

Designing for Purpose in Virtual Engagements

As we transition our working, learning, teaching, and community-building from the “real world” to the “virtual world,” we are faced with new opportunities, obstacles, decisions, and questions. One way to keep our bearings is by staying grounded in a clear purpose—and letting purpose drive our decisions. In this resource, you’ll find questions to help you navigate the needs of purpose, design, and technology, as well as a guide that identifies some qualities that each digital tool invites and discourages, and how it might align with your purpose.

Anchoring in Purpose

When Essential Partners works in a community or organization, we begin with a mapping and listening process. This is designed, in part, to help them arrive at a clear sense of purpose. We listen for the hopes and concerns that are driving the collaboration. Ultimately, we help the community identify their purpose more clearly. Without a clear purpose to anchor the work, it is easy to drift away from one’s mission, values, and goals.

Questions for Reflecting on Purpose:

- Why are we bringing people to the table? Who needs to be there?
- What hopes and concerns are driving the work?
- What is at the heart of the matter?
- What is the larger question we are trying to answer?

This particular moment of seismic change begs new questions:

- Do our purposes remain the same, with the same level of priority?
- If not, what are the values that are guiding us right now?
- What new priorities and purposes are emerging that align with those values?
- Where can we flex and adapt? Where are we unwilling to budge?
- How can we clearly communicate our adapted purposes to our stakeholders?

Re-Designing for Purpose

Every conversational arrangement invites some ways of being and discourages others. Knowing this, it’s useful to ask ourselves: what do we want to *invite* and what do we want to *discourage* and *why*? The *why*—our purpose—should drive all of our design decisions. Design includes all the structures, questions, processes, and exercises to support a particular purpose. But design is not limited to just what happens “in the room.” It also includes the choices we make about how to best prepare the facilitators, hosts, and participants.

Questions for Reflecting on Design:

- What kinds of participation, ideas, actions, emotions, or questions do we want to invite and/or discourage, in the service of our purpose?
- What kind of preparation and pre-work will best support our purpose?
- How will we structure introductions, content delivery, questions, debriefs, follow-up, etc. so that they are aligned to our purposes?

Leveraging Technology for Purpose

In all design decisions, we are building a “container” to hold the conversation. This container includes the purpose, structures, processes, and agreements that will support the conversation and participant engagement. In an online dialogue or workshop, it’s no different. We are building a “virtual container,” adding technological tools to our toolbox.

It is natural to feel intimidated by the learning curve of a new technology or overwhelmed by all the bells and whistles of video conferencing. Zoom, for example, has several features that can support participant engagement, including a chat box, polling feature, emoji reactions, a hand raise function, and breakout rooms. Each of these can be useful in their own ways but deciding which to use when and how can be a challenge.

In the last section of this resource, you’ll find a guide to the many digital tools that can be deployed in a virtual meeting or dialogue.

Questions for Reflecting on Technology:

- What technological features do I have access to? What do each of them invite? What do each of them discourage?
- If there is more than one purpose for the overall engagement, which one is most important in each particular moment? Which technological feature(s) best support that purpose?
- What other factors require consideration, such as time, group size, technological skill level, ease of use, relationship or trust within the group, frequency of meeting, etc.?

Suggested Best Practices

Let participants know what to expect: Whatever choices you make regarding design and technology, it’s important to give participants clear instructions regarding how you’d like them to engage, both from a process and a technological standpoint. Do not assume that everyone knows how to use the technology or that everyone is using the same devices to access it (platforms look different on different devices). Take time to explain how you’d like people to engage, demonstrate how to do so, and check for understanding by inviting people to practice.

Consider co-hosting: If at all possible, enlist a co-host who can serve as your “producer” or technical assistant. This person can manage the back-end logistics during the virtual meeting, such as assigning breakout rooms and helping to monitor the chat and hand raise functions.

Remain human-centered: While it is valuable to focus on the pedagogy and technology of virtual working and learning, there is a real risk if we do not keep people and their humanity at the center. We have the opportunity to design virtual engagements that embrace what we know about what we all need: connection, belonging, and the experience of being seen, heard, and understood. It is easy to become consumed by the design and technical decisions and to forget one of our most powerful tools: human connection. Bringing our full, imperfect, genuine, and empathetic selves - and inviting participants to do the same - will make the work more meaningful, impactful, and sustaining.

A Guide to Designing Virtual Containers

When we design dialogic spaces, we are building a “container” to hold the conversation. The container includes the purpose, structures, processes, and agreements that will support the conversation and participation. In an online dialogue or workshop, we are building a “virtual container,” adding technological tools to our facilitator toolbox.

Every choice we make about how we structure a conversation *invites* some ways of being and *discourages* others. When choosing which structures and processes to use, keep in mind what you want to invite, what you want to discourage, and what your overall purpose is. The attached chart is a sample list of tools and facilitation approaches available on many video conferencing platforms.

A note on purpose: while the chart describes specific purposes for each tool, there is a core assumption embedded in Essential Partners’ design practices: we’re almost always designing conversational space for the purposes of fostering connection, trust, and mutual understanding. Each one of the tools below can serve that larger purpose in different ways, in addition to specific purposes around participant learning, engagement, collaboration, and contribution.

Tools for Designing a Virtual Container

Tool	Invites	Discourages	Purpose
Participant Hand Raise	Order; fairness; clarity of process; nonverbal acknowledgement of a question or comment	Spontaneous, informal comments and questions; interruptions	To create a clearly defined process and order for participants' verbal contributions and questions; particularly useful in larger groups
Chat box	Nonverbal/silent participation; short responses; notifications can be distracting; can invite "side conversations" via direct message	Long-winded or time-consuming answers; texture and tone of voice; fuller storytelling and emotion	To create a nonverbal place to hold questions, short comments, introductions, tech challenges or questions, or serve as the "parking lot;" can be unwieldy in a large group and/or can be useful in getting as many voices in the "room" in a large group
Mute Button	Attention and focus on the speaker; clarity about who is speaking/has the floor; when unmuting oneself, it invites a nonverbal clue that they'd like to speak	Talking over each other; background noises that can distract; noises that can help connect (laughter, breathing, short verbal agreements or affirmations)	To ensure some amount of control over the sound and volume; in smaller groups, it is easier to allow folks to manage their own mute button and/or to encourage participants to leave their microphones on
Breakout Rooms	More private conversations; deeper connection; diversity of group perspectives; more voices in less time; some anxiety and disruption when "zooming" between large and small groups	Connecting with or hearing from everyone in the large group; monotony of view (actual view on your screen) and viewpoints (from 1 speaker to several); perpetuation of the larger group's dynamics	To offer participants a chance to have smaller group conversation or engage in a group activity; this tool is useful regardless of the size of the group, but especially so in larger groups

Tool	Invites	Discourages	Purpose
Polling	Participation and feedback in an efficient, easy-to-use manner; reflection; an aggregate of the groups' responses	Individual responses; long-winded responses;	To capture participant feedback, survey the group, check for understanding, or do a "temperature check;" this is useful for all group sizes
Go-Round (facilitator calls on people to respond in an order, calling the "batting order" between speakers)	Predictability and order; the facilitator's voice in between each speaker (which may center the facilitator more than usual or interrupt the flow)	Anxiety or uncertainty about how or when it's someone's turn to speak; the first speaker being the same each time (the person most likely to volunteer to go first)	To create a clearly defined process and order for participants' response to a question; particularly useful in smaller (4-12) groups
Pass the Baton (facilitator calls on one person or asks for a volunteer; that person calls on the next person, etc)	Participant ownership over the process and a shared commitment to engagement; unpredictability of the order of speakers; anxiety around pronouncing names, going last, or deciding who to choose	A clear order of speakers and some sense of when it's your "turn" to speak; facilitator as center or singular decision-maker	To create a shared process and order for participant engagement; may be best suited for smaller groups, groups that already know each other, or when the group is self-facilitated
Popcorn (people volunteer to speak when they are ready, through a hand raise or other function)	Participant ownership over process; spontaneity & energy; "building off" others' responses; organic, connected convo; old patterns re: who speaks, when; talking over	An ordered, predictable pattern; participation from those who are less likely to "jump in"	To provide a more organic, connected conversational structure where people speak when they are ready; best suited for smaller groups, where there is more "air time" per person and with agreements or conditions in place that promote sharing air time; or for particular, limited amounts of time within an overall conversation