Updated: April 30, 2020

VIRTUAL CO-CREATION TIPS/TRICKS, FAQs and ADDITIONAL CONSIDERATIONS

Watch and Listen to the March 19th webinar here and/or download the session slides here.
Part II to the March 19th webinar coming soon to a virtual room near you!

Additional Resources form our PDT Partner, CollaborateUp

- Formula for Problem Solving
- Virtual Meeting Best Practices
- Virtual Platform Comparison Table (Consult with CIO to ensure these platforms are acceptable or approved)

Considering conducting a virtual co-creation? Are there any steps you should take? Remember, co-creation, in general, is a design approach and is not a procurement mechanism. Therefore, should only be incorporated into the program cycle as appropriate (and it is not always appropriate)...whether that be in the competitive or non-competitive phase.

**Please do understand that co-creation in general may be new to many at USAID. The idea is to recognize that collective voices can add value to whatever the challenge/strategy/thought process, etc. may be. It affords that opportunity for transparent, collaborative and purposeful*

interaction. Remember whether in-person or virtual co-creation - transparency and managing expectations are key.

Q: How long do I need to prep and plan for an effective virtual co-creation workshop?
A: Depending on what your goals and outcomes are for the co-creation itself, you should add at least 2 to 3 more weeks to your co-creation timeline. This allows time for the facilitators to provide guides for the participants, determine best ideation exercises, and even give time to determine the best workshop platform. *Note that if you have less than 10 workshop participants, the timeline may not have to be extended*

Q: In order to make collaboration more effective, how many people are recommended in a "room?"
A: Having no more than 10 people in a virtual "room" would be ideal. However, there is no maximum or minimum participant limit (i.e., there have been some workshops with over 35). Keep in mind the reality of managing many voices. Similarly to in-person co-creation sessions, you have the ability to assign groups to virtual breakout rooms so that will help to break down into smaller groups if necessary. Be thoughtful about bandwidth, particularly in contexts with less developed Internet infrastructure. Forego video for audio if necessary.

Q: How can I document conversations within a virtual space?
A: Consider recording the virtual co-creation session. For instance, if you are using AIDConnect or Google Hangouts, both have recording options. A Google document is also an option, remembering that co-creation does not necessarily end at the conclusion of the session. Ensure transparency and clear guidance to participants. Share with your A/CO for documentation purposes.

Q: What virtual platforms can I use?
A: Choose an appropriate and approved virtual co-creation platform. AIDConnect/Adobe and Google Hangouts are among the approved platforms. Keeping in mind that Google Hangouts are not accessible to the public. Currently, USAID is not approved to use the Zoom conferencing platform for co-creation.

Q: Are the 5Ws still an important part of my decision making process in whether or not co-creation is appropriate...even if done virtually?
A: Absolutely! You must still be able to answer those key questions in determining if co-creation is appropriate and if it is, stakeholders questions as well as when the workshop will take place are just as important.

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Q: We've already created an agenda/framework for the in-person workshop. How can I go about making it virtual?

A: Review the agenda and consider whether or not a virtual co-creation is even right for you and your team. However, be flexible and prepare to move sessions around or remove entirely. Your agenda may not be structured like that of your in-person workshop. There may be co-creation methodologies that you originally planned to use, that can be adapted/modified to suit a virtual environment for your desired outcome. Be sure to assign roles similarly to an in-person meeting, such as facilitators, your tech person, note takers, speakers, chat monitor, participant assignments, etc.

Q: I had planned a two-day workshop. I'm now moving to an online format. How long should the event run?

A: Consider a five-day event, with workshop activities not taking more than a half-day daily. Consider stretching out sessions, as well - i.e., if you had planned 60 or 90 minutes for a small group breakout session, perhaps give participants two to three hours with an assumption that they'll have connectivity issues, need breaks, want to work offline at times, etc. Remember, co-creation is meant to be innovative and flexible. On the other hand, you might also find that after reviewing your agenda/framework, a shorter time period is only necessary and your two-day workshop is now a half-day workshop!

Q: I was planning a low-tech workshop -- i.e., butcher paper and magic markers… How do I keep things simple moving online?

A: We don't need to use fancy technical applications to achieve our objectives. Keep things simple. For example, treat Google Docs as virtual butcher paper. Participants in small group sessions can contribute, and groups can share links during plenary sessions for comment - directly or via chat. As in a physical setting, where papers cover the ballroom or conference room walls, ensure all Docs are available for all to see at all times.

Q: My workshop was going to be plenary heavy with a lot of discussion. How do I achieve this virtually?

A: Try, for example, substituting a conversation about gaps, challenges, and opportunities by collecting words/phrases from participants in advance using Google Forms. Then, create Word Clouds for free online - and post these to inspire creative thinking. People can respond through audio/video or chat.

Q: The most important thing to me about co-creation is networking and playing the convening role for many new organizations! How do I do it online?

A: Have you considered soliciting ideas from participants about the people and organizations they'd like to meet during co-creation - even if online? Play "Development Tinder" by asking participants through Google Forms for information on their ideal matches --- where do they work, what do they work on, what are their values and experiences? Event organizations can then group organizations in small-group and networking settings to get to know each other. Create as many virtual "rooms" as possible for people to use, moving in and out of some while having fixed spaces for pre-organized groups.

Q: How do I simulate the physical breakout rooms that we typically do in-person?
Consider using one platform as the plenary room and opening up a new breakout room(s) using the same or a different platform. For instance, depending on what your plans are for that session, have two AdobeConnect rooms with co-facilitation happening simultaneously. It helps to break down larger groups into smaller ones so you can have more detailed conversations or a more intense and interactive ideation or brainstorm. There are numerous ways to simulate breakouts so please work with your facilitator or tech help to make this happen for you.

Q: How do I stimulate robust conversation/discussion if I have a large group in my co-creation workshop? Let's say I have about 40 participants. How would that work?
You may want to consider having smaller breakout groups. Instead of splitting them in half, have smaller groups focus on a particular topic or area. While you may need additional virtual rooms and co-facilitators, this may be the best way to stimulate that conversation where all get a chance to participate.

The Five “W”s

WHY?
Intentions and
Anticipated Outcomes

Who?
The stakeholders

When?
Is it in 2 weeks
or 2 months?

WHAT?
This is for...

Where?
Location

MOAA PDT Professional Development & Training

The Five "W"s (cont)

Why? - What is your intent? What outcomes, what results do you anticipate from this workshop? What do you intend to achieve at the end of this process? Why are you co-creating? Besides identifying "what" you'd like to co-create, are there other reasons you're motivated to use this approach? Can you build those elements into your co-creation experience? Do you have any constraints (budget, time, staff) that are at odds with those goals?

What? - For what? Is this for a design, industry day, procurement, team building? What are you trying to co-create? A partnership, a new solution, a collective approach to address an issue, a problem statement?

Who? - External or internal? Who are the stakeholders? Who be involved in your co-creation process? Who else is interested in this outcome who might be a partner? Whose actions are you trying to incentivize? Who will facilitate the interactions?

When? - Is the timing doable? Will the timeline allow for proper preparation? When would be the ideal time to convene the interested stakeholders? Do you need multiple engagements or can your objectives be addressed in one event?

Where? - Geographic location is important too; Where will you engage others? Can you do this locally or would travel or virtual engagements be required?

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Virtual Meeting Best Practices

As many collaborations and meetings move online, we will encounter inevitable obstacles and growing pains. But whether you're planning an internal company meeting or convening partners across sectors, practicing a few foundational behaviors will help make your meetings more productive and seamless. For information on how CollaborateUp can help, check out our service menu and education offerings.

Participants

It takes more than a good virtual platform and facilitator to make a virtual meeting work. Participants also need to adjust their behaviors. As the participant, model these behaviors. As the facilitator, communicate these expectations clearly, prior to meeting.

- **Bring patience and humor.** We're all in this together. Don't create 'mute button anxiety.' Be patient as people navigate new systems and don't be afraid to make fun of your own foibles, it puts everyone at ease.

- **Know your equipment.** If you're joining on a phone, laptop or other device, be sure you understand how things work on the equipment you're using. Don't be afraid to try a test run.

- **Make time for testing and updates.** If you are using an unfamiliar platform, sign on early. Test your sound. Download the app (if needed) before the meeting begins. Be ready so you don't waste others' time or miss something important.

- **Work from home but dress for work.** Wearing pajama pants is up to you, but be ready (at least from the waste up) to be on camera. Turning on your video is the new normal and it helps meeting facilitators and fellow participants see and understand you better. Most of our communication takes place through facial expressions and body language so don't put yourself or others at a disadvantage by not showing your face. Looking professional shows others the meeting is important to you.

- **Take it seriously** – avoid the temptation to multi-task. Research shows our attention veers off nearly every 6-7 minutes when we're online. While it's the facilitator's job to design an engaging meeting, it's your job to stay focused. Avoid checking email or performing other tasks while in a virtual meeting – it drains your attention span and sucks up precious internet bandwidth.

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Facilitators

- **Bring patience and humor.** As stated above, we all need a bit of patience right now. Cut yourself and participants a bit of slack as we get used to spending our work lives online. Use humor to reduce anxiety and don't be afraid to make fun of your own mistakes—we're all learning.

- **Plan different and deliberate.** Virtual meetings take even more planning than an in-person meeting. Rather than full days like you might have in-person, you'll need to break up virtual meetings into shorter bursts that take place over more days. Social norms around virtual meetings are changing—we've seen successful virtual meetings of up to 4 hours (which would *NEVER* have happened a few months ago). Much beyond 4 hours in a row is too taxing. Virtual meetings must balance the right amount of engaging activities to keep things fresh with adequate time and focus to achieve meeting goals. Using polls, the chat box, and breakout sessions can all help, but don't give participants whiplash by doing too much.

- **Encourage the chit-chat.** In a virtual meeting you lose the advantage of face-to-face communication and the connections that are often built during tea breaks and networking sessions. But it doesn't mean you can't get close. Open the meeting early and turn microphones on so participants can chat about the weather or homeschooling woes before the meeting starts. Allow people to use the chat box to discuss meeting-related topics as well as tangential issues. Orient participants on how to use the chat box, both to chat to the entire group, as well as to send private messages.

- **Designate a techie.** Just like you would have for an in-person meeting, a facilitator needs support in a virtual meeting, specifically someone dedicated to solving technical issues. This person can mute noisy participants, monitor the chat box and solve other technical issues as they arise. This allows the facilitator to focus solely on managing the meeting.

- **Read new social cues.** As mentioned earlier, much of the way we communicate—and listen—is through facial expressions and body language. Encourage participants to turn on their video when they can, at least for introductions or if they are presenting something longer than a minute or so. This helps everyone better communicate. Use the 'social cue' tools available on your virtual platform, clapping, raising a hand, funny, happy, and sad emojis. All of this with help.

- **Allow for 'awkward silence'.** Don't be afraid of a few seconds of silence after calling on participants to speak or asking a question of the group. Sometimes people are just looking for the 'unmute' button. Sometimes they are just contemplating

the answer. Filling in the silence too soon can stifle conversations. It often takes participants a while to 'get warmed up' during in-person meetings; virtual meetings are no different.

- **Utilize platform functionality for interactivity and attention**. Experiment with the platform you've chosen. Almost all have stepped up their game these days and offer polling, chat functions, white boards and other interactivity. While you don't want to overstimulate participants, using these tools at the right time during your meeting can keep them engaged, interested and provide trends or temperature checks of the entire group.

A few words about **Breakout Sessions**.

Many of the virtual platforms allow for seamless breakout sessions – no need to dial-in and out. It will automatically bring participants in and out of breakouts and plenary (wish we could do that in real life!). We recommend:

- **Utilize breakouts, especially if you have a large number of participants**. Smaller groups allow for more in-depth discussion and can likely move things forward more quickly.

- **Have a facilitator in each group**. This is key to data and idea capture. We've had a facilitator open up a slide and share their screen, taking notes in real time, just like you would on a flip chart at an in-person meeting. GoogleDocs also work well for this. This also ensures the group will have something concrete to turn in or report on when they return to plenary.

- **Keep breakouts to between six and eight participants**, and try not to go larger than 10. Once the group begins to get too large, it'll be hard for the facilitator to keep track of everyone's comments.

- **Strategically plan a break after a breakout session**. This allows facilitators to clean up notes before going back to 'plenary'

- **Do report backs**. Just as they are key for in-person meetings, having breakout groups report out on their discussion can provide a jumping off point for further discussion or help move decisions forward. Try to have someone from the breakout session do the report back while the facilitator moves the slides. While most platforms allow for recorded meetings, many won't record breakout sessions. Be sure you check and document breakouts accordingly.

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Virtual Platform Comparison Table

To help you more effectively meet online, we compared a number of virtual platforms across functionalities. We've included some personal experiences and tips in the very bottom row. If you have experiences to share or platforms to add, please let us know! Email beth@collaborateup.com and we'll keep this tool free and updated on our website. Check out additional information on our virtual services. Happy Virtual Collaboration!

	Zoom	Google Hangouts	WebEx	Microsoft Teams (formerly Skype for Business)	Adobe Connect
Website	Zoom.us	https://gsuite.google.com/	https://www.webex.com/	https://products.office.com/en-us/microsoft-teams/group-chat-software	https://www.adobe.com/products/adobeconnect.html
Free Option	Yes	Yes	Yes	No	No
Free Option Participant Capacity	100	25	3	NA	NA
Free Option Meeting Length Limit	40 minutes (in meetings with more than 2 attendees)	24 Hours	24 hours	NA	NA

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	Zoom	Google Hangouts	WebEx	Microsoft Teams (formerly Skype for Business)	Adobe Connect
Professional Packages	4 pricing packages	Free	4 pricing packages	4 pricing packages	6 pricing packages
Maximum Participants	Up to 100 (up to 500 with Large Meeting Add-On)	Up to 50 (if you already have G Suite)	Up to 1,000	Up to 250	Up to 100
Platforms Supported	Windows, Mac, Android, iOS	Windows, Mac, Android, iOS	Windows, Mac, Android, iOS	Windows, Mac, Android, iOS	Windows, Mac, Android, iOS
Able to Attend Meetings in a Web Browser?	Yes	Yes	Yes	Yes	Yes
Call Recordings	✔ (won't record breakout rooms within a larger plenary)	No	✔ (won't record breakout rooms within a larger plenary)	✔ (won't record breakout rooms within a larger plenary)	✔
Screen Sharing	✔	✔	✔	✔	✔
Group Messaging	✔	✔	✔	✔	✔

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Polls	✔	No	✔	✔	✔
Whiteboard	✔	No	✔	✔	✔
Breakout Rooms	✔	No	✔	✔	✔
Encrypted Calls	✔	✔	✔	✔	✔
Personal Experience/ Tips	Poll function doesn't work through web browser; good balance of functionality and ease of use. Breakout rooms are great and seamless. Can automatically close breakouts and force people back to plenary. There have been some cyber concerns raised.	Can't record calls or do breakout rooms so limited capacity for larger, interactive meetings. But very widely accessible and easy to use	Used to be a platform of choice but many have moved toward Zoom and others. Still has good functionality. Considered by some to be more cyber-secure.	No free option and often difficult for non-Microsoft users to access files and outcomes stored through Teams	Currently used by USAID and other US government (USG) agencies so familiar to most USG participants; robust dashboards but can be overwhelming for new users

Mural (subscription based) and Miro (free) are two 'virtual whiteboards' that are specifically designed for remote creation, design sprints and ideation. They a require a bit more training (for which Mural has staff) and guidance before use, but you can use them in addition to the virtual platforms above to co-create using familiar brainstorming tools and templates.

CollaborateUp Formula for Problem Solving

Successful team collaborations to tackle organizational problems follow 6 basic steps.

INVITATION

Getting the right people in the room.

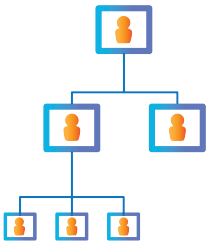
- Map Influencers
- Warm Invitations to Get the "Right" People
- New Connections

DATALAB

Getting those people to see the problems in the same way.

- Data, Facts & Science
- Same Page
- Falling in Love with the Problem BEFORE a Solution

TEAM COMMITMENT



Giving people time for their teams to decide if they're "in" or "out" and if "in" what they can bring.

- Resources
- Funding
- Support

PARTNERLAB

Reconvening in a set period of time to develop outcome-specific ways of testing concept solutions.

- Commitment
- Recruit Strange Bedfellows
- Brainstorm and Build Prototypes

LAUNCH

Launching prototypes with specific, testable outcomes:

- Prototyping diverse experiments
- Market-based Concepts
- Verifiable Outcomes
- Iteration rounds to determine what to move forward, what to kill

STORYTELLING

Collecting and spreading data in compelling ways that motivate action

- Best Practices
- Accelerating Adoption
- Recruiting New Players

Virtual Collaboration

Know when to hold ‘em

03.19.2020

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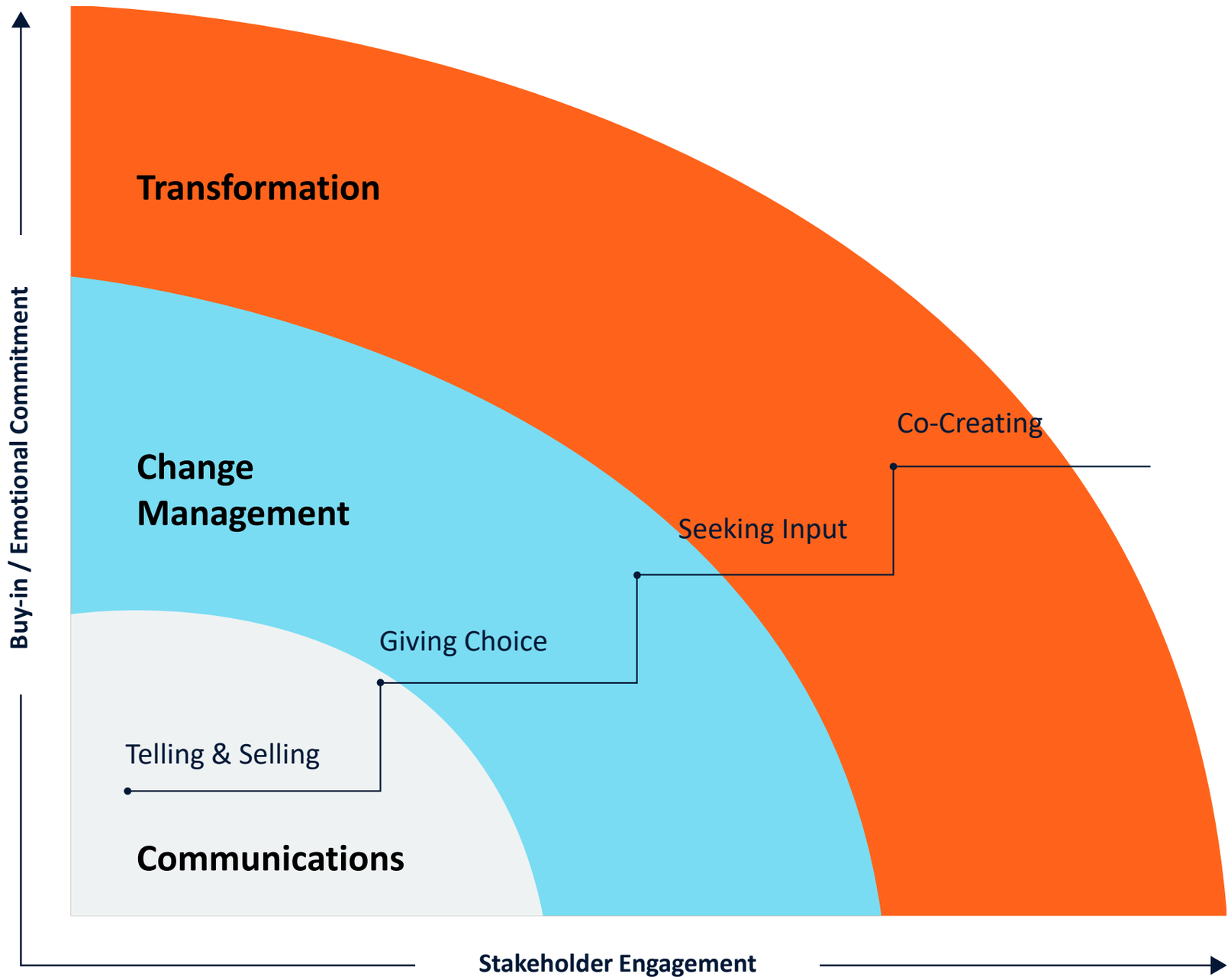
Webinar Agenda

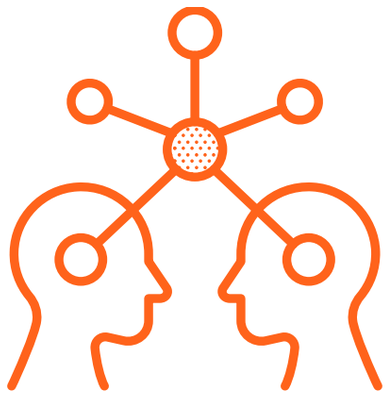
- Meeting Archetypes
- Group Dynamics and Active Listening
- Collaborating Online
- General Tips & Tricks for Virtual Collaboration
- Value of Professional Facilitation
- Interactive Q&A

Engaging Partners

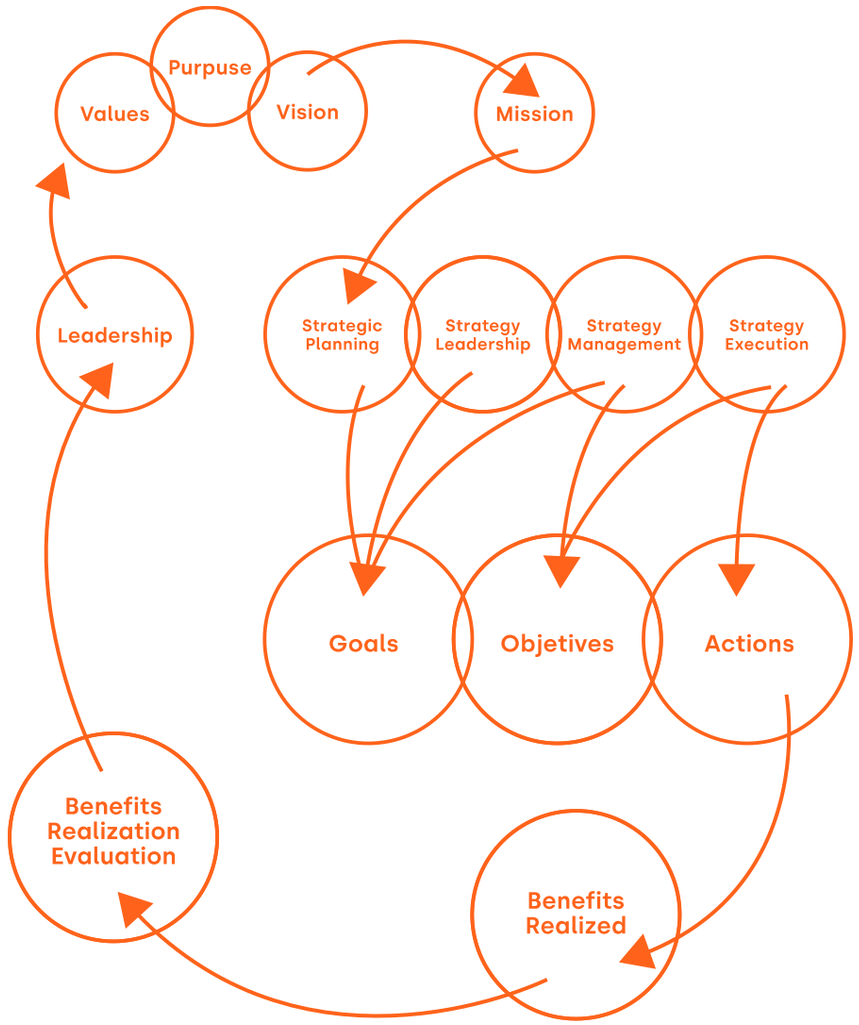


Virtual Collaboration

Meeting Archetypes

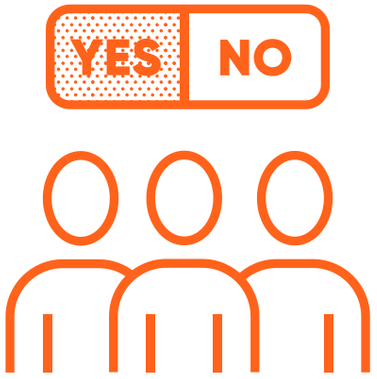


Info-sharing

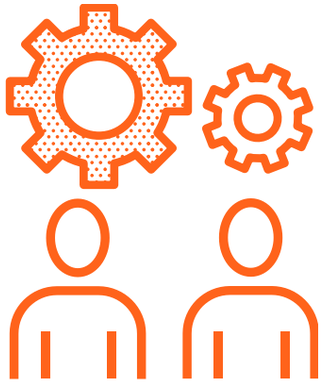


Planning

Brainstorming



Decision-making



Team-building

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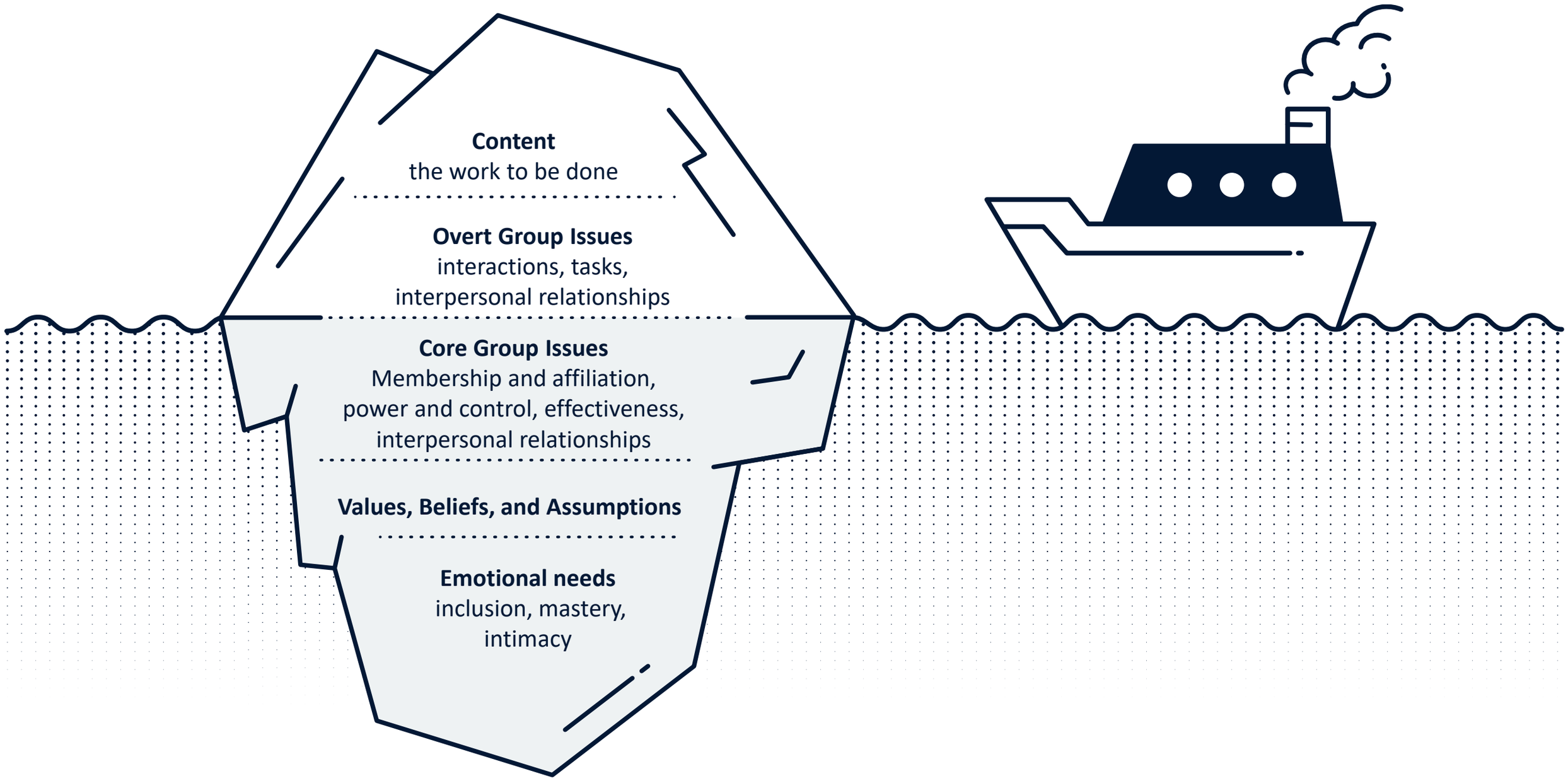
Group Dynamics



Active Listening in a Virtual Reality

Communication is:

- 55% Body language
- 38% Tone, modulation and rate of delivery
- 7% Words

Building a Virtual Co-creation Foundation

Participants

Bring patience & humor

Know your equipment

Leaving time for testing & updates

Work from home but dress for work

Take it seriously – avoid the temptation to multi-task

Building a Virtual Co-creation Foundation

Facilitators

Bring patience & humor

Plan different & deliberate

Encourage the chit-chat

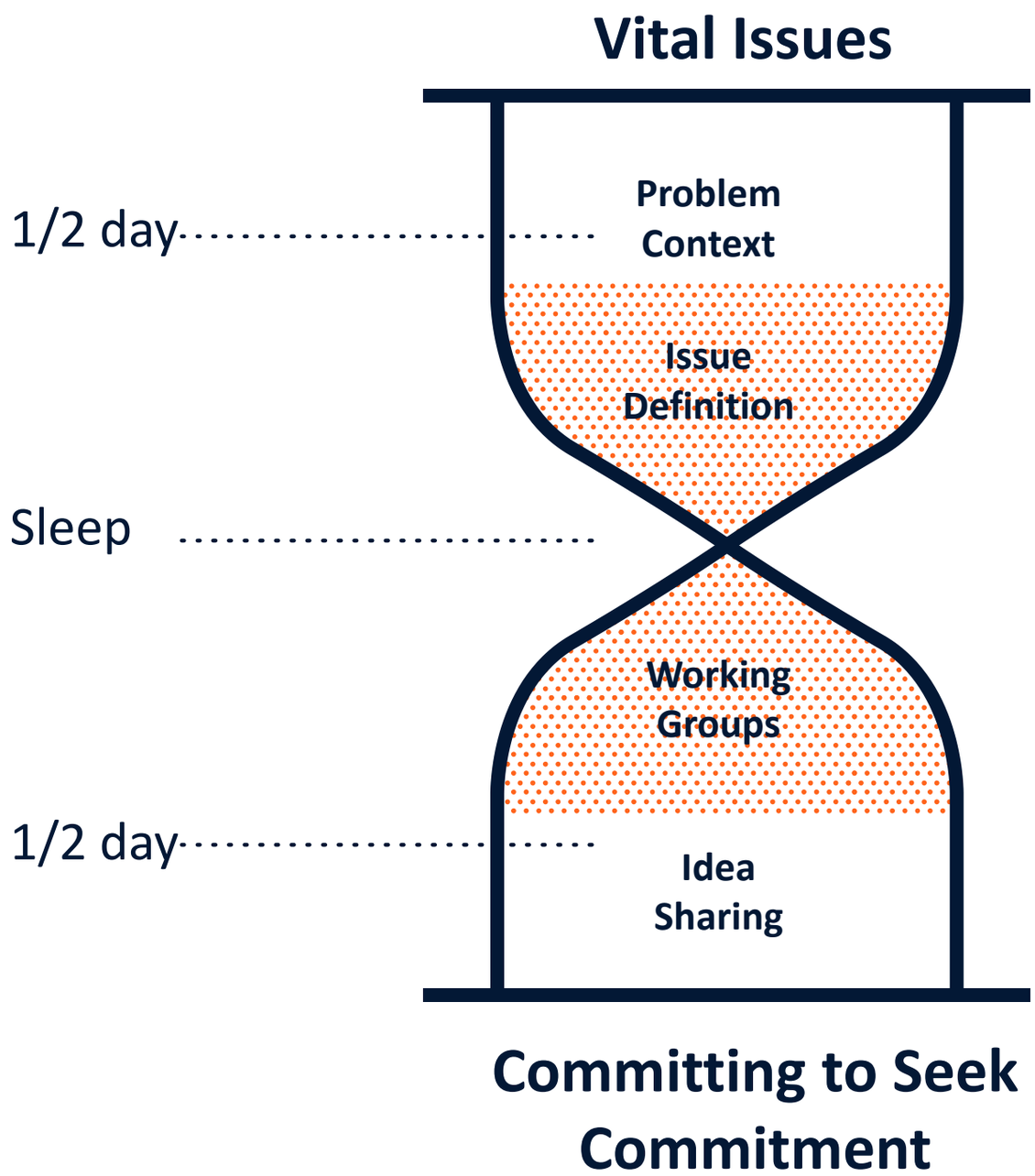
Designate a techie

Read new social cues

Allow for ‘awkward silence’

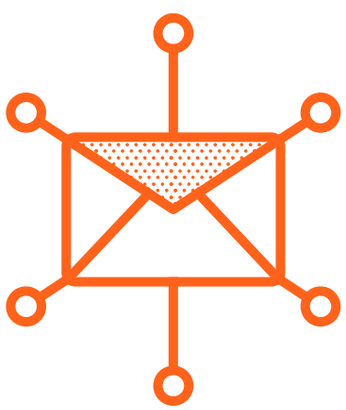
Utilize platform functionality for interactivity and attention

Session Flow & the Virtual Reality



CollaborateUp Formula

Steps for Successful Multi-Stakeholder Collaborations

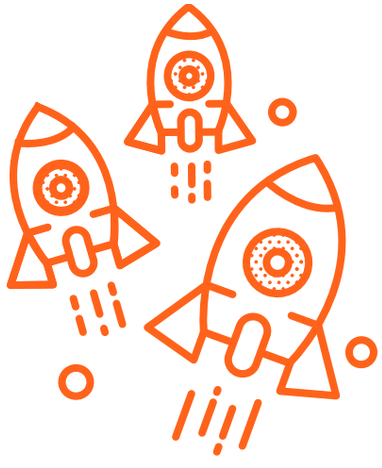


Invitation

DataLab

Institutional Commitment

PartnerLab



Launch

Storytelling

The Role of Professional Facilitators

Virtual Meetings Tips	What Facilitators Can Do For You!
Preparing for Virtual Meetings	
Design a Smart & Deliberate Virtual Meeting	•Work with you to develop and and format your meeting content •Design and structure an agenda based on intended outcomes •Design innovative and collaborative virtual activities to keep participants engaged •Provide end-to-end coordination and logistics support
Broadcast the Meeting's Intended Outcomes	•Craft an invitation that clearly defines intended outcomes and participant expectations •Help with meeting publicity and invite management
Select the Appropriate Virtual Meeting Platform	•Review available platforms and functionality with your team •Recommend the best option based to balance your needs, participant access and functionality
Learn the "Ins" and "Outs" of Your Virtual Meeting Platform	•Provide a tutorial on the interactive features of the virtual meeting platform (polls, whiteboards, breakout rooms, etc.) •Work with meeting organizers to ensure participants leave sufficient time for testing and updating, as well as software downloads
Support During Virtual Meetings	
Execute to Achieve Your Outcomes	•Reinforce the meeting's purpose to help keep the conversation on track •Provide h any combination of virtual facilitation options: • Option 1: Document the meetings and provide written meeting summaries • Option 2: Moderate discussions and conversation in plenary or breakout sessions • Option 3: Facilitate meetings as the host or co-host
Promote Collaborative Problem Solving and Discussion	•Lead and teach co-creation and co-design methods on any platform •Encourage collaboration, learning, and adaptation
Designate a Techie	•Provide tech support to ensure smooth operations while using the virtual meeting platform

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