; si desea eliminarlo de su ventana de chat, favor de actualizar su navegador.
   iii. DURING Q+A: Enter your questions for the panelists in the chat box! // ¡Ingrese en la ventana de chat sus preguntas para los panelistas!

7. Spanish Interpreters and Closed Captioner confirm they can see, hear, and open / expand Live video by adding a note to the Facebook chat box. TPII texts Showrunner and TPI to confirm this step is completed.
8. TPI adds videos of facilitators, panelists, and ASL interpreters, then takes down the Welcome Screen. TPII texts Showrunner and TPI to confirm this step is completed.
9. Showrunner instructs TPI to end the Live video on Facebook. Interpreters, Closed Captioner, and TPII re-join Zoom to debrief.

Sample Script

This sample script was taken from the event held in partnership with Southern California Resource Services for Independent Living.

1:00PM

- CBO Host: Hello everyone! Welcome to our live discussion, brought to you in partnership with SCAG! I'm [Name], [Title] at [Org]. Today's discussion will focus on [description]. Today's panel will be facilitated by [Name], [Title] with [Org].
- Facilitator: Thanks for the introduction! Before we get started, I want to remind everyone that you can leave comments and questions in the chat box below. Please be respectful of other commenters and our panelists. We will start off with a discussion among panelists, and then open it up to an audience Q&A session a little after 2:00p.
- CBO Host: Also, if you'd like closed captioning, please open the link in the chat box in another browser. Para audio en español, llame a (617) 829-7737.
- Facilitator: Today we have three panelists joining us, and we're so grateful to each of them for being a part of this. They are...
   - [Names], [Titles] at [Organizations]

1:10PM

- Facilitator: Alright, let's get started!
- [Question 1]: What does the ADA mean for you and your agency?
- [1:21P - Question 2]: How will the ADA drive your agency's innovation, rather than simply compliance, of meeting the growing need of accessibility and equity?
- [1:27P - Question 3]: How has COVID impacted mobility for people with disabilities?

1:30PM

- Facilitator: Now we're going to begin the Q+A session. Again, please comment in the chat box to ask our panelists a question!
   - Note: Showrunner and TPII coordinate behind the scenes on [link to Participant Questions]. Showrunner adds questions into the Zoom chatbox for Facilitator].

1:45PM

- Facilitator: We have time for one more question or comment from the audience.

2:00PM

- CBO Host: Thank you everyone for attending today. Thanks to our panelists, Access, Metro, SCAG, and to Ali Everett for facilitating.

Sample Participant Questions

Q #	Insert Question Text from Facebook Live Chat Box	Translation (if needed)
1	"I think Hector's point around accessibility in covid safe restaurant spaces is interesting and poignant, and represents another way that some of these temporary solutions are not fully in service to all members of our communities. I would be interested in learning more about ADA appropriate 'guerrilla' responses to planning and transportation services that might be implemented more easily now during covid."	
2	"For each of you, Ali included, what is one opportunity in particular you see as a sustainable means to continue to build on and/or protecting the progress made per the ADA?"	
3	"With the heightened threats of natural disasters, more specifically the recent Fire dangers, how can we improve evacuations for those that require accessible forms of transportation for our most underserved communities?"	