

COVID-19 Virtual Engagement Process

Purpose: To provide staff members step-by-step guidance when planning virtual engagements activities with members of the public.

Step 1: Conduct community assessment – contact the organization, community or group of people who will be part of a digital engagement to determine if they have the following:

A. Technical resources

- Do intended participants have access to a computer, smartphone, or similar device?
- Do participants have access to an internet connection?
- If group members do not have internet access, is a phone number available for them to call to participate in engagement activity?

B. Technical Know-how

- Do participants have experience using digital engagement platforms?
- Are participants familiar with the basic computer processes that would allow them to access a digital engagement platform?

Step 2: Consult with Information Services Help Desk at HelpDesk@oregonmetro.gov to choose the appropriate web video conferencing platform.

Step 3: Consider accessibility needs when choosing a videoconferencing platform. Be prepared to use audio and visual accessibility features that are included in the chosen virtual engagement platform.

How to turn on closed captions in MS Teams

1. Enter meeting
2. Click on the ellipses (...) “More Actions” button on the meeting toolbar
3. Select “Turn on Live Captions” from the dropdown menu
4. Closed captions should appear at the bottom of the screen; they may take a few seconds to load

Step 4: Decide who will be presenting and who will be running the meeting and ensure staff have the necessary technology and training to successfully run the virtual engagement activity.

Step 5: Determine how to facilitate community feedback and participation using chosen digital platform. Make sure to set aside meeting time to demonstrate how to use platform’s engagement features.

Step 6: Carefully consider how best to publish or send meeting links to intended participants. It may be necessary to include detailed instructions about how to access the virtual engagement activity in meeting announcements.

Step 7: If the virtual engagement activity qualifies as a public meeting, it is important to remember that public meeting laws and regulations are still applicable. In addition, according to the Oregon State Legislature’s [House Bill 4212](#), all public meetings using telephone or video conference tools are required to be recorded and posted for accessibility by the public. Note, because of their short-term retention, recordings are not an acceptable substitute for meeting minutes.

Refer to Meeting Management Best Practices under “Additional resources” in the COVID-19 Community Engagement Procedure for guidance.

Contact the Records and Information Management team at RecordsManagement@oregonmetro.gov with any questions about creating, storing or retaining digital engagement records.

Step 8: Staff members should turn off chat during public meetings as these conversations are considered a public record.