

**democratic
society**

Digital participatory
budgeting (PB) resources
& templates for
practitioners

demsoc.org

Digital participatory budgeting (PB) resources & templates for practitioners

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2021



The Democratic Society Ltd., is a non-profit company limited by guarantee, registered in England with number 5785839.

Registered office 28 Fourth Avenue, Hove.

UK postal address: Melting Pot, Edinburgh



Funded by the Scottish Government as part of Scotland's supporting community access to digital participatory budgeting tools project

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Contents

This document contains a series of templates and guidance that community practitioners can use to help them set up and run a participatory budgeting process with digital elements.

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Further digital tools resources not included in this document:

- Digital tools developer workshop recording [available here](#)
- FAQ digital PB tools from developers [available here](#)
- Resource covering some of the digital tools feedback and an example facilitation plan with how you could use free or cheaper tools to do PB from the user-journey & testing workshop available here
- Digital PB podcasts/case studies <https://audioboom.com/dashboard/4986785>
- Digital PB webinar recordings
 - Intro to Digital PB: <https://www.youtube.com/watch?v=EyjSpnpIo44&t=401s>
 - Voting: <https://www.youtube.com/watch?v=u1aNiMDe7U0&t=707s>
 - Idea generation & Deliberation: <https://www.youtube.com/watch?v=2JfwgUP2Sko&t=819s>
 - Planning your PB: <https://www.youtube.com/watch?v=MTMgkbMFd9A&t=129s>
 - How to be Comms Savvy (session 1): <https://www.youtube.com/watch?v=bOvqV8hCD6I&t=27s>
 - How to be Comms Savvy (session 2): <https://www.youtube.com/watch?v=M6a2i8aP3no&t=566s>
 - Security, verification & GDPR in digital: <https://www.youtube.com/watch?v=7M4HXTPINuI&feature=youtu.be>
 - Inclusion in digital & design: <https://www.youtube.com/watch?v=bEFVU06Kn6U&t=1310s>

A template privacy statement

Below is an example template which you can use to provide information on privacy and data to participants

[Add in who the organisation is, relevant partners and where you work and what kind of work you do.]

[Add in who you are registered with i.e the [Information Commissioner's Office](#) in the UK.]

Privacy and data protection are really important for [add your organisation]. As such, we are committed to explaining very clearly how we will use any personal data we hold about you.

We have set out how we will collect and use personal data below. However, if you have any concerns or questions please contact [add in key point of contact i.e the nominated Data Protection Officer] and we'll respond as soon as we can – and certainly within a month. You can contact us via email at [add contact] or post at: [add address]

In short, we don't sell your data and will only share your data as outlined below, other than when required to by law. We only collect data to deliver the work we are funded to do so, to run a participatory budgeting initiative, to support participants in the process and the development of PB in [add where the PB is taking place i.e your community or local authority]. Where we can, we will seek your consent before processing and collecting your data.

This privacy policy may change from time to time, in line with legislation or amendments in our internal ways of working. We will not explicitly communicate these changes, but instead recommend you check this page occasionally for any changes.

More general information about the current laws and lawful bases for data collection can be found on the [Information Commissioner's website](#) (UK residents).

What data we collect and how we use it

1. Our newsletter

If you subscribe to our newsletter, your name and email address will be added to our mailing list, which is hosted with [\[add where it's hosted i.e Mailchimp\]](#).

We only use data from this mailing list to send monthly newsletters, and if consent is given, to get in touch directly about activities we think might be of interest. We do however gather statistics related to email opening and clicks to help us monitor and improve our newsletter. Likewise, we invite you to update your profile and provide us with additional information such as country of origin, to help us better understand our audience.

If you subscribe to our mailing list, we will retain your data until you unsubscribe, or otherwise ask us to remove your details. To help you unsubscribe every newsletter contains a quick and easy unsubscribe link in its footer.

In subscribing to the newsletter, you are consenting to the terms laid out above. The lawful basis for this is termed 'GDPR 6(1)(a) – Consent of the data subject'. Please [see the ICO](#) for more in depth information.

2. Signing up to an event or workshop

We use [\[add in the relevant tool/s you use for recruitment i.e Eventbrite\]](#) to handle ticketing for some of our events. We ask for as little personal information as possible to support your attendance, such as name, email address, and whether you have any accessibility needs or dietary requirements. We will use this data to ensure we meet (wherever possible) any accessibility needs or dietary requirements, to manage ticketing, to send reminders about the event beforehand, or to send a follow-up subsequently.

Eventbrite transfers personal data outside the EU. For more information on this and to see their data retention policies, please see their [privacy policy](#). If you sign up to attend an event of ours, we will retain any data you have provided for up to 3 months after the event, or up to 3 months after any project the event is linked to has finished – whichever is longer.

By signing up to our events, you consent to your data being used in the above ways, and the lawful basis for this is termed '[GDPR 6\(1\)\(a\) – Consent of the data subject](#)'.

3. Project Work

We undertake a wide range of project work – from designing and delivering collaborative and democratic processes such as participatory budgeting [\[add in other activities\]](#). Where we're doing this, we will give you full details about how we will use and look after your personal

data. In most instances, we will use a consent form that explains this, the lawful basis for processing your data, and your rights – including how to revoke consent.

4. Cookies

Like many other websites, [add in if you use these- i.e we use cookies and Google Analytics to help us make our websites better]. These tools are very common but they do have privacy implications. When you visit sites that use these tools, you are potentially telling companies such as Google that you visited, as well as some information about how your web browser is configured.

We sometimes place small data files on your computer or mobile phone when you visit our site, known as cookies. This information can be useful for you. For example, if you leave a comment on the blog, cookies ensure that the next time you comment, you won't have to re-enter your credentials.

We use Google Analytics to collect information about how people use this site. We do this to make sure we understand how we could do it better. Google Analytics stores information such as what pages you visit, how long you are on the site, how you got here, what you click on, and information about your web browser. IP addresses are masked (only a portion is stored) and personal information is only reported in aggregate. We do not allow Google to use or share our analytics data for any purpose besides providing us with analytics information, and we recommend that any user of Google Analytics does the same.

If you don't want to share your browsing activities on this site with other companies, you can install opt-out browser plugins, such as the [official browser plugin for blocking Google Analytics](#).

Your rights

You have a number of legal rights regarding your data. For a detailed summary of your rights, please see the [Information Commissioner's website](#). To exercise any of your rights, we would prefer you contact [add in key point of contact or nominated data protection officer] at [add contact] or by sending a letter to us [add address].

We will respond as quickly as we can and must do so within a month. You can also exercise any of your rights to any of our team when you see us in person, or on the phone, via email, [add in if this is an option; or via our professional social media accounts].

Right of access: You have the right to access a copy of your personal data, to see what information we hold about you.

Right to rectification of data: If you believe any personal data we hold about you is incorrect or incomplete, you can request we rectify this.

Right to revoke consent: You have the right to revoke consent at any point regarding activities detailed above. We have identified under activities above how to do this and will make sure we do so.

Right to erasure: You have the right to request that we delete the data we hold about you. There may be instances in which there are legitimate reasons for us to continue to hold data, but wherever possible and whenever we are relying upon your consent to hold and process your data, we will delete what we hold.

Right to object: You have the right to object or complain about how your personal data is processed. If you have any concerns about how we handle your data, please contact us. You also have the right to complain to the [Information Commissioner's Office](#) (UK residents)

However, please do contact us first, so that we can try to help.

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Facilitation & online moderation guidelines

What is facilitation

A facilitator is a person who helps a group of people to work together better, understand their common objectives, and plan how to achieve these objectives, during meetings or discussions. In doing so, the facilitator remains "neutral", meaning he/she does not take a particular position in the discussion. Facilitation is a process of enabling groups to work cooperatively and effectively together and it emphasises the involvement of all participants in a meaningful way.

A facilitator's role is about helping participants to play a full part in discussions. In other words, it's about helping participants to follow the process, put forward their views, and discuss the issues in an environment which is friendly and welcoming, and in which everyone is heard and treated respectfully. It is not about putting forward your own views, asking your own questions, or trying to convince others to agree with your own opinion.

Why might you need facilitators for deliberative events, workshops or discussions

For most deliberative events, workshops or discussions, a facilitator is usually required to help groups work through issues, ensure everyone has an opportunity to participate in the discussions, keep to time and keep a focus on the purpose and objectives of the event. Facilitators need to be well-briefed in advance of a deliberative event and comfortable managing a deliberative process.

The aims of a facilitator's role are:

- To help participants make better use of the knowledge and ideas that they collectively possess - it is not about providing knowledge to participants;
- To be neutral in terms of content - but not the process;
- To act as a trusted third party and not skew the debate to favour any one side or group;
- To have an awareness of and to mitigate power differences within a group;
- To be distinct from that of a chair or other more directive leadership role in meetings.

Set ground rules & collective agreed ways of working

One design element that is crucial in ensuring discussions stay on track particularly if you anticipate some difficult discussions, is setting some ground rules or collective agreed ways of working. Participants should agree guidelines for how the discussions will take place, for instance creating their own conversation guidelines, this can ensure discussions stay on track. This will also support participants to manage their own behaviour and gives facilitators the license to step in should any issues arise. This helps establish conditions in which all participants feel able to participate. Participants who create their own ground rules or conversation guidelines will be more inclined to stick to them as well as this creates a sense of ownership. One example of this is Scotland's Citizen Assembly's Conversation guidelines available [here](#).

Online facilitation

Similarly to offline in-person discussion facilitation, online can work slightly differently. With the world moving online, you might want to consider using different methods of deliberation. You can still run online deliberative events using video conferencing tools such as Zoom, hosting discussions by putting people into smaller groups using breakout rooms, capturing ideas through digital whiteboards such as Miro and google Jamboards, sharing videos, live-voting through polls or Menti-meter. There are lots of tools out there to support the move to online. One great example of this is Scotland's Citizen Assembly where they shifted their in-person Assembly online, where over 100 citizens are now participating in deliberative discussions using Zoom.

Capturing ideas

Deliberative events will require some form of note capturing to ensure all the discussions and ideas that develop are recorded so they can be taken forward later. This could be done with the facilitator writing notes as participants talk, participants themselves writing their ideas or having an individual scribe to note-take the discussions on flip-chart paper, post-its or if doing an online deliberative event this could be done using online tools such as Miro boards, google Jamboards or even audio recording the discussions and translating.

To ensure the notes accurately reflect what has been discussed, the facilitator or note-taker should check with participants that they are happy with what is being recorded and give them opportunities and space to add to or put things in their own words.

Facilitation tips for encouraging deliberation

There are lots of methods in which facilitators can encourage deliberation and ensure the discussions stay on track to reach your objectives. Below are some tips for facilitators whether working online or offline:

Encouraging deliberation

1. Use the full time available / do not rush to a conclusion
2. Ask participants to reflect on and articulate their reasons why, and record the range of views / rationales that are coming through
3. Encourage participants to respond to / build on the contributions of others
4. Give space in the discussion for disagreement / do not force consensus

Participant(s) dominating discussion

1. Establish your role/authority from the outset
2. Demonstrate they've been heard (e.g. visibly note their point)
3. Thank them for their point and direct the discussion to another participant
4. Remind them of the conversation guidelines
5. Try to build up a rapport that allows you to check them
6. Have a quiet word with them during a break

Participant(s) not contributing to discussion

1. Give participants time to think to themselves before discussing
2. Get participants to start talking in smaller groups (2s / 3s), before the whole table conversation (if needed to encourage quieter people)
3. Go round table and ask for one point each (if needed to encourage quieter people)
4. Direct a question to them / ask if they have something they'd like to contribute
5. Have a quiet word with them during a break

Reaching agreement / Prioritisation

1. Ask participants to identify a priority each
2. Check whether there are any other options that participants feel very strongly about
3. Discuss those priorities, including what members agree and disagree on
4. Encourage participants to consider whether it is something they could live with (even if they don't necessarily love it)
5. Encourage participants to negotiate with one another
6. Play the conversation back to participants, checking possible points of consensus that may be coming through (e.g. what I'm hearing is that there might be agreement on X)
7. See if discussion converges towards a consensus. If needed, ask participants to vote on remaining options.

Facilitation principles

- **Providing purpose.** The citizens' assembly should begin with a clear articulation of its aims, agenda and what will happen with the results. It's important for participants to feel able to participate and that their contribution is worthwhile. It is also important to manage expectations at this stage; this includes explaining what is out of scope.
- **Collectively agreed ways of working.** Participants should agree guidelines for how the deliberation will take place. This will support participants to manage their own behaviour

and gives facilitators the license to step in should any issues arise. This helps establish conditions in which all participants feel able to participate.

- **Framing.** Participants are best able to engage with a complex subject where they have agreed a framework through which to view it. The first round of deliberation should focus on the values on which participants will base their discussions and final decisions.
- **Seating plan and room set up.** Different seating plans will ensure that participants discuss the issues with a range of people. This stops groups getting stuck in particular cycles of arguments.
- **Enough time.** Participants need sufficient time to digest, discuss and work through the information they hear. It is better for participants to have enough time to consider a more limited number of topics and produce a smaller range of outputs than to rush through a larger agenda.
- **A clear structure.** Participants need to go through a logical series of steps in order to arrive at their conclusions. This includes setting participants tasks, such as ranking options at their tables, that create a framework for discussion (as opposed to just saying “talk”). The aims set out at the beginning of the assembly should be revisited throughout, reminding participants of why they are there and the purpose of the process.
- **Small group discussion.** Personal reflection and small group discussions must be built in so that all participants, particularly those who are less confident, can form and put forward their own opinions. Most of the deliberation during events takes place around small tables, with 5-10 people allocated to each table. At the IiDP assemblies, some of the table facilitation was led by council officers, who had previously been trained in basic facilitation.²⁶ When groups return to plenary, the tables should be able to report back their discussions and comment on the ideas emerging on other tables.
- **Personal reflection.** After each panel and Q&A, participants at the IiDP assemblies were asked to write themselves a postcard to capture the information and arguments they found most compelling. As well as providing an aide-memoire for later, this process of reflection gives each participant the space to collect their thoughts and make sense of what they have heard.
- **Note-taking.** Notes of the discussion should be displayed openly on Post-it Notes and flipchart paper. We recommend writing one idea on each Post-it so the different comments and suggestions can be arranged and clustered.
- **Accessibility.** The success of the mini-public depends on all participants feeling able to engage. This includes ensuring that the venue and all activities take into account any accessibility requirements participants have. No jargon should be used and any key terms must be explained.

- **A range of diverse exercises.** Variety is critical to keeping participants engaged and making the assembly an enjoyable experience for everyone. It also helps make the process to be more inclusive of participants with different learning and thinking styles.

These facilitation principles should be applied throughout the assembly, in the learning, deliberation and decision-making stages, to which we now turn.

Facilitation do's & don'ts (Citizen Assembly example)

These do's and don't can be reflected for both online and offline facilitation.

The Do's	The Don'ts
Help ensure everyone feels welcome	Offer, or be seen to offer, to participants subjective or personal opinions on any aspect of the issue being discussed.
Help put everyone at ease / make them feel comfortable	Answer any content related questions- if there is an expert speaker or someone with that information ask them to contribute.
Help ensure everyone is heard	Add to the information on these subjects covered in plenary and question sessions.
Give feedback from your table, if relevant	Talk to any journalists present, or give interviews to them.
Guide participants through (table-based) tasks, helping them to achieve the aims of the exercises and to do so within the available time.	Talk to observers while facilitating at an event.
Remind participants of the conversation guidelines as necessary, and help ensure they are followed	
You are welcome to answer <u>process</u> questions if you know the answer. The lead facilitators can help with process questions where you're unsure or don't know. Please refer all <u>content</u> questions to experts in the room. We will provide a system of coloured cards to help with this;	
Flag any problems with the lead facilitators / hosts. This should be done while the event is ongoing, only if critical.	

Online moderation

An online moderator is someone who monitors posts, comments that are posted on blogs, message boards, websites, chat rooms, etc. Moderators will settle disputes, remove posts that are offensive or those that break forum rules and also put posts into their rightful categories. If you're using an online discussion forum or a platform to engage citizens, you may need to use some form of online moderation to encourage discussions onto your online tool but also remove inappropriate content as these online tools tend to be public for transparency.

A great online moderator will promote a social feeling online through prompts, comments, and question language designed to make respondents feel comfortable, and to encourage a feeling of community online as they engage with their fellow participants.

Top tips for online moderators

- Be human
- 'Frame the right questions' -this means thinking through how your questions could be perceived and ensuring they are open, welcoming and set the right tone for the online space
- Create a welcoming, fun community space that people feel they can contribute to
- Add a 'test' or fun question or method such as an introduction or game that people can contribute to as a starting point to get them familiar with the platform
- Post some initial ideas or suggestions already so people are not coming to a blank platform

Questions to consider when setting up an online dialogue or engagement platform for people:

1. Do you have an allocated person to moderate online content? (i.e new proposals, comments, debates, language, behaviour, etc)
2. Do you have a person/s who can facilitate debates or conversations at events and online? (for instance, proposing topics of conversation, polls and making sure it stays on track)
3. Do you need to provide any training to staff to ensure they know how to facilitate/moderate online?

It's important to make it really clear to all participants how the platform will be monitored and moderated - for instance, how you will help with new user registrations, how new proposals and/or discussion will be moderated, what content (if any) may be removed, and

how people should get in touch if they have any questions or concerns. You should also make clear the time frame in which staff will act and who to contact if there are any major problems or people need support contributing to the site.

Many of the available digital tools for online deliberation have an option to use algorithms to reduce the amount of moderation needed - for instance, automatically banning swear words - and most give you the option to have comments posted either before or after a moderator has had a chance to check the post.

Whatever process you follow for moderation and facilitation, you'll need to provide light touch guidelines stating what the platform is for, and some guidelines for how people are expected to engage.

Making these guidelines too strict can result in citizens having less trust in the process (as they don't feel trusted) - and for this reason, we tend to recommend that there is no 'pre-publication' moderation, and that instead residents are able to engage directly. When thinking about any automatically banned words, it's likewise important to be mindful of how your community tends to speak and engage, and ensure you are not creating situations in which dialect, or peoples natural way of talking is prevented from appearing on the site.

Key questions to consider	Top tips
<ol style="list-style-type: none"> 1. How will you generate moderation guidelines, and will you allow the public to self moderate? 2. How will you communicate these guidelines, and communicate the way these were generated? 3. Do you want to use algorithms to automatically ban some content, and what sort of words might be appropriate to ban? 	<ul style="list-style-type: none"> • You might consider how a small group of residents or citizens could work together with you to develop guidelines. Alternatively, you could ask your steering committee to develop these.
<ol style="list-style-type: none"> 4. How are you going to implement these guidelines? 5. Do you have an allocated person (or persons) who will moderate the platform? 6. And what will happen out of typical working hours (such as evenings or weekends)? 	<ul style="list-style-type: none"> • It's recommended that those who are moderating any discussion is as neutral as possible e.g. part of the organisations running the PB process. It could be more than one person. • Alternatively, If it's the case of moderating proposals it could be more than one person, proposals can be allocated to 'experts' i.e if the proposal idea is within the theme of tackling poverty or environment a selected member of staff from council or community that work in poverty or environment fields could be chosen to review and process those proposals.

<p>7. Do moderating staff have the freedom to post themselves, or do any responses they make need to be signed off by senior staff?</p>	<ul style="list-style-type: none"> • If the latter, ensure senior staff are aware of the need to be available to sign off responses with a short turnaround time, and consider developing a standard set of responses to questions that are likely to emerge repeatedly on the site to speed up the speed of response.
<p>8. How will your organisation provide training and support to the individual or individuals moderating the platform?</p>	<ul style="list-style-type: none"> • Consider how you might share skills internally. Staff with a strong track record in engagement may be able to run in-house training sessions, or act as mentors to less experienced or less confident colleagues • Perhaps bring in external expertise from a specialist or introducing a staff exchange from an organization with complementary skills. • While most conversations in online spaces are civil and positive, there may be some which are more challenging. Ensure any staff engaging online have access to a space in which they are able to share their experiences, rather than holding on to any anxiety themselves.

Starting conversations online

In offline deliberation, sometimes people don't want to be the first person to speak. When using digital tools - this effect can be amplified as some people can find it harder to type into a blank space than talk into a quiet space.

Key questions to consider	Tips
<p>1. Can you start by generating polls or debates of interest that doesn't require too much effort that people can answer easily?</p>	<ul style="list-style-type: none"> • Perhaps this could be on helping to agree the overall priorities for the programme/topic.
<p>2. Are there active individuals who you can ask to post ideas to initiate conversation?</p>	<ul style="list-style-type: none"> • Steering group members or community champions
<p>3. Could you identify a named individual responsible to facilitate and encourage online conversations?</p>	

Identity

One of the ongoing discussions in online discussions & deliberation is whether or not to allow those participating to use their own name, or allow people to use usernames, and participate in a more anonymous fashion.

There are benefits to both. Some argue that using a full name encourage people to be civil and less likely to engage in 'trolling' or disruptive behaviour. Equally, there may be some who do not feel comfortable raising their voice in an online space with their full name attached, and feel this may place them at risk in the offline world. This is often true of those who may suffer disadvantages, or who may be challenging the status quo.

One thing to remember is while you can state that people should use their real name, there is nothing that can be put in place to require this. It's very easy for an individual to deliberately subvert the process by using a name such as Jane or John Doe. Putting in requirements that can not be stuck to may lead to your process being undermined.

Key questions to consider	Tips
<ol style="list-style-type: none"> 1. Are your residents/citizens likely to have strong views about using their own names vs. allowing anonymous contributions? 2. Is the PB process you are running likely to generate ideas/proposals that may challenge existing practices significantly? 	<ul style="list-style-type: none"> • If you have set up a steering committee for your PB process, you might think to ask them this, or might ask a small number of those who have engaged early in the process.
<ol style="list-style-type: none"> 3. How are you going to explain to citizens/residents the decisions you've made about this? 	<ul style="list-style-type: none"> • How is your system set up to support those whose names might be outside your own experience. For instance, some Americans commonly write their name including a middle initial, Spanish speakers commonly have two family names, or small words may be added between names (e.g. 'bin' in some Asian cultures meaning, or 'de' for some Spanish speakers). How are you expecting those whose names are in non Latin alphabets, or use accents/characters that don't occur in English to represent their name?

A template communications plan

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Below is an example plan which you can use to help shape your communications strategy to improve citizen participation in your democratic or engagement activities

Further communications resources:

How to be Comms Savvy (session

1): <https://www.youtube.com/watch?v=bOvqV8hCD6I&t=27s>

How to be Comms Savvy (session

2): <https://www.youtube.com/watch?v=M6a2i8aP3no&t=566s>

Template communications plan

Aim:

A good starting point is to think about what you are trying to achieve and why you need to develop a communications plan in the first place, for example is it to get more people to participate in your online platform or to sign up to an event?

Goals:

Your goals go into more detail and you could have more than one goal for example : to boost the PB platform with more people's idea contributions to improve people's trust in decision making activities to reach certain audiences and boost their participation

Approach:

The approach you take can vary on time, budget & capacity to do the communications work and you have to be realistic in planning this out. For example, if you only have one person that can do the communications work they might need a longer timeframe to create the content, messages and distribute.

You might want to set out a timeline for key milestones you want to achieve for your communications i.e awareness messaging, recruitment, events, updates, outcomes or news from events etc.

Measuring results:

You might want to consider how you measure results for your communications- this means you can see if it has been a success or where the lessons learned are for next time.

For example you might want to measure:

- # of people filling out ideas on your PB platform
- # of votes
- # of re-tweets or shares
- # of workshop/event sign-ups

You might want to measure some specific things like

- To measure if you have had any effect on building awareness with the public
- To measure if you had any effect on building public trust
- To measure if you had any effect on action for example people participating and engaging in the activities you want people to get involved in

Roles & responsibilities:

You might want to add in some information on who is responsible for what and what their deadlines are. This can help make it clearer who is doing what if things go off track.

For example:

- Jim is responsible for creating the content such as visuals, messages, videos by x date
- Martha is responsible for distributing the content through social media channels from between x date to x date
- Ben is responsible for contacting all the networks directly and asking them to share the content/messages

Monitoring:

Monitoring communications activity is key to make sure it is having impact and if not you can adjust your communications accordingly.

You could monitor communications through:

Activity Metrics

Reviewing your process of producing and sharing your messages and whether you're following through on your work plan and best practices.

- # of content created (Tweets, Facebook posts, Blog posts, images, video created)
- # of people contacted and network channels activated (retweets, emails, communication)

Reach Metrics

Reviewing the size of our audience and whether it's the right audience or it needs re-targeted.

- Social media post impressions
- PB digital platform, community or local authority website page, sources of incoming traffic
- Sign-ups or interactions on the collaborative forum/tool

Engagement Metrics

Reviewing when and how others engage with your messaging, for instance which platform did they find information out etc.

- # website page impressions (or facebook/blog etc)
- Bounce rate
- Duration of average session visit
- Audience profile data

Audiences:

You will want to have an idea of the audiences (community groups or participants) you want to attract to your process for example demographic groups (i.e young people) or people with a specific interest (i.e healthcare or sports)

It is key to understand who your audience is, what they are interested in and how they currently engage. This will help you shape your approach in how you can communicate with them. For example, they may use Tik-tok but never go on Twitter. You will want to write down:

- Who the audience group is and what they are typically interested in
- Approach which includes how you will communicate with them i.e through social media, through email, through phone or some other means
- Key messages and use of language, which you can either pull from your main key messages below or shape specifically to target that audience group.
- Content this could include content you have already created or content that is targeted specifically at that audience group.

You may also have more than one audience group, for example young people and adults from the LGBTQ community, in which case you might have more than one approach in reaching out to these groups.

Messages:

“PB means nothing to anyone so make it meaningful” -How to be Comms Savvy

- Come up with a message- what are you actually telling people? Make sure you are prioritising information by giving out the most important piece of information first which could be just a couple of sentences- a slogan!
- Secondary information would be how can you upload an idea or vote and when can you do this?
- It's a good idea to create useful materials in formats that you can transfer over to work both online & offline
- Tell people why this process works if its been done before in your area or somewhere else if there's another example.

Opportunities and ideas for content:

You can also add a space for creativity and out-the-box thinking for example what might stand out to people or make people take a second look at what you're doing?

This could be things like photo opportunities, quirky videos, vox pops, bold messaging, utilising local news or networking opportunities such as speaking at upcoming events.

Channels:

You may have multiple distribution methods such as through websites, social media, newsletters, post/posters/flyers/bulletin. You might want to consider where your primary

source of distribution will be going through i.e is it your website or is it a different branded website/PB platform/twitter handle. This is important as it needs to be clear where you want to direct people to and who the 'owner' of the project is.

For example, your primary channel might be your digital PB platform "your voice, your choice" and your secondary channel might be your community or local authority website or social media site.

Network & stakeholder mapping:

You can also create a list or a 'map' of network organisations, people and 'stakeholders' i.e people that are key in the community that can help you share out the message.

A network map could list organisations that you think would be open to sharing the message through their channels. It could also focus on organisations that you think could help you to reach new audiences. Network maps can take a bit of time to create but once you have created them it is a matter of contacting and reaching out to all of those people/organisations.

Example:

Stakeholder	Network channels	Audience
Age Scotland	Twitter: @agescotland Policy engagement meetings Newsletter: Yes. Contact: communications@agescotland.org.uk	Interest in civil liberties and how trends and policy effect society and especially vulnerable or marginalised groups.

Collaboration tools for communicating and sharing files



Staying safe online




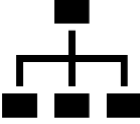


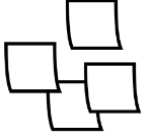




- Evaluate and [choose the tools you use](#) to make sure they work for you.
- Learn about best practices for [communicating with others](#) and incorporate them into your routines and tools.
- Use a password manager to [create strong passwords](#).
- Ensure that you have [two-factor authentication](#) (also known as [2FA](#)) enabled for as many accounts as possible.
- Consider your needs and [choose the VPN that's right for you](#).

Different tools and uses

1. Flock

Team members can exchange messages, share files, host video conferences, manage to-dos, and set up calendar events all from one easy-to-use app. [Flock integrates with popular business tools](#) such as Google Calendar, Google Drive, Asana, MailChimp, and Twitter, making it easier for team members to stay on top of things without juggling a dozen different apps.

Flock Assets	
 <p>video conferencing</p>	 <p>integrated search</p>

 <p>channel messaging</p>  <p>voice notes</p>  <p>reminders</p>  <p>admin controls</p>  <p>user permissions</p>	 <p>file sharing</p>  <p>to do's</p>  <p>polls</p>  <p>authentication</p>  <p>data retention</p>  <p>screensharing</p>
<p>Flock user guide/s</p>	
<p>https://www.flock.com/videos/</p>	
<p>https://blog.flock.com</p>	

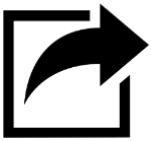
2. Slack

[Slack](#) is a channel-based messaging platform. With Slack, people can work together more effectively, connect all their software tools and services and find the information that they need to do their best work – all within a secure, enterprise-grade environment.

Slack Assets



Integrated search. Instead of asking someone for information every time you need it, you can reduce repetitive questions by searching instead, saving everyone valuable time.



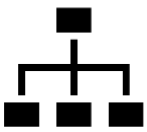
File sharing. Keep files and the messages about them together in channels.



Multiple channels. Work faster with external clients, vendors and more by working in a channel.



Workflow builder



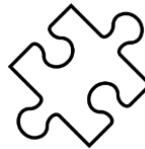
Admin controls



Video & voice calls. If working face to face is easier, go from a channel to a voice or video call with one click.



Channel messaging



Apps and integrations



Identity & device management



Data protection



User permissions



screensharing

Slack user guide/s

<https://slack.com/intl/en-gb/resources/using-slack/slack-tutorials>
<https://www.youtube.com/watch?v=9RJZMSsH7-g&feature=youtu.be>

3. Microsoft Teams

Microsoft Teams is a proprietary business communication platform developed by Microsoft, as part of the Microsoft 365 family of products. Teams primarily competes with the similar service Slack, offering workspace chat and videoconferencing, file storage, and application integration

Microsoft Teams Assets



Messaging. Send GIFs, stickers, and emojis in a group chat or in one-to-one messages.



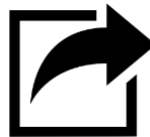
Video & voice calls. Group chat to video conference. Teams of two or 10,000 can meet in one place from anywhere.



Calling. Make and receive calls directly in Microsoft Teams with advanced features like group calling, cloud voicemail, and call transfers.



Private channels. Have private conversations with a subset of the team and control access to related files and notes.



File sharing. Keep files and the messages about them together in channels. Securely store, access, share, and collaborate on files at work, at home, or on the go.






Co-author files. Work together on the same file in real time within Teams with instant, automatic sync and version history tracking.



Translation. Seamlessly communicate globally with inline translation in chat and channel messages, supported in 35 languages.



Org-wide team. Bring your organization together in one team to keep

 <p>Enhance collaboration and streamline business processes using your favourite apps within Teams.</p>  <p>Multiple channels. Work faster with external clients, vendors and more by working in a channel.</p>	<p>everyone in the loop and ensure everyone has a voice.</p>  <p>screensharing</p>
<p>Teams user guide/s</p>	
<p>https://www.chorus.co/resources/news/microsoft-teams-a-beginners-guide-to-teams-in-office-365</p>	

4. Knowledge Hub











[Knowledge Hub](#) has been an independent small company since 2016, maintaining the original ethos of a free to use platform for public service professionals to share knowledge, experiences and learning.

Knowledge Hub is a place to connect, collaborate and communicate with members just like you across public service. Knowledge Hub provides its digital collaboration tools to a broad audience of over 500 public sector organisations within the UK and internationally. It is used extensively in central and local government, health, education, housing, police and fire services.

The growing Knowledge Hub community consists of over 150,000 public service professionals and their partners who use Knowledge Hub to exchange ideas and solutions and share good practice and innovation. Members need no longer reinvent the wheel, but can gain efficient, effective and reliable advice from their peers in a secure environment.

Knowledge Hub’s technology is an enabler for public service organisations everywhere to share information and learn from each other within online groups. Knowledge Hub groups are flexible spaces that can be used for a variety of purposes, from large communities of practice, to small time-limited project groups, working groups, training programmes or recruitment campaigns. A Knowledge Hub group may be open, restricted or private.

Knowledge Hub Assets

 <p>Group home page Add your group name, description, group logo and see an activity stream displaying the recent contributions to the group helping you get to information quickly. See group announcements and polls.</p>  <p>Discussion forum Ask questions, have conversations, discuss solutions to problems, share experiences with group members. Use forum categories to organise discussion threads.</p>  <p>Library Upload, share and comment on documents and other files. Organise your files in a relevant folder structure for members to access.</p>  <p>Wiki Create editable pages to collaborate together on documents, FAQs, signposting lists and much more.</p>  <p>Members View all members of the group and their profiles. Connect with each other to follow their activity on Knowledge Hub, send them a message and use the instant chat function when they're online at the same time as you.</p>	 <p>Events Promote forthcoming events for members to 'like' and comment on. Display them in a list or in a calendar view.</p>  <p>Polls Add multiple choice poll questions to engage members. Make them fun, enlightening and use them as conversation starters.</p>  <p>Announcements and messages Add announcements and send group messages to signpost members to recent content and encourage activity.</p>  <p>Settings Group facilitators can access a range of tools to help them facilitate and manage the group, e.g. invite members, manage facilitators, send group messages and set group blog filters.</p>  <p>Ideas Generate ideas and 'like' and comment on your favourites to see which are the most popular for group members.</p>
<p>Knowledge Hub user guide/s</p>	

5. Twist

[Twist](#) is a distraction-free space where teams can balance focused work with collaborative conversations. While fun at first, Slack can quickly become overwhelming. Twist is a tool for

teams that prioritize focused work, structured communication and company-wide transparency. It does not include video/voice calling or screensharing.

Twist Assets



Threads. keep conversations organized by topic so it's easy to come back to them hours, days, or even years later.



Multiple channels. Channels organize threads by department or project. Browse public channels to get a bird's-eye view of what's happening.



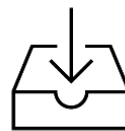
No online/offline indicators. No pressure to stay connected all day and respond immediately. Less real-time-all-the-time, more deep work.



Collaborate with guests. Streamline communication with contractors, freelancers, or consultants by inviting them as guests to specific channels.



Messaging. Messages are private conversations with one teammate or a group. Talk privately, quickly check in, or just socialize.



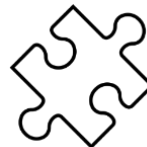
The Inbox gathers all the threads that are relevant to you in one place. Check in here to catch up on what's new.



Search unearths any piece of information you need along with all the context of the original conversation.



Notify the right people. Twist reduces noise by letting you choose exactly who to notify in each thread or comment.



Apps and integrations

Twist user guide/s

<https://get.twist.help/hc/en-us/articles/115003654609-What-is-Twist->

<https://get.twist.help/hc/en-us/articles/115003645705-How-to-organize-your-channels-and-threads>

6. Discord

Discord is a voice, video and text communication service used by over a hundred million people to hang out and talk with their friends and communities. Whether you're part of a school club, gaming group, worldwide art community, or just a handful of friends that want to spend time together, Discord makes it easy to talk every day and hang out more often. Discord servers are organized into topic-based channels where you can collaborate, share, and just talk about your day without clogging up a group chat.

People use Discord for all kinds of hanging out: from live karaoke nights, to screenshare group painting, to virtual wedding parties. People create Discord servers for gaming, yoga classes, comedy fan clubs, and even run entire podcasting businesses. Discord is for anyone who could use a place to talk with their friends and communities.

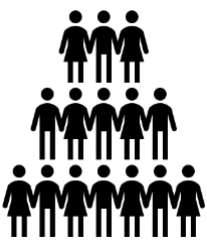
Discord Assets



Multiple channels.



customise your server



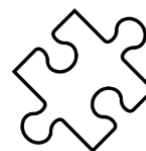
No member limitations



Video & voice calls & hang-out. Stream a game to friends, give your community a live art demo, or present to a group with one simple click.



Channel messaging





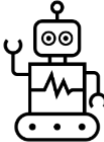






Apps and integrations

 <p>Create your server- an invite-only place where you can talk and hang out with communities or friends. Customize your server with separate text channels for all the things you love to talk about.</p>	 <p>screensharing</p>
<p>Discord user guide/s</p> <p>https://support.discord.com/hc/en-us/categories/115000217151</p> <p>https://support.discord.com/hc/en-us/categories/200404378</p>	

7. Zoho Cliq

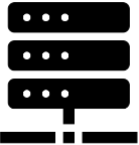
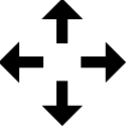

[Zoho Cliq](#) allows you to have direct chat and messaging with another user, or with several users/members in a chat room or channel.




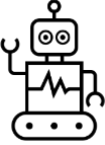
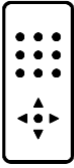

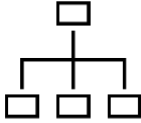
<p>Zoho Cliq Assets</p>	
 <p>Multiple channels.</p>  <p>Channel messaging</p>  <p>Apps and integrations</p>	 <p>day-to-day tasks & calander</p>  <p>Centralise work flow, custom build bots or create command short cuts</p>  <p>Data security. Top-notch security system, with data encryption and secret chat,</p>

 <p>Integrated search. Search for messages, find files shared in a conversation, or look up a user— <u>find what you're looking for</u>, right when you need it.</p>  <p>Video & voice calls</p>	<p>is here to make sure your organization data is always safe.</p>  <p>screensharing</p>
<p>Zoho Cliq user guide/s</p>	
<p>https://www.zoho.com/cliq/webinars.html https://www.zoho.com/cliq/help/</p>	

8. Rocket Chat


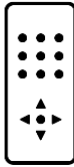
[Rocket Chat](#) is a free and open-source team chat collaboration platform that allows users to communicate securely in real-time across devices, that can be self-managed or on the cloud. Rocket Chat connects your team with customers, suppliers and partners. Centralize all the communication of your projects, avoid missing information and make sure your team works better.






<p>Rocket Chat Assets</p>	
 <p>open-sourced and continuously improved by an active community of developers.</p>  <p>with complete access to code- it can be fully customized</p>	 <p>Omnichannel. One platform that connects social media channels, websites, CRM, and support tickets- enables you to manage conversations with stakeholders from one place, find all the data you need, automate processes, speed up service and improve customer experience.</p>

 highly secure  Channel messaging  File sharing  Centralise work-flow, custom build bots or create command short cuts.	 Multiple channels.  Video & voice calls  organize conversations. channels - Read Only, Private and Public, Broadcast, Threads, Discussions, Mentions, Message History, Push Notifications
<p>Rocket Chat user guide/s</p> <p>https://rocket.chat/features/</p> <p>https://docs.rocket.chat</p>	

9. Whatsapp





[Whatsapp](#) is a free app for iPhones, Android smartphones, Windows Phone and Mac laptops and Windows PC. It allows you to send messages, pictures, videos and even voice recordings, as well as make voice and video calls over the internet for free, rather than using your mobile network which costs you money. Useful for group chat.






<h3>Whatsapp Assets</h3>	
 End-to-end encryption	 Multiple channels.

 <p>Channel messaging</p>  <p>File sharing. Send pdfs, documents, slides and more.</p>	 <p>Video & voice calls</p>  <p>Voice notes</p>  <p>Sync all of your chats to your computer</p>
<p>Whatsapp user guide/s https://faq.whatsapp.com</p>	

10. Signal

[Signal](#) is a cross-platform centralized encrypted messaging service developed by the Signal Technology Foundation and Signal Messenger LLC. It uses the Internet to send one-to-one and group messages, which can include files, voice notes, images and videos. You can share text, voice messages, photos, videos, GIFs and files for free. Signal uses your phone's data connection so you can avoid SMS and MMS fees. End-to-end encryption (powered by the open-source Signal Protocol) keeps your conversations secure.


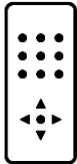
<p>Signal Assets</p>	
 <p>End-to-end encryption</p>  <p>Channel messaging</p>	 <p>Multiple channels.</p>  <p>Video & voice calls</p>


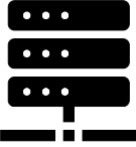




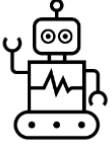
 File sharing.  Incognito keyboard  Group link or QR code	 Voice notes  Sync all of your chats to your computer
<p>Signal user guide/s</p>	
<p>https://support.signal.org/hc/en-us</p>	

11. Telegram

[Telegram](#) is a messaging app with a focus on speed and security, it's super-fast, simple and free. You can use Telegram on all your devices at the same time — your messages sync seamlessly across any number of your phones, tablets or computers. Telegram has over 500 million monthly active users and is one of the 10 most downloaded apps in the world.

With Telegram, you can send messages, photos, videos and files of any type (doc, zip, mp3, etc), as well as create groups for up to 200,000 people or channels for broadcasting to unlimited audiences. You can write to your phone contacts and find people by their usernames. As a result, Telegram is like SMS and email combined — and can take care of all your personal or business messaging needs. In addition to this, we support end-to-end encrypted voice and video calls, as well as voice chats in groups for thousands of participants.

<p>Telegram Assets</p>	
 Heavily encrypted and can self-destruct	 Multiple channels.

 <p>Channel messaging</p>  <p>open-sourced.</p>  <p>File sharing- you can keep all your media in the cloud</p>	 <p>Video & voice calls</p>  <p>Voice notes</p>  <p>Sync all of your chats to several devices at once</p>  <p>Bot API to build specialist tools for Telegram.</p>
<p>Telegram user guide/s https://telegram.org/faq#q-what-is-telegram-what-do-i-do-here https://telegram.org/apps</p>	

12. Google drive

[Google Drive](#) is a cloud-based storage solution that allows you to save files online and access them anywhere from any smartphone, tablet, or computer. You can use Drive on your computer or mobile device to securely upload files and edit them online. Drive also makes it easy for others to edit and collaborate on files.

<p>Google drive Assets</p>	



Google Forms lets you run a survey or quickly create a team rota with a simple online form. Then have a look at the results, neatly organised in a spreadsheet.



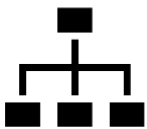
Lay out diagrams, create flow charts and then easily add them to other documents or embed them on a website with Google Drawings.



Drive is encrypted using SSL, the same security protocol used on Gmail and other Google services



File sharing- you can keep all your files in one place. Photos, videos, presentations, PDFs – even Microsoft Office files. No matter what type of file it is, everything can be stored safely in Drive.



Admin controls



With Google Docs, you can write, edit, and collaborate wherever you are. For Free.



With Google Sheets, you can create, edit, and collaborate wherever you are. For free.



With Google Slides, you can create, edit, collaborate, and present wherever you are. For free.



With a Google Account, you get 15 GB of storage for free. Storage is used by Google Drive, Gmail and Google Photos, so you can store files, save your email attachments, and back up photos and videos.





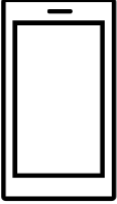

Co-author files. Work together on the same file in real time within an instant, automatic sync and version history tracking.

[Google drive user guide/s](https://support.google.com/drive/answer/2424384?hl=en)

<https://support.google.com/drive/answer/2424384?hl=en>

13. Nord Locker

[NordLocker](#) is a file encryption software integrated with end-to-end encrypted cloud storage. It is available on Windows and macOS. NordLocker is developed by Nord Security, a company behind the NordVPN virtual private network, and is based in the UK and the Netherlands.

Nord Locker Assets	
 <p>NordLocker brings end-to-end encryption (E2E) to the cloud. Secure your data without limits and back it up via a private cloud.</p>  <p>File sharing- Send files to your family, friends, and coworkers. NordLocker gives you complete access control to protect your data from getting into the wrong hands. Only someone with your permission can open your files.</p>	 <p>Access files anywhere. NordLocker syncs your files via a private cloud, so they're always a click away. Log into your account on any PC or Mac to access your cloud lockers.</p>  <p>Back-up data. Don't lose a single file. We encrypt and back up your <u>cloud locker data</u> automatically.</p>
<p>Nord Locker user guide/s</p> <p>https://nordlocker.com</p>	

14. Tresorit

[Tresorit](#) is an online cloud storage service based in Switzerland and Hungary that emphasizes enhanced security and data encryption for Businesses and individuals/freelancers.

Tresorit Assets



Tresorit is an end-to-end encrypted content collaboration platform. Protected by Swiss privacy laws, it offers enterprise-grade security to digital valuables using the highest classification in the cloud



File sharing- you can keep all your files in one place. Photos, videos, presentations, PDFs. Replace risky email attachments with encrypted links. Tresorit empowers you to send and receive files safely from anyone – even non Tresorit users.



File storage. Access files anywhere, as well as collaborate internally and externally, while keeping confidential information safe and intellectual property secure.

[Tresorit user guide/s](#)

<https://tresorit.com>

15. Box

[Box](#) offers private, cloud storage and collaboration space to all members of the Tufts community. Files stored in a Box account are accessible through the web and across Internet-enabled devices.



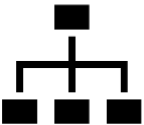


Box Assets



Every file is encrypted using AES 256-bit encryption in diverse locations.





File storage. Access files anywhere, as well as collaborate internally and externally, while keeping confidential information safe and intellectual property secure.

 <p>File sharing- you can keep all your files in one place. Photos, videos, presentations, PDFs.</p>  <p>Apps and integrations</p>  <p>Admin controls</p>	 <p>Co-author files. Work together on the same file in real time within an instant, automatic sync and version history tracking.</p>  <p>Workflow builder</p>
<p>Box user guide/s</p>	
<p>https://support.box.com/hc/en-us</p>	

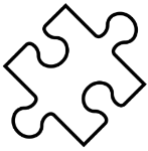
16. Dropbox

[Dropbox](#) is a file hosting service operated by the American company Dropbox, Inc., headquartered in San Francisco, California, that offers cloud storage, file synchronization, personal cloud, and client software.

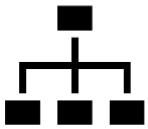
<p>Dropbox Assets</p>	
 <p>Dropbox protects files in transit between our apps and our servers, and at rest. Each file is split into discrete blocks, which are encrypted using a strong cipher. Only blocks that have been modified are synced.</p>	 <p>File storage. Access files anywhere, as well as collaborate internally and externally, while keeping confidential information safe and intellectual property secure.</p>



File sharing- you can keep all your files in one place. Photos, videos, presentations, PDFs.



Apps and integrations



Admin controls



Co-author files. Work together on the same file in real time within an instant, automatic sync and version history tracking.



Workflow builder



Back-up data.

Dropbox user guide/s

<https://support.box.com/hc/en-us>

Tool costs

Tool	Cost
Flock	Free plan: <ul style="list-style-type: none"> • up to 20 members • 5GB storage for file sharing and 10K message history for quick search • Unlimited 1:1 <u>video calls</u>, Built-in productivity apps such as shared notes, polls, and reminders • Unlimited integrations for third-party services, such as Asana, Jira, or Google Drive
Slack	Free plan: <ul style="list-style-type: none"> • Unlimited users, messages, and channels • 5GB storage for file sharing • Unlimited one-to-one voice and video calls • Up to 10 apps or service integrations
Microsoft Teams	Free plan: <ul style="list-style-type: none"> • Up to 300 users • Unlimited messages, channels, and search • Unlimited audio and video meetings with up to 250 participants • 10GB of team file storage + 2GB per user • 140+ apps and service integrations
Knowledge Hub	Free https://khub.net/sign-up
Twist	Free https://twist.com/pricing?lang=en
Discord	Free https://discord.com/download
Zoho Cliq	Free- unlimited users https://www.zoho.com/cliq/pricing.html
Rocket chat	Free- for teams that are ready to control and centralize their communication. https://rocket.chat/pricing/

Whatsapp	Free https://www.whatsapp.com/?lang=en
Signal	Free
Telegram	Free
Google drive	Free
Nord Locker	Get 3 GB of cloud storage for free. 500GB \$3.99 per month https://nordlocker.com/plans/
Tresorit	Free for individuals or £9.58 Standard monthly rate for businesses- discount for non-profits
The Box	Free for individuals. Business Starter £4per user/month paid annually <ul style="list-style-type: none"> • Up to 100 GB of storage • Collaboration with up to 10 users • Built-in integrations with Office 365 and G Suite
Dropbox	https://www.dropbox.com/plans

—

A template technical induction plan

Please note you will need to add or delete sections below based on the relevance to your public event or workshop design. This is to provide you with an overview and guide on how to run a tech induction with people. This example is how we (Democratic Society) ran Scotland's Citizen Assembly technical inductions.

We will organise a series of 1-hour technical induction sessions for participants, starting from (add date). This will include daytime, evening and weekend slots and two dedicated phone sessions. Each session will ideally be capped at 5 participants.

Purpose: Introduce participants to working online and the digital tools that we will be using, providing a space for questions and support to build confidence.

How to book: participants can book slots through Calendly (add relevant booking system).

Attendees: up to a maximum of 5 members per session (not including hosts), the participants will be confirmed to facilitators in an email from the host (add key point of contact).

Whatsapp communication: During the session facilitators may struggle to open several screens on their computer whilst screen sharing. Facilitators will be contactable through mobile/text or through Whatsapp on a separate device. Email & mobile numbers provided below.

Staffing: Each session will require one facilitator, provided by the facilitation team. They will handle the technical aspects. Facilitators will receive a briefing and do a test run through

ahead of the meetings. (Hosts i.e key leads in the process) are also welcome to join these sessions.

Session times & Zoom links		Facilitator/ tech induction lead	Contact details of facilitator
1.	Add date and time Add video call or zoom link with ID/passwords	Add name	Add details
2.	Add date and time Add video call or zoom link with ID/passwords	Add name	Add details
3.	Add date and time Add video call or zoom link with ID/passwords	Add name	Add details

Joining the session: Sessions will be held on Zoom and a link sent to participants in advance. They can join via video using a laptop, tablet or phone. They can also dial in using a phone. We encourage participants to use a computer, laptop or tablet with video on where possible.

Materials:

- We produced a short video showing participants how to download Zoom here: <https://youtu.be/5XHPe2ly6tI>
- Digital tools guidance for participants- including links to the tools for participants to play about with (add in where this pack is saved)
- Online security & updates guidance for participants (add in where this pack is saved)
- Using Zoom on different devices, google docs & Jamboards- including changing your name before joining a Zoom meeting (add in where this pack is saved)

All materials will be available to the participants (add in how this will be done i.e a pack sent via email or through a shared drive or platform).

FACILITATION PLAN

In advance of the workshop, participants will be sent instructions on how to download and join Zoom. They will also be given details of who to contact if they experience issues joining on the day.

Facilitators' pre-session set up

- Make sure you have set up a pre-prepared Zoom poll in the 'back office' of your Zoom account in your meeting
- Make sure that all of the digital tool links are ready in your browser to screen-share, present or share:
 - Google docs <https://docs.google.com/document/d/1GO0F9bT8xQQ03RfA41sz466vqTVomwu-8KifN7sWCA/edit#>
 - Google Jamboard https://jamboard.google.com/d/1P-SYeVE9gks_FtIkEhDzMC77yfmESksmUY21JbKuXEI/viewer?f=0
 - (Add in more relevant digital tools you will be using)

0:00 (10 mins)	<p>Welcome, introductions</p> <ul style="list-style-type: none"> • Facilitator & host introduce themselves and role <ul style="list-style-type: none"> ○ Facilitator will run the tech induction, showcasing digital tools and answering questions that arise- also explain that this session is to test tech and if things go wrong that's great, then we can note it down and get things sorted, either with design tweaks or providing further support. ○ Host/notetaker will note down these tech issues/requirements • Go round the group to introduce themselves and ask participants what they're excited and worried about for the next workshop or event, ask participants what device they're using just now- i.e. a computer or tablet- if tablet explain it will be slightly different but we'll walk you through it, i.e. tap the screen for menu to pop up. • Test muting and turning video off. <ul style="list-style-type: none"> ○ Explain that participants can turn their video off and mute when they are on a break or someone is presenting or a video gets played. • Ask everyone to mute then screen-share and play a very short video or screenshare some slides (this is a good way to get participants to test muting/unmuting- make sure you tick share computer sound in the share screen box in zoom!!!). • Explain that we are working online and it may be a new way of working for some: <ul style="list-style-type: none"> ○ We will be doing things including small group conversations, break out rooms, (add in what is relevant to your event; hearing evidence in zoom, Q&A, generating ideas using google docs or jamboards, some form of electronic voting) - so a slightly different way of working and we will run through all of the tools you will be using here in this session. ○ Times and dates: (provide a brief update on key dates and times i.e when the workshop/event will be)
0:10	<p><u>Zoom (full)</u></p> <ul style="list-style-type: none"> • Explain how to minimise/maximise screen <ul style="list-style-type: none"> ○ <u>Computer</u>: top right corner

(15 mins)

- Phone/tablet: limited functionality, but should be able to 'scroll' to see more participants on the next page by clicking three dots or an arrow on their screen. Tap on phone/tablet to see menu options.
- Explain how to use the chat function and ask members to type in one word how they're feeling today.
 - Explain that the chat is also where facilitators may send links for them to click into (add in relevant detail i.e and it can be used in a specific Q&A but not going to use it much for discussions).
 - Phone/tablet: tap on phone/tablet, it should be three dots & click on more-> chat/manage settings- be wary that if on tablet you can't always see participants at same time as opening the chat. To close: button top left-hand corner, same for 'chat or participants'.
- Explain the reaction tool. Ask participants to 'react' with a thumbs up or clapping.
 - They can use thumbs up throughout this session to let you know they're happy to move on.
- Explain other reactions they can use.
 - In the participants button, bottom left corner, participants can click it and put a yes, no, speed up, speed down or raise hand function for questions.
 - This will be picked up by someone hosting the event/workshop and these will all get cleared during breaks.
 - Phone/tablet: Participants' button on a tablet/phone should appear at the bottom or they might have to click on the three dots-> more to find it.
- Explain that facilitators or speakers may screen-share slides and videos but for this they don't need to do anything.
- Put participants into breakout groups of 2 and 3, explain that they will need to click join and to ask their fellow participants what they've been up to recently.
 - Explain you will pull them back after a few minutes and they will get a notification of 60 seconds before they are pulled back to the main room- the host might also send reminders which will appear at the top of the screen. Remind them to be wary of this 60 second notification and any messages from the main room- these will pop up on their screen. If they miss these notifications, the facilitator will let them know during the sessions so don't worry too much.
- You can change your background in Zoom by clicking a little arrow next to 'start video' and it says "choose virtual background".
- You can change your name to first name only by hovering over your name and clicking 'rename'. (You can also do this by going to 'participants'- 'more' and then rename.) For the (event or workshop) make sure you have your first name and at least second initial so we can identify you coming into the meeting when you're in the waiting room. However, you can change it to 'anon' or just your first name during the main room sections for privacy.

	<ul style="list-style-type: none"> ○ They might want to do this for privacy reasons during any main room live-streaming so not to be identified. ● Explain that there may be polls used for voting. Showcase a pre-prepared poll by asking them to complete one and share the results. <ul style="list-style-type: none"> ○ <u>Phone/tablets</u>: it will take up the whole screen, you can click close and to click back into the poll results-> top left-hand in green writing.
00:25 (10 mins)	<p>Hardware, connection, device checks (including up-to-date system checks)</p> <ul style="list-style-type: none"> ● Go round the group and ask: <ul style="list-style-type: none"> ○ What device are they going to use for the (event or workshop)? ○ Does it have a camera? ○ Do they have any internet connection worries? (The host/notetaker will take a note.) ● Remind members to stay updated on their latest software updates <ul style="list-style-type: none"> ○ Doing this means that you will be able to access (the event or workshops), and ensure you don't experience any technical issues or difficulties. ○ An operating system is the software your device uses to enable you to use it. Examples include: Microsoft Windows, Mac OS, Android or iOS. See online security doc for more information on steps to follow for updates.
0:35 (15 mins)	<p>Introduction to the tools and open questions/discussion:</p> <ul style="list-style-type: none"> ● We're going to practically go through all of the tools we'll be using in the (event or workshops), please ask any questions as we go through. You will also be given links in a digital tools guide to some of these tools if you want to test and play about with them after this session. <p><u>Google Docs (basic)</u></p> <ul style="list-style-type: none"> ● Screen share the Google doc: https://docs.google.com/document/d/1G00F9bT8xQQ03RfA41sz466vqTVomwu-8KifN7sWCA/edit# <ul style="list-style-type: none"> ○ Google docs are commonly used for writing purposes and they're a great way to create and edit text documents right in your web browser—no special software is required. Even better, multiple people can work at the same time, you can see people's changes as they make them, and every change is saved automatically. ○ <u>Phone/tablet</u>: Be aware you can't use google docs on a tablet or phone without downloading google docs app but they can give it a go- these links will also all be provided by (add in key point of contact) to play around with after for extra practice. ○ Show how to sign out of a Google account (top right corner). Explain that if they may choose to sign out of all google personal accounts if they wish to stay anonymous in the top right hand corner. They should be able to appear as "anonymous racoon" or "anonymous badger" etc. ○ Tools: spelling & grammar to correct spelling, type etc.

	<ul style="list-style-type: none"> • Share this link into the chat and ask the group to click into this Google doc and try out the exercise to familiarise yourself with Google docs. https://docs.google.com/document/d/1G00F9bT8xQQ03RfA41sz466vgTVomwu_-8KifN7sWCA/edit# <ul style="list-style-type: none"> ◦ They do not need to sign up, this is a publicly open accessible document so anyone with the link can anonymously access and edit. <p><u>Google Jamboard</u></p> <ul style="list-style-type: none"> • Screen-share the Jamboard below https://jamboard.google.com/d/1P-SYeVE9gks_FtIkEhDzMC77yfmESksmUY21JbKuXEI/viewer?f=0 <ul style="list-style-type: none"> ◦ Google Jamboard is a virtual interactive whiteboard that can be used collaboratively to mind map and share ideas. What's Jamboard. ◦ Show how you can add 'sticky-notes' or ideas by clicking on the left hand side on the tools panel and a sticky note will appear. (You just need to type in your idea and click save. You can also change the colour at the top of the note or size of the sticky note by stretching the corners once you have saved it.) ◦ Similarly with Google Docs, explain that if they click in the link, they can sign out of all accounts if they wish to stay anonymous in the top right hand corner. They should be able to appear as "anonymous racoon" or "anonymous badger" etc. • Share this link into the chat and ask the group to click into the Jamboard link, complete the question and get familiar with the tool. Remind them not to delete anyone else's sticky notes. https://jamboard.google.com/d/1P-SYeVE9gks_FtIkEhDzMC77yfmESksmUY21JbKuXEI/viewer?f=0 <ul style="list-style-type: none"> ◦ They do not need to sign up, this is a publicly open accessible tool so anyone with the link can anonymously access and edit. ◦ Careful on tablet or phone- can move things about very easily ◦ Can click back button on phone to come back to Zoom ◦ Can click browser app to come back to Zoom <p><u>(Add in any other relevant digital tools that you will be using and how you will run it through with the group)</u></p>
00:50 (5 mins)	<p><u>Basic tips on keeping safe online</u></p> <ul style="list-style-type: none"> • If there are live streaming of the main room parts, you can switch your camera off, mute and change your name, if you feel uncomfortable being recorded. You will see a small red dot at the top of the screen if it is being recorded but the host should let you know at the start of the event or workshop. • On public platforms (i.e online forums/idea generation platforms, etc) just be aware not to share personal information about yourself as although this site is for participants the site is also public if the link is shared more widely. • Break-out discussions are not being recorded apart from main room livestreaming.

	<ul style="list-style-type: none"> • Be aware of eye strain, lighting, glare, sounds, stretching, taking small breaks, getting yourself in a comfortable seating position or standing if you wish. • Keeping your computer safe - updates and protection from viruses- please see online security and updates doc on updating your computer.
00:55 (5 mins)	<p><u>Further questions or issues</u></p> <ul style="list-style-type: none"> • Check if participants are happy, any concerns and requests for additional support will be captured at this stage. We will offer participants to join another tech session or schedule in 1-1's if need some more support • The host/notetaker will note down any tech issues or requirements.
01:00	Close

A template 'setting up your digital tools' guide for participants

Please note you will need to add or delete sections below based on the relevance to your event or workshop design.

Before the [\[add in what it is i.e an event or workshop\]](#)

- We'll ask you to test the digital tools you'll be using to participate, we have provided some links below to help you get started. You can either click into them or copy and paste the links into your browser (Safari, Chrome, Firefox, Edge). See 'digital setup' section below for further information.
- [\[You will be invited to join a technical induction to run through the tools below and test things\]](#)
- Email [\[add in point of contact\]](#) if you have any problems or concerns with your digital setup.

1-hour before the [\[add in what it is i.e an event or workshop\]](#)

- Set up your device in a comfortable area.
- Check your operating system and browser has been updated and internet connection is running ok. *An operating system is the software your device uses to enable you to use it. Software you may be using includes Microsoft Windows, Mac OS, Android or iOS. See 'online security & updates' guide for further information.
- Comfort tips: try to ensure you are sitting in a well-lit place, with plenty of fresh air. Be sure to have water beside you. Position your seat comfortably so you can sit upright instead of hunched over the screen. You may prefer to stand.

During the [\[add in what it is i.e an event or workshop\]](#), you can expect

- Online support [\[and experienced facilitators\]](#) (in case of any tech issues).
- A video call using the Zoom platform with facilitators and other participants, [\[including speakers\]](#). This will also involve online activities (don't worry, there will

be plenty of clear instructions and opportunities to ask for help) and facilitated online discussions in break-out rooms.

- Breaks away from the computer/screen to give you a chance to stretch, rest your eyes and top up refreshments!
- [Online tools for prioritisation and voting].

Digital set-up

Recommendations:

- Use a laptop or computer if you can.
- You'll need an internet connection – broadband through your phone line or fibre optic or a strong mobile internet connection such as 3G or 4G/LTE.
- Speakers and a microphone – built-in to most modern laptops and mobile devices or alternatively USB plug-in or wireless Bluetooth speakers and microphone for computers without these built in.
- A webcam or HD webcam - again, most modern laptops and mobile devices have these built in, however you can attach an external webcam.
- We recommend you use a web browser such as Google Chrome, Firefox or Opera as these ensure the tools we will be using function best for you. However, Safari, Microsoft Edge and Internet Explorer will still work but they may have limited functionality. We will also test the tools in your tech inductions for compatibility.

Zoom

During the citizen assemblies we will be using Zoom video conference software. More general information about Zoom is available here” <https://support.zoom.us/hc/en-us>

Instructions to set up Zoom

Before joining a Zoom meeting on a computer or mobile device, you can download the Zoom app from Zoom’s download centre here: <https://zoom.us/download> otherwise, you will be prompted to download and install Zoom when you click a join link [the join link will be sent to you by the host before the workshop or event takes place online]. Each meeting has a unique 9, 10, or 11-digit number called a meeting ID that will be required to join a Zoom meeting.

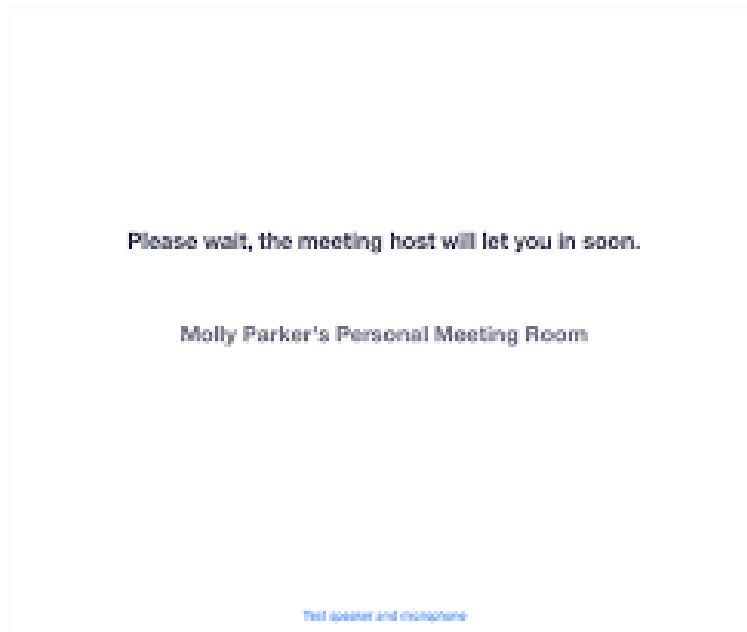
You can also join Zoom through a web browser, you just need to copy this link into your browser <https://zoom.us/join> and complete the meeting ID number and password. In Google Chrome and Mozilla Firefox, you can choose to always open links with Zoom, but this is not currently supported in Safari.

<https://support.zoom.us/hc/en-us/articles/201362593-Launching-Zoom-from-a-web-browser>

You can also join a test meeting to familiarize yourself with Zoom, and test your internet connection here: <https://zoom.us/test> . There will be no-one there, just yourself.

Step-by-step guide for using Zoom

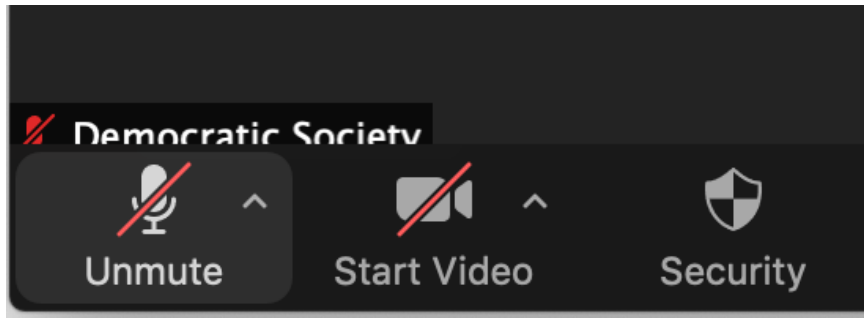
1. Invite. You will receive a meeting invite with a Zoom link and password by email from the host. When you click on the link you will be asked to type in the password- you can also copy and paste to do this.
2. Waiting room. Once you have done this, you will be taken to a 'waiting room'. The waiting room is for security reasons so the hosts of the event or workshop can check in participants and ensure everyone is there who should be and there are no 'intruders'.



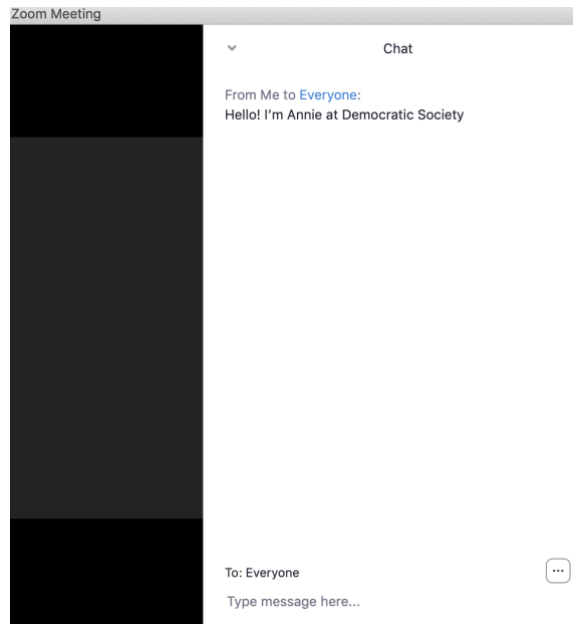
3. Once you are let into the conference room you will see everyone in the call (if they have their cameras switched on) a bit like this:



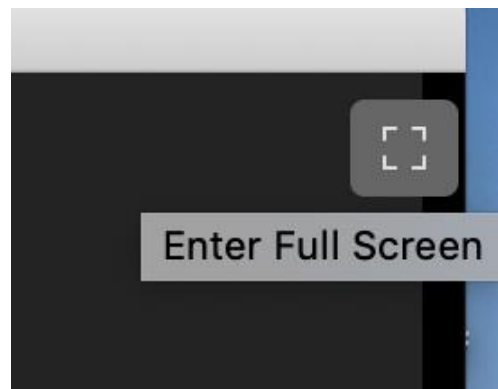
4. Mute and video. You may be asked to mute or turn your video off throughout the session to ensure speakers can be heard or if you are leaving your screen for a break. To mute click the button below on the bottom left-hand corner of the screen.



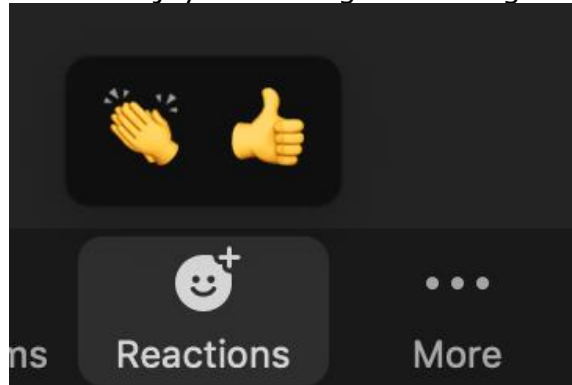
5. Chat function. You may be asked to use the chat function available on the bottom menu to ask questions or share thoughts. It will pop up here like this. Please note that you can send personal messages to individual members through this function but the host can view them at the end of the session.



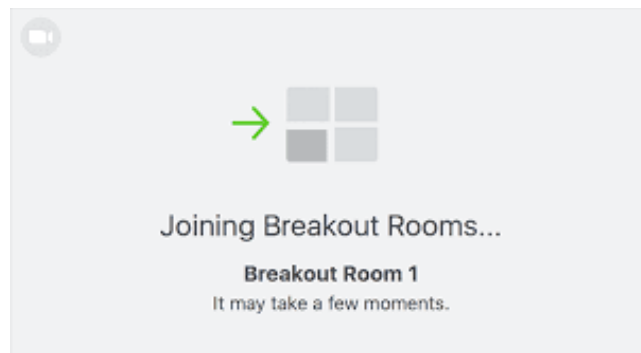
6. Size of screen. You can also minimise or maximise screen if at any point you need to see multiple tools such as a Google document at once. You can do this at the top right corner or drag the corners of the page to expand.



7. There is also a reaction function in Zoom. There are clap and thumbs up options and these can be useful if you have enjoyed hearing something but need to stay on mute.



8. Break-out rooms. You may be moved into break-out rooms during your Zoom sessions. For this you do not need to do anything, your host will do this for you but you will need to click join and after you may receive a notice like this below. The main host may also send time reminders or group messages to the whole event or workshop whilst you are in a break-out room.



9. Polls. You may get asked to complete a poll in Zoom. This will pop up on your screen and the facilitator will let you know what to do.

Poll 1: CA test poll

1. Did you hear the thunder last night?

Yes

No

What thunder? I don't live in Edinburgh

10. Screen-sharing. Facilitators or public speakers throughout the event or workshop may screen-share with you some slides, visuals and videos, for this you don't need to do anything but sit back, relax, watch and listen but please remember to turn your microphone off.

Using Zoom on a mobile device

Please note that if you are using Zoom on a mobile phone or tablet, some features and menu options may look different. Please watch this handy tutorial to help you:

https://www.youtube.com/watch?v=sOJkffIN8O4&feature=emb_logo

Other tools we'll be using during the [add in what it is i.e an event or workshop]

Throughout the [add in what it is i.e an event or workshop] you may get asked to open up a Google doc, use Google Jamboards or do some online voting [delete/add in any further digital activities].

If you have any issues using these tools during your tech induction or before the [add in what it is i.e an event or workshop] you can let [add in point of contact or community representative] know. Your facilitator will also ensure that you are still able to participate in the online activities and help you when you need it.

Here is a list of the digital tools to expect, what they are typically used for and step-by-step instructions on how to use them:

Google documents (docs)

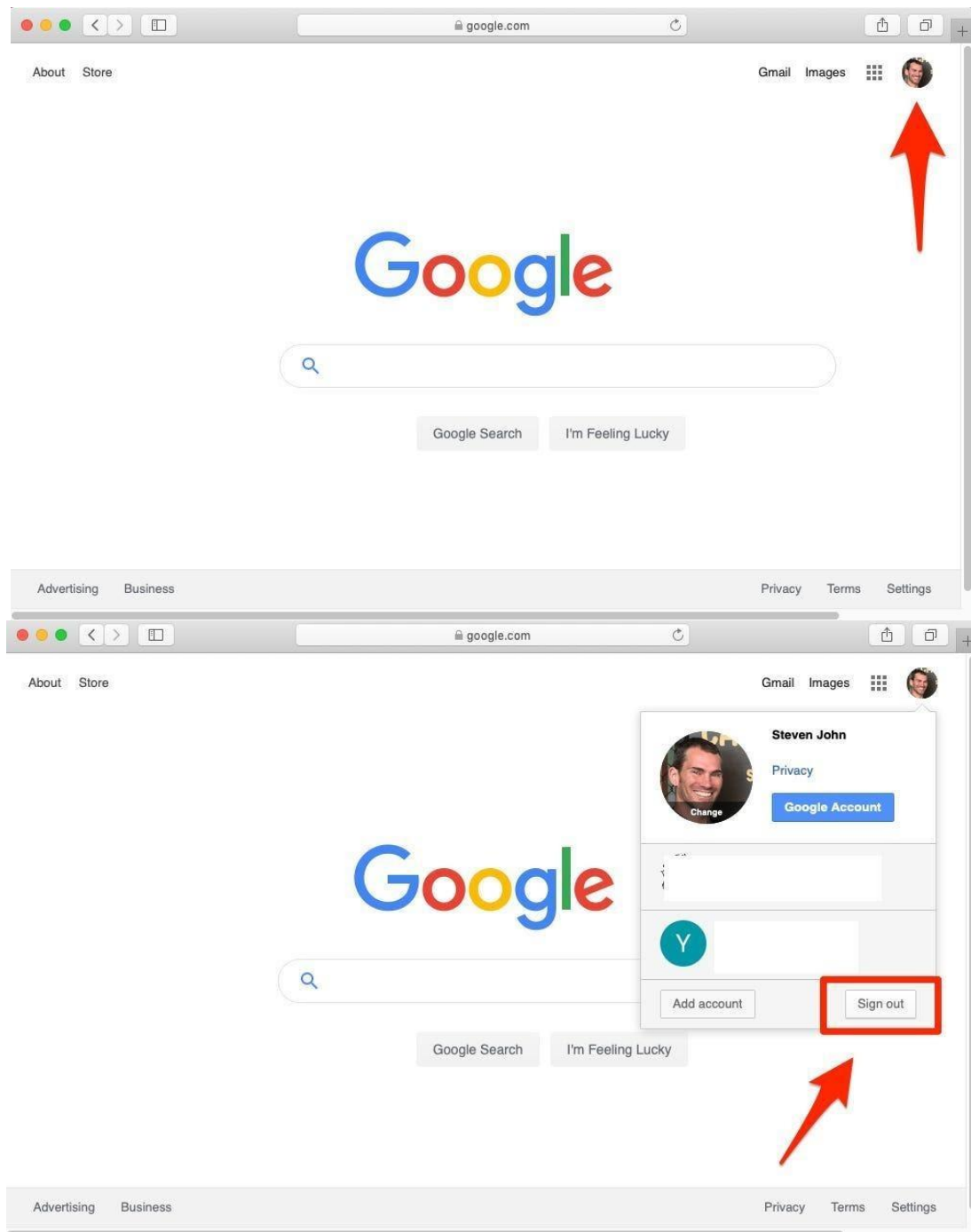
Google docs are commonly used for writing purposes and they're a great way to create and edit text documents right in your web browser—no special software is required. Even better, multiple people can work at the same time, you can see people's changes as they make them, and every change is saved automatically.

Please feel free to click into this Google

doc: https://docs.google.com/document/d/1GO0F9bT8xQQ03RfA41sz466vqTVomwu_-8KifN7sWCA/edit# and try out the exercise we have set up to familiarise yourself with Google docs. There may be others who are in the doc at the same time or who have completed the exercise.

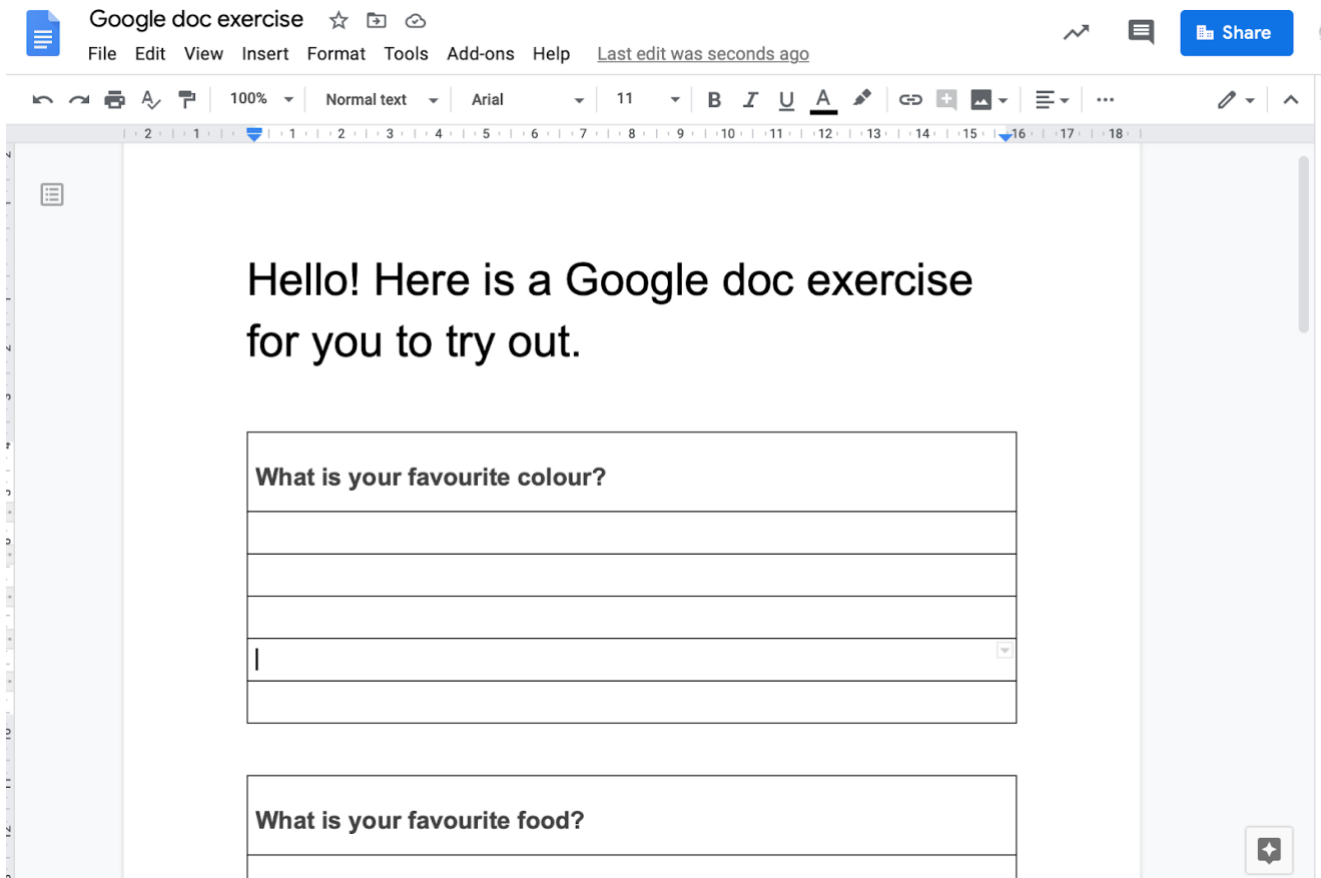
You do not need to sign up, this is a publicly open accessible document so anyone with the link can access and edit.

If you already have a google account, you can choose to sign out of all google personal accounts if you wish to stay anonymous in the top right-hand corner of Google or the Google doc. Please see below:



You should be able to appear as “anonymous racoon” or “anonymous badger” etc at the top right hand corner of the doc.

You do not need to sign up to use any of the Google docs that we will use in the online assembly sessions.

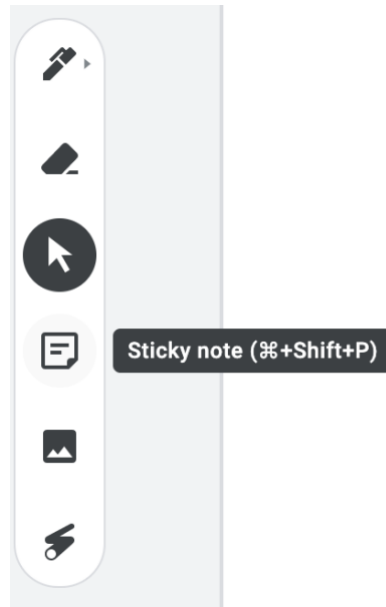


Google Jamboard

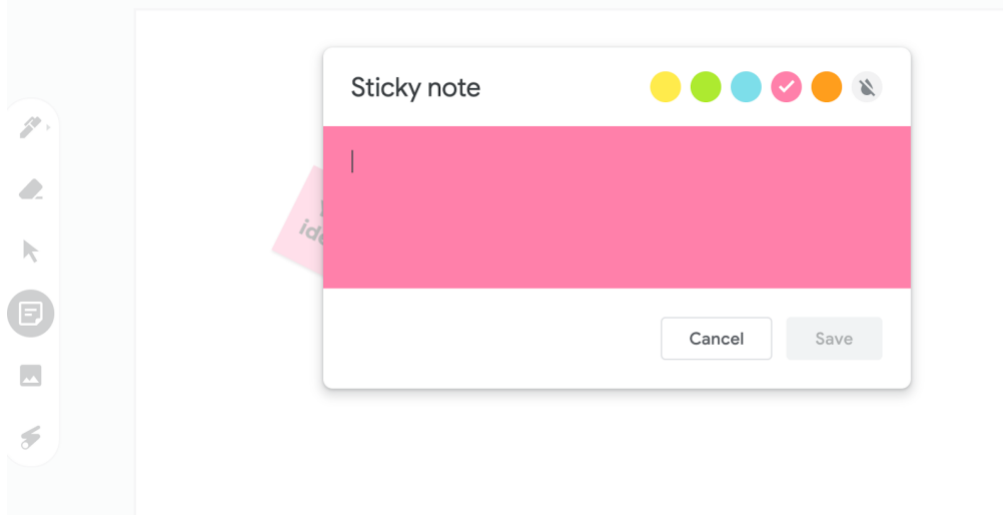
Google Jamboard is a virtual interactive whiteboard that can be used collaboratively to mind map and share ideas. More information about Jamboard is available here:

<https://support.google.com/jamboard/answer/7424836?hl=en>

You can add 'sticky-notes' or ideas by clicking on the left-hand side on the tools panel and a sticky note will appear like this.

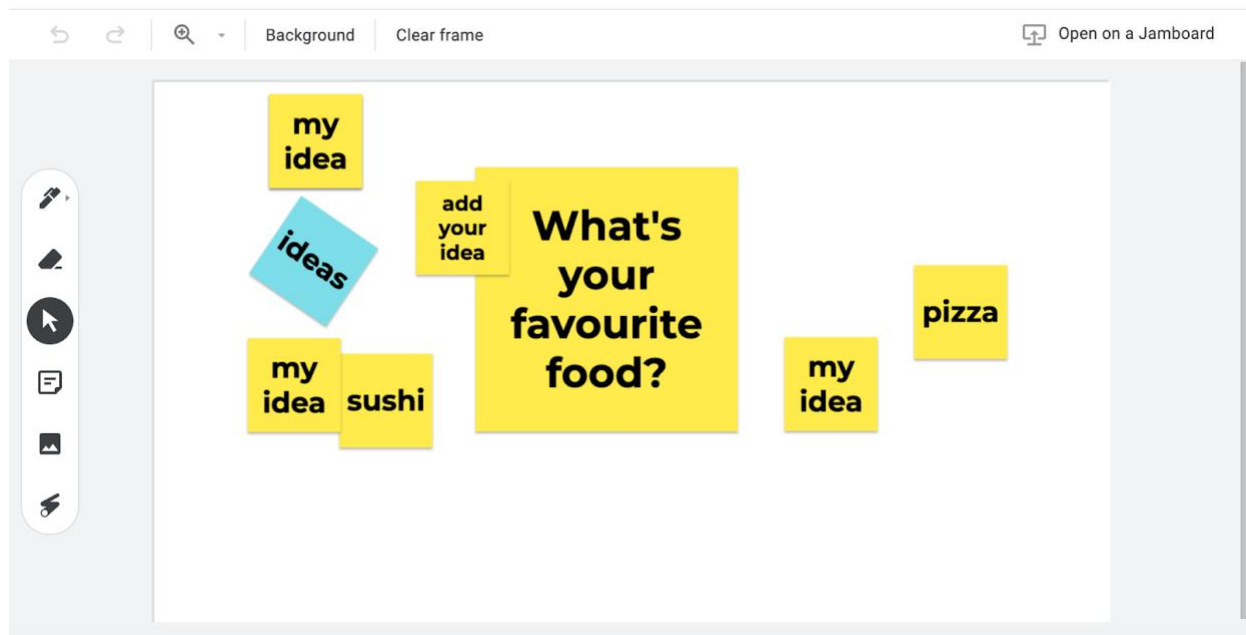


You just need to type in your idea and click save. You can also change the colour at the top of the note or size of the sticky-note by stretching the corners once you have saved it. To get out of the sticky-note, just click cancel, then you can move your note around on the board.



Please feel free to click into this Jamboard link: https://jamboard.google.com/d/1P-SYeVE9gks_FtIkEhDzMC77yfmESksmUY21JbKuXEI/viewer?f=0 to answer the question we have asked and get familiar with the tool. Y

You do not need to sign up, similarly with google docs, this is a publicly open accessible tool so anyone with the link can access and edit. You won't need to sign up to use any of the Jamboards that we will use in the online [add in what it is i.e workshop or event].



Facilitators may send you a link to a Jamboard in the Zoom chat function in your session or in advance if it is required.

Accessibility options for these digital tools

- Closed Captions in Zoom: There is the option to have closed captions throughout the Zoom session where you can read what is being said live on the screen.
- Screen Reader Support in Zoom: You can use Zoom without being able to see the screen. Zoom follows the latest accessibility standards to ensure that the product is fully accessible to the latest screen readers.
- More information about Zoom's accessibility features is available here: <https://zoom.us/accessibility>
- Google docs also has screen reader support. First, make sure that you've turned on Docs screen reader support: <https://support.google.com/docs/answer/6282736>
- If you're using a Windows computer or Chromebook with touch input, follow the tips for using touch input with a screen reader: <https://support.google.com/docs/answer/6282736?co=GENIE.Platform%3DDesktop#touch>

What is a browser or web browser?

A browser is a computer program with a graphical user interface for displaying HTML files, used to navigate the World Wide Web or "a web browser".

You may recognise which browser you use from the icons



below:

Google Chrome:



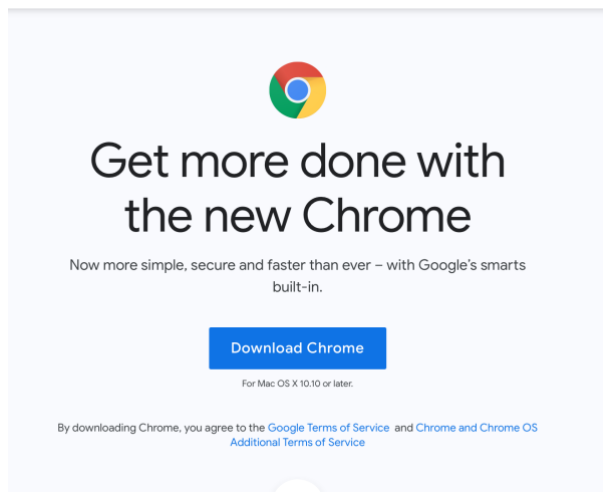
Firefox:



Opera:



*Please note: one of the tools we'll be using- Google Jamboard is fully supported by Google Chrome as a web browser. Web browsers such as Microsoft Edge, Mozilla Firefox, Safari and Internet Explorer have more limited functionality but still work. You can install the Chrome browser here if you wish: <https://www.google.co.uk/chrome/> however we will also test Google Jamboards in your technical inductions for compatibility.



To uninstall a browser you need to ensure the browser isn't running. If the program is in your Dock, right-click the browser i.e Chrome, then select Quit. For a Windows computer please have a look at this guide here: <https://macpaw.com/how-to/uninstall-browser-pc>

To uninstall a browser i.e Chrome on a Mac computer please have a look at this guide here: <https://www.lifewire.com/uninstall-google-chrome-mac-4581498>

A template online security & updates guidance for participants

Please note you will need to add or delete sections below based on the relevance to your event or workshop design.

Introduction

It is vital that participants install the latest operating system updates on your device and have the appropriate level of protection from viruses and other digital threats.

By ensuring you have the latest available software updates, it means that you will be able to access [add what it is i.e online workshop or event], and ensure you don't experience any technical issues or difficulties.

An operating system is the software your device uses to enable you to use it. Software you may be using includes Microsoft Windows, Mac OS, Android or iOS.

What operating system have I got?

Below we have set out the various most common operating systems. It is likely that you will be using one of these systems. Please follow the instructions to make sure your computer or mobile device is up to date based on the operating system you are using.

Mac OS



Key features: application icons (images) along the bottom, Apple logo in top left corner.

Microsoft Windows



Key features: 'start' button in bottom left corner, time and date in bottom right corner, application icons (images) along the bottom.

iOS (Apple iPhone, Apple iPad)



Android (Samsung, HTC and other mobile devices that are not iPhone/iPad)



Making sure your system is up to date

Now that you have identified the operating system you are using on your device, the steps below will show you how to make sure it is up to date with the latest software updates - ensuring your device works correctly and is secure.

Please follow the steps related to your device operating system.

Mac OS

1. Choose System Preferences from the Apple menu (click the Apple logo in top left corner), then click Software Update to check for updates.



2. If any updates are available, click the Update Now button to install them. Or click "More info" to see details about each update and select specific updates to install.

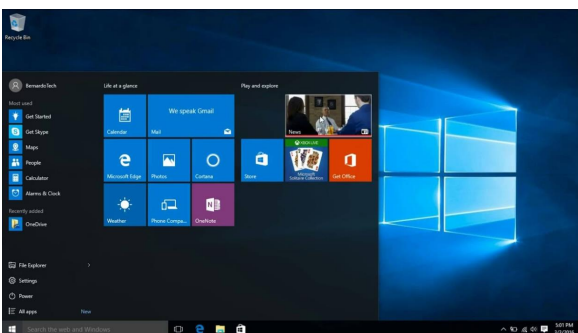


3. When Software Update says that your Mac is up to date, the installed version of macOS and all of its apps are also up to date. That includes [Safari](#), [iTunes](#), Books, Messages, Mail, Calendar, Photos, and FaceTime.

To automatically install macOS updates in the future, including apps that were downloaded separately from the App Store, select "Automatically keep my Mac up to date." Your Mac will notify you when updates require it to restart, so you can always choose to install those later. We recommend that you tick this box.

More information [can be found here](#).

Microsoft Windows



It is very straightforward to make sure your device is running the most up to date version of Windows.

In Windows 10, you decide when and how to get the latest updates to keep your device running smoothly and securely.

To manage your options and see available updates, click here > [Check for Windows updates.](#)

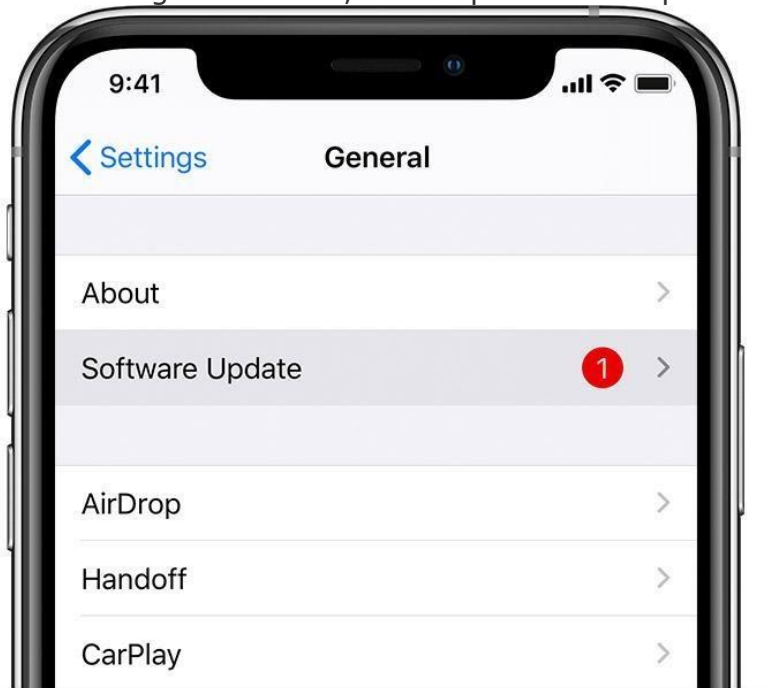
Or follow these steps below:

1. Select the Start button (bottom left corner).
2. Go to Settings > Update & Security > Windows Update.
3. If an update is available for your device, you will see a button to download or install updates. Click this.
4. You may be prompted to restart your device to finish installing the updates.

iOS (Apple iPhone/iPad)

If a message says that an update is available, tap Install Now. You can also follow these steps:

1. Plug your device into power and [connect to the Internet with Wi-Fi](#).
2. Go to Settings > General, then tap Software Update.



3. Tap Download and Install. If a message asks to temporarily remove apps because the software needs more space for the update, tap Continue or Cancel. Later, iOS or iPadOS will reinstall apps that it removed. If you tap Cancel, [learn what to do next](#).
4. To update now, tap Install. Or you can tap Later and choose Install Tonight or Remind Me Later. If you tap Install Tonight, just plug your device into power before you go to sleep. Your device will update automatically overnight.
5. If asked, enter your passcode. If you don't know your passcode, [learn what to do](#).

If you see an error or need more space when updating wirelessly

If you see an error message while trying to update your device wirelessly, [learn what to do](#). If you need more space for a wireless update, you can [update using your computer](#) or [delete content manually](#) from your device. Whether you use your computer or update wirelessly, you'll have the same amount of free space on your device after you update.

Android (Samsung, HTC and other mobile devices that are not iPhone/iPad)



When you get a notification, open it and tap the update action. If you cleared your notification or your device has been offline:

1. Open your device's Settings app.
2. Near the bottom, tap System > Advanced > System update.
3. You'll see your update status.
4. Follow any steps on the screen.

Get security updates and Google Play system updates

Most system updates happen automatically. To check if an update is available:

1. Open your device's Settings app.
2. Tap Security.
3. Check for an update:
 - To check if a security update is available, tap Security update.
 - To check if a Google Play system update is available, tap Google Play system update.
4. Follow any steps on the screen.

Protection from viruses

We recommend that you also have the latest versions of virus protection installed if the device you are using is a laptop or computer.

- For Windows laptops and computers, [follow these steps](#).
- For Mac OS (Apple laptops and computers), security is built in with the latest software updates (by following the steps above) and you shouldn't need to do anything else if

you have the latest operating system updates installed. More information [is available here](#).

Privacy & safety

Less is more

When completing a profile for an account, you don't have to fill in everything. Limit what information you put online. If it isn't required, don't add it. And if an app or account does require information you don't feel comfortable submitting, then reconsider creating a profile with that app.

Protecting your identity

Be careful when providing your personal information online. In particular, do not make too much personal information available to lots of people, for example by having open access on social networking sites. Your personal information can be used to steal your identity and commit fraud. Be wary of anyone who asks for your bank or credit card details, and only use secure sites when shopping online – secure sites usually carry the green padlock symbol in the address bar. However, this on its own is not a guarantee that you're visiting the site you think you are – make sure the address for the website is the one you would expect as well.

Be careful when providing your:

- Full name
- Full address
- Date of birth
- Telephone number
- National insurance number
- School/ workplace
- Birthplace
- Previous addresses
- Bank account details or payment card details
- Account information

Passwords

When choosing a password, avoid obvious choices such as mother's maiden name, child's name, pet's name, or other references that someone may be able to find out through information you have posted elsewhere. Try to use random mixtures of numbers and letters. Use different passwords for different sites.

If you have any problems, questions or need help

If you run into trouble, we're here to help. Please email [\[add key point of contact\]](#) and someone will be able to help you.

—

A template for using different tools on different devices participants

Please note you will need to add or delete sections below based on the relevance to your event or workshop design.

A guide for joining and using Zoom depending on what device you are using. If you require any more support on setting up and using any of the online tools please get in contact with [\[add your point of contact\]](#)

How to rename yourself, before joining the Zoom meeting

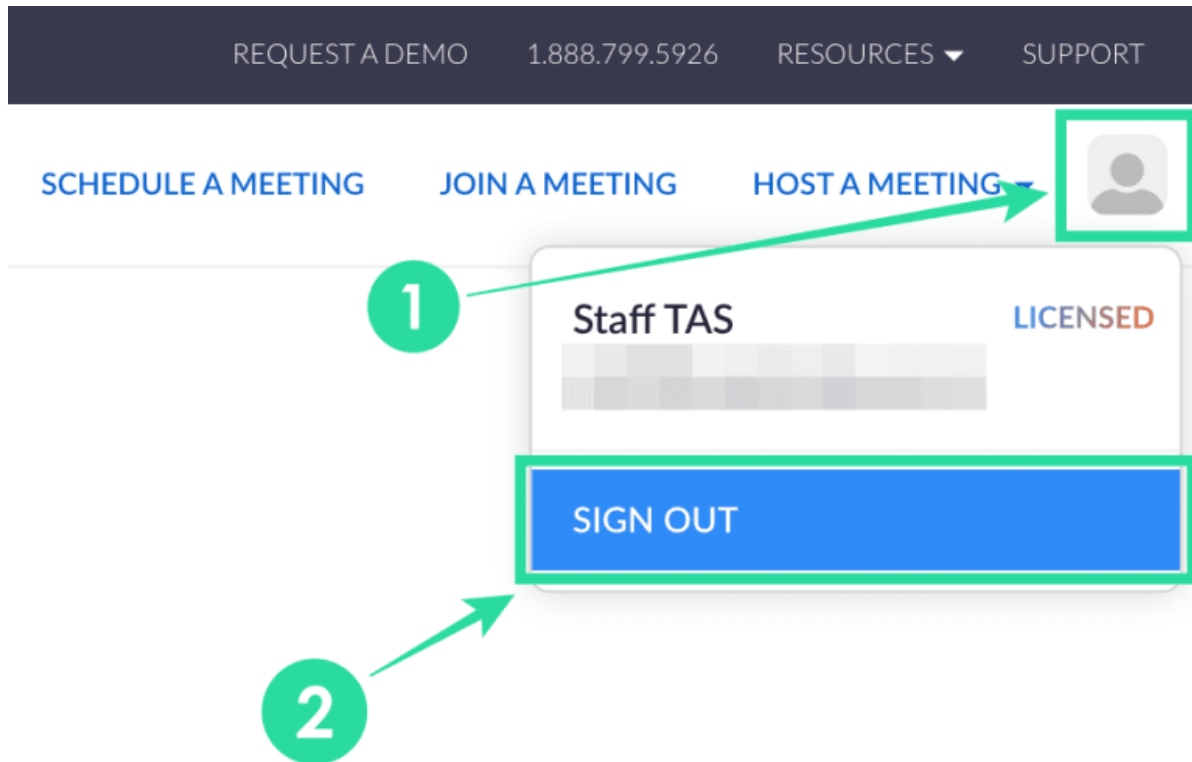
Important information

For the [\[add what it is i.e event/workshop\]](#) we recommend you join the meeting using your real, full-name if possible or at least first name and second initial (i.e John.S) so we can easily identify you when you are in the waiting room of the Zoom call. [\[You can change your name whilst live-streaming is about to happen and we will notify you and allow you time to change your name for this or alternatively as hosts, we can change it for you if you let us know in advance\]](#).

To change the way your name is displayed, check you are signed out of Zoom accounts, for instance, if you are signed in as someone else if you are using someone else's device. You can rename yourself by signing out of your Zoom account and then joining the meeting with a new name. You can do this when joining meetings on your PC (through the web or when using the desktop app) or on your phone.

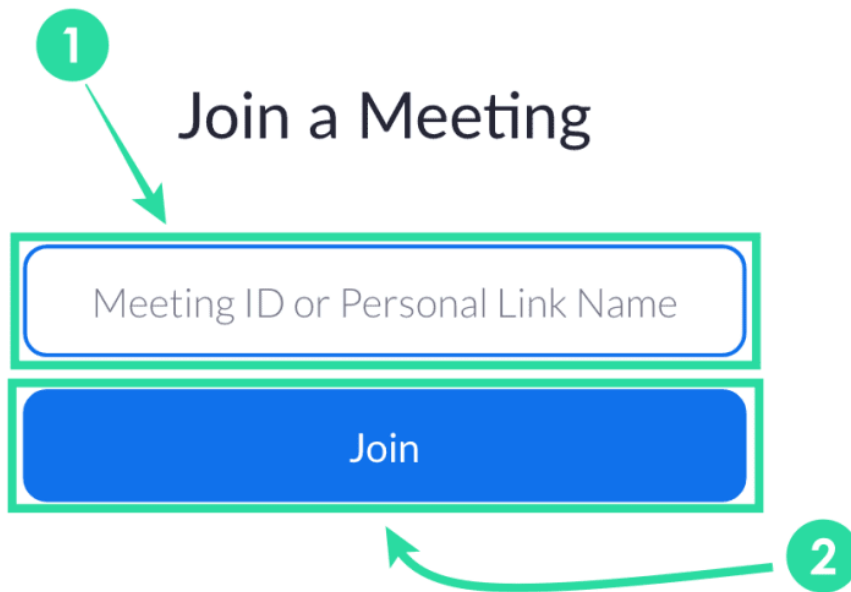
On a web browser

Step 1: Sign out of your Zoom account if you are signed in (for instance as someone else if on someone else's device) by clicking your profile picture from the top right corner and selecting the 'Sign Out' option.

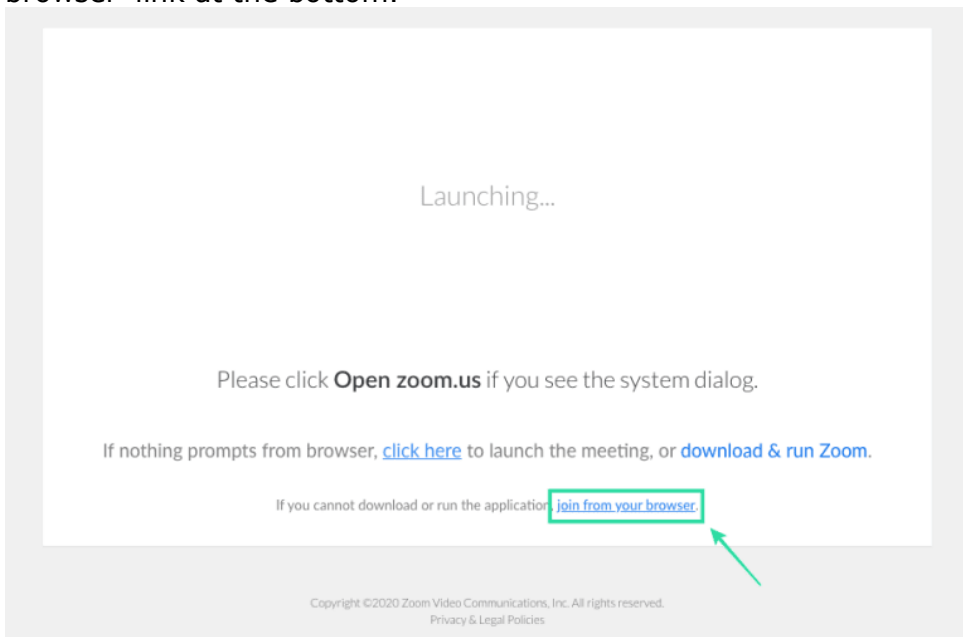


Step 2: After you're signed out of your account, click on the 'Join a meeting' at the top.

Step 3: On the next page, enter the meeting ID or Personal link name from the email provided by Secretariat and then click on the Join button.



Step 4: If you wish to join the meeting from your web browser, click on the 'Join from your browser' link at the bottom.



Step 5: In the next screen, you can enter the name you want to use for the meeting under 'Your Name' and then click on Join.

1

Join a Meeting

Your Name

2

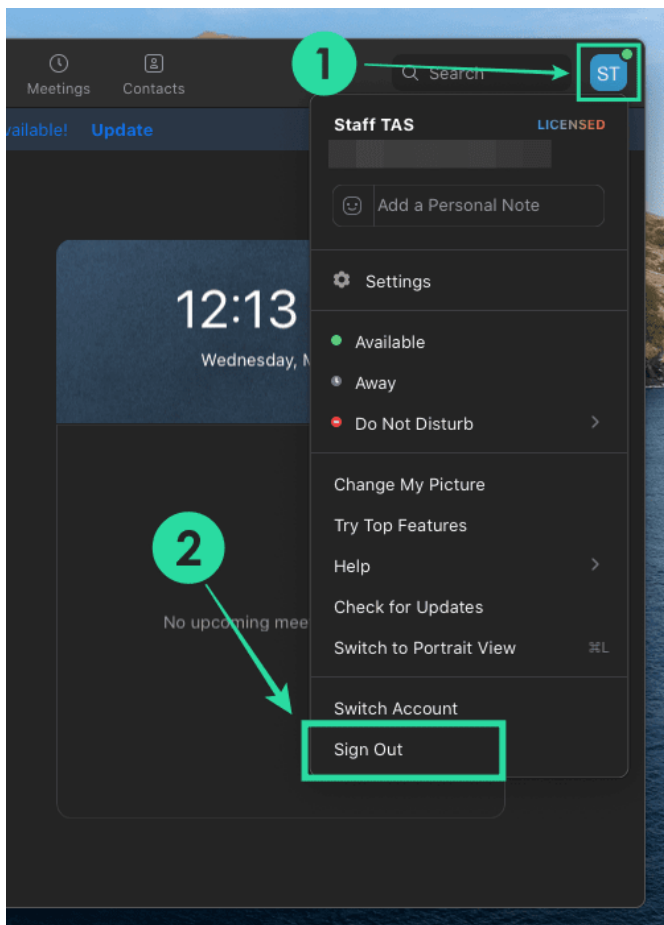
✓ I'm not a robot

reCAPTCHA
Privacy - Terms

That's it! You will now have a new name inside the meeting.

On a computer

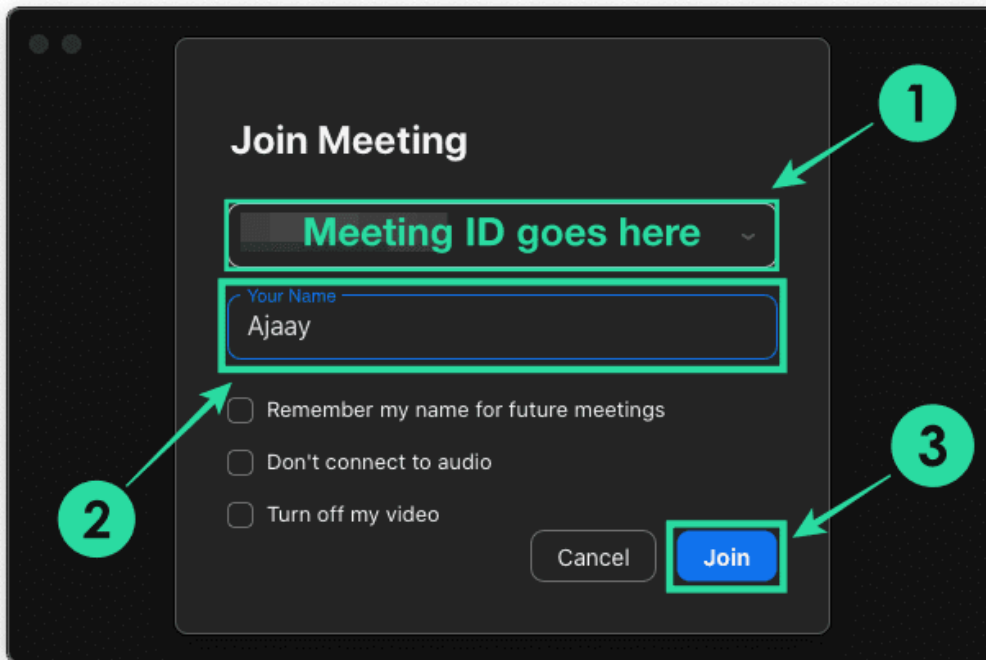
Step 1: On the Zoom desktop app on your PC, click on the profile picture at the top right corner and then select 'Sign Out'.



Step 2: When you're logged out of your account, click on the 'Join a Meeting' button.



Step 3: In the next screen, Enter the meeting ID that was shared with you and the name you want to assign yourself during the meeting session. After you have entered these details, click on the 'Join' button.



You will be asked to enter the meeting password, if any, and after that the meeting screen will show your name as the one you assigned for yourself before joining.

On a phone

*Please note that phones vary depending on the brand but this is some guidance on how you can rename yourself before joining a Zoom meeting.

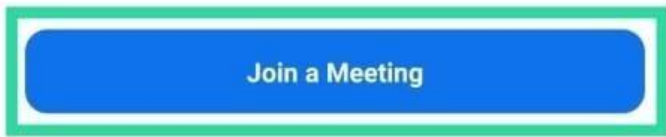
Step 1: On the Zoom app on your phone, tap on the Settings tab at the bottom, and then select the account name at the top.



Step 2: Inside the 'My Profiles' screen, scroll down, tap on the 'Sign Out' button at the bottom and confirm by tapping 'Yes' in the dialog that follows.



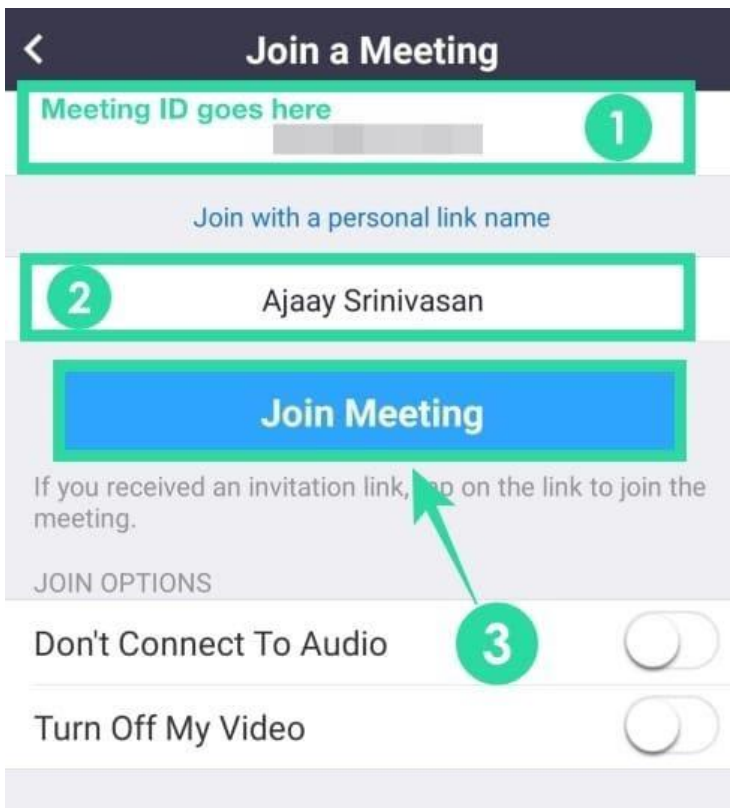
Step 3: After you're logged out of your account, tap on the 'Join a Meeting' button.



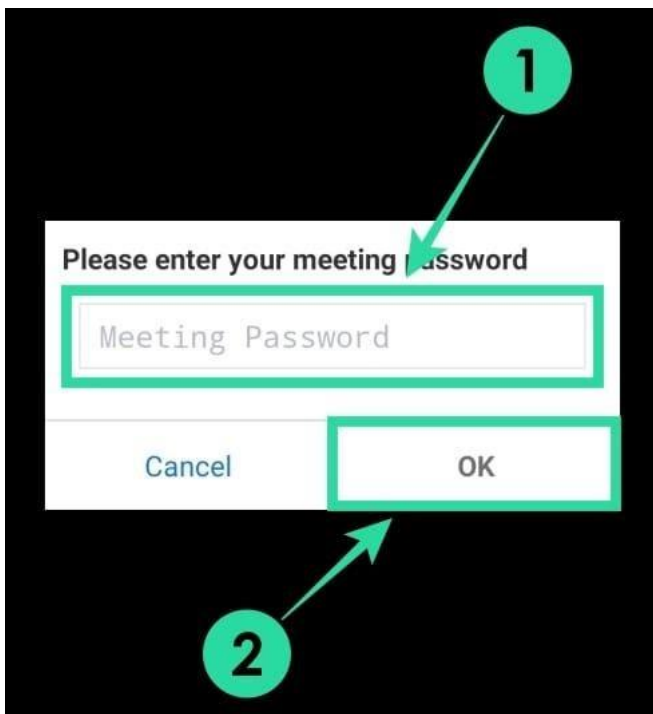
Sign Up

Sign In

Step 4: Enter the Meeting ID and the name you want to assign yourself for the meeting. After entering these details, tap on the 'Join Meeting' button.



Step 5: You will be asked to enter the meeting password. Enter the password and tap on OK.



Step 6: Choose if you want to join with the video turned ON or OFF.

After that, the meeting screen will show your name as the one you assigned for yourself before joining.

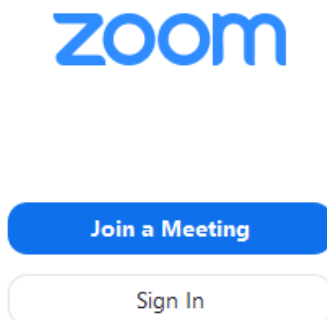
Test Zoom

You can join a test meeting to familiarize yourself with Zoom and test your internet connection here: <https://zoom.us/test> . There will be no-one there, just yourself.

Mac OS/Apple computer or laptop

Joining Zoom on an Apple computer/laptop (*to join from a web browser, please go to p.19)

1. Sign in to the Zoom app



2. After launching Zoom, click Join a Meeting to join a meeting without signing in. You will be asked to type in your display name as explained on p.2, please provide your full name so we can easily identify you in the waiting room. Learn more here:

<https://support.zoom.us/hc/en-us/articles/201362193-Joining-a-Meeting>

3. Start or join a meeting.

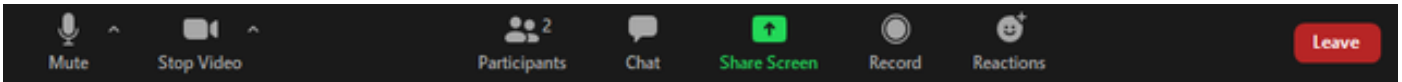
4. Click Speaker View or Gallery View in the top-right corner.

Note: During plenary sessions of the Assembly as there will be a large number of participants, you may need to change to full screen or adjust the size of your window to accommodate all the thumbnails (i.e. the pictures of the people participating in the call).

Learn more here: (https://support.zoom.us/hc/en-us/articles/201362323-Changing-the-video-layout?fbclid=IwAR0N5qWkbJdtSUn9HvWBCrNf1hYSWVTz9myTK4thbCASXCFNYZfWZvYMODc#h_e64dbc14-fdcf-492b-8c65-6e918a7d8952)

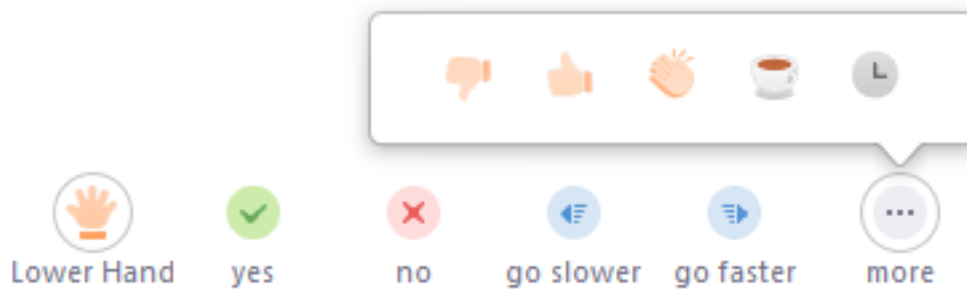
Using Zoom on an Apple computer/laptop

1. The attendee controls in the image below appear at the bottom of your screen.



Attendees have access to these features:

2. Mute / Unmute: Mute and unmute your microphone.
3. Audio Controls (click the ^ arrow next to Mute / Unmute): Allows you to change the microphone and speaker that Zoom is currently using on your computer, leave computer audio, and access the full audio settings. Learn more here: <https://support.zoom.us/hc/en-us/articles/201362623-About-Settings>
 Alternatives are:
 - a) Use the following keyboard shortcuts to mute or unmute yourself. Learn more here: <https://support.zoom.us/hc/en-us/articles/205683899>
 Mac: Shift + Command + A
 - b) You can also use push to talk if you want to unmute yourself by holding the spacebar. Learn more here: <https://support.zoom.us/hc/en-us/articles/360000510003>
4. Start Video / Stop Video: Turns your camera on or off.
5. Video Controls (click the ^ arrow next to Start Video / Stop Video): Change cameras if you have multiple cameras, select a virtual background (if enabled) Learn more here: <https://support.zoom.us/hc/en-us/articles/210707503-Virtual-Background> , or access your full video settings. Learn more here: <https://support.zoom.us/hc/en-us/articles/201362623-About-Settings>
6. Reactions: add a reaction with a thumbs up or clapping icon
7. Participants: See who's currently in the meeting and invite others. Learn more here: <https://support.zoom.us/hc/en-us/articles/201362183> You can also access to these options:
 - a) Rename: Hover over your name, click More, and choose Rename to change your screen name displayed to other participants.
 - b) Non-verbal feedback icons (if enabled by the host): Places an icon beside your name to quickly notify the host. Learn more here: <https://support.zoom.us/hc/en-us/articles/115001286183>



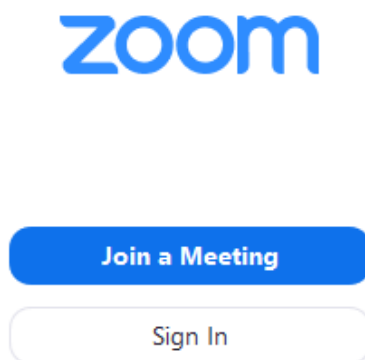
8. Share Screen: Start a screen share (if the host allows). You will be able to select the desktop or application you want to share.

9. Chat: Access the chat window to chat with the participants. Learn more here: <https://support.zoom.us/hc/en-us/articles/203650445-In-Meeting-Chat>
10. Leave: Leave the meeting while it continues for the other participants. Only the host can end the meeting. Learn more here: <https://support.zoom.us/hc/en-us/articles/201362603-Host-Controls-in-a-Meeting>

Windows PC computer or laptop

Joining zoom on a Windows PC (*to join from a web browser, please go to p.19)

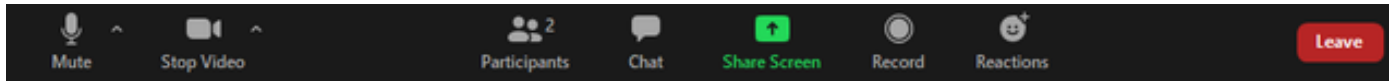
1. Sign in to the Zoom app.



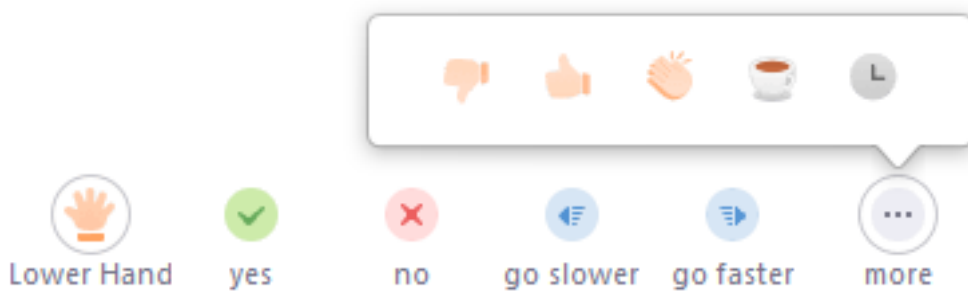
2. After launching Zoom, click Join a Meeting to join a meeting without signing in. You will be asked to type in your display name as explained on p.2, please provide your full name so we can easily identify you in the waiting room. Learn more here: <https://support.zoom.us/hc/en-us/articles/201362193-Joining-a-Meeting>
2. Start or join a meeting.
3. Click Speaker View or Gallery View in the top-right corner. Note: During the main event there may be a large number of participants, you may need to change to full screen or adjust the size of your window to accommodate all the thumbnails (i.e. the pictures of the people participating in the call). Learn more here: (https://support.zoom.us/hc/en-us/articles/201362323-Changing-the-video-layout?fbclid=IwAR0N5qWkbJdtSUn9HvWBCrNf1hYSWVTz9myTK4thbCASXCFNYZfWZvYMODc#h_e64dbc14-fdcf-492b-8c65-6e918a7d8952)

Using Zoom on a Windows PC

1. The attendee controls appear at the bottom of your screen if you're not currently screen sharing.



2. Attendees have access to these features:
3. Mute / Unmute: Mute and unmute your microphone.
4. Audio Controls (click the ^ arrow next to Mute / Unmute): Allows you to change the microphone and speaker that Zoom is currently using on your computer, leave computer audio, and access the full audio settings. Learn more here: <https://support.zoom.us/hc/en-us/articles/201362623-About-Settings>
 - a. Tip: Use the following keyboard shortcuts to mute or unmute yourself. Learn more here: <https://support.zoom.us/hc/en-us/articles/205683899>
Windows: Alt + A
 - b. You can also use push to talk if you want to unmute yourself by holding the spacebar. Learn more here: <https://support.zoom.us/hc/en-us/articles/360000510003>
5. Start Video / Stop Video: Turns your camera on or off.
6. Video Controls (click the ^ arrow next to Start Video / Stop Video): Change cameras if you have multiple cameras, select a virtual background (if enabled) Learn more here: <https://support.zoom.us/hc/en-us/articles/210707503-Virtual-Background> , or access your full video settings. Learn more here: <https://support.zoom.us/hc/en-us/articles/201362623-About-Settings>
7. Reactions: add a reaction with a thumbs up or clapping icon
8. Participants: See who's currently in the meeting and invite others. Learn more here: <https://support.zoom.us/hc/en-us/articles/201362183> You can also access to these options:
 - Rename: Hover over your name, click More, and choose Rename to change your screen name displayed to other participants.
 - Non-verbal feedback icons (if enabled by the host): Places an icon beside your name to quickly notify the host. Learn more here: <https://support.zoom.us/hc/en-us/articles/115001286183>



8. Share Screen: Start a screen share (if the host allows). You will be able to select the desktop or application you want to share.

9. Chat: Access the chat window to chat with the participants. Learn more here: <https://support.zoom.us/hc/en-us/articles/203650445-In-Meeting-Chat>

10. Leave: Leave the meeting while it continues for the other participants. Only the host can end the meeting. Learn more here: <https://support.zoom.us/hc/en-us/articles/201362603-Host-Controls-in-a-Meeting>

Android (mobile/tablet)

*Please note that joining Zoom and using the online tools on a mobile or tablet is not as easy than on a computer or laptop.

Joining Zoom on an android (*to join from a web browser, please go to p.19)

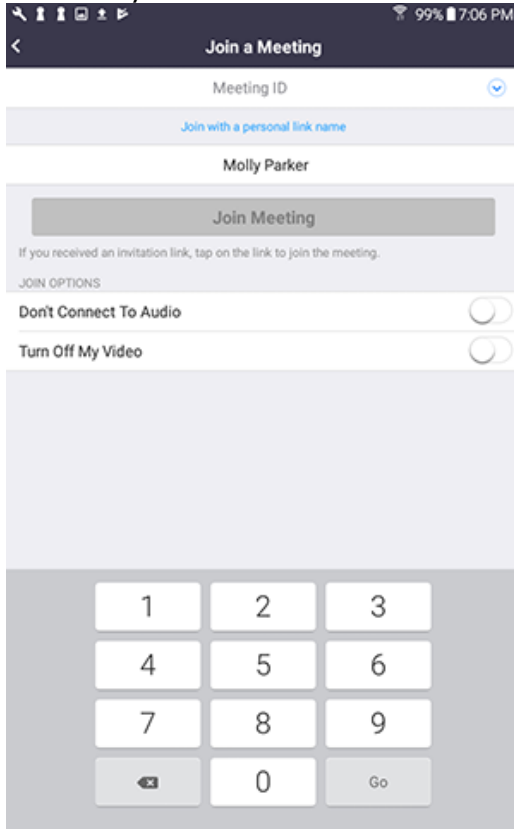
1. Open the Zoom mobile app. If you have not downloaded the Zoom mobile app yet, you can download it from the Google Play Store.
2. Join a meeting using one of these methods:
 - Tap Join a Meeting if you want to join without signing in.
 - Sign in to Zoom then tap Join.



Join

3. Enter the meeting ID number and your display name. <https://support.zoom.us/hc/en-us/articles/201362373-What-is-a-Meeting-ID->
 - If you're signed in, change your name if you don't want your default name to appear. Please use your full name so we can easily identify you in the waiting room. <https://support.zoom.us/hc/en-us/articles/201363203>
 - If you're not signed in, enter your display name.

4. Select if you would like to connect audio and/or video and tap Join Meeting.



Using Zoom on an Android

1. The attendee controls appear at the bottom of your screen, except for 'Leave meeting' which appears at the top-right corner.



2. Mute / Unmute: Mute or unmute your microphone.
3. Video: Start and stop your own video.
4. Share: Start a screen share. You'll be able to select what you want to share. [Learn more.](#)
5. Participants: See who's currently in the meeting. Non-verbal feedback icons (if enabled by the host). Tapping an icon will notify the host by placing the icon beside your name in the participants list. For example, the hand icon places the raise hand icon beside your name and simulates a hand raise. The participants list also gives you access to these options:
 - Tap your name if you want to rename yourself.
 - Invite: Invite others to join your meeting.
 - Chats: Chat with other participants. [Learn more.](#)

- To access the chat, while in a meeting, tap the screen to make the controls appear.
- Tap and click on the More/three dots at the bottom right of your screen and click chat. This will take you away from the main screen and here you can type a message to everyone. Hit 'close' on the top left corner to return to the main meeting screen.



- You can type your chat message and click Send, or if you want to change who it is being sent to, click the arrow next to Send to: and choose a different person or group of people.
- Incoming chats will be displayed at the bottom of your screen and you can click on Participants then Chat to view them.



6. Reactions: To add a reaction, tap and click on the three dots on the bottom right and you should have some emojis such as clapping and thumbs up.
7. To see everyone in the call you can tap on the screen and it brings up the menu for gallery or speaker view. With lots of people on the call you should be able to swipe left or right to see more people. By default, the Zoom mobile app displays the active speaker view. If one or more participants joins the meeting, you will see a video thumbnail in the bottom-right corner.



- 8. Swipe left from the active speaker view to switch to gallery view.
- 9. You can view up to 4 participants' video at the same time. You can keep swiping left to view more participants' video.



- 10. Swipe right to the first screen to switch back to active speaker view.



IOS (iphone & ipad)

*Please note that joining Zoom and using the online tools on a mobile or ipad is not as easy than on a computer or laptop.

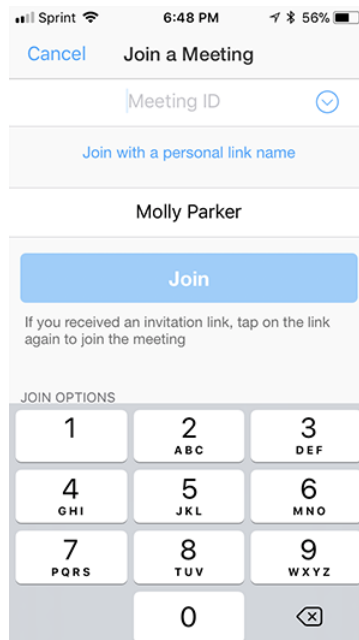
Joining Zoom on iPhone/iPad (*to join from a web browser, please go to p.19)

1. Open the Zoom mobile app. If you have not downloaded the Zoom mobile app yet, you can download it from the App Store.
2. Join a meeting using one of these methods:
 - Tap Join a Meeting if you want to join without signing in.
 - Sign in to Zoom then tap Join.



Join

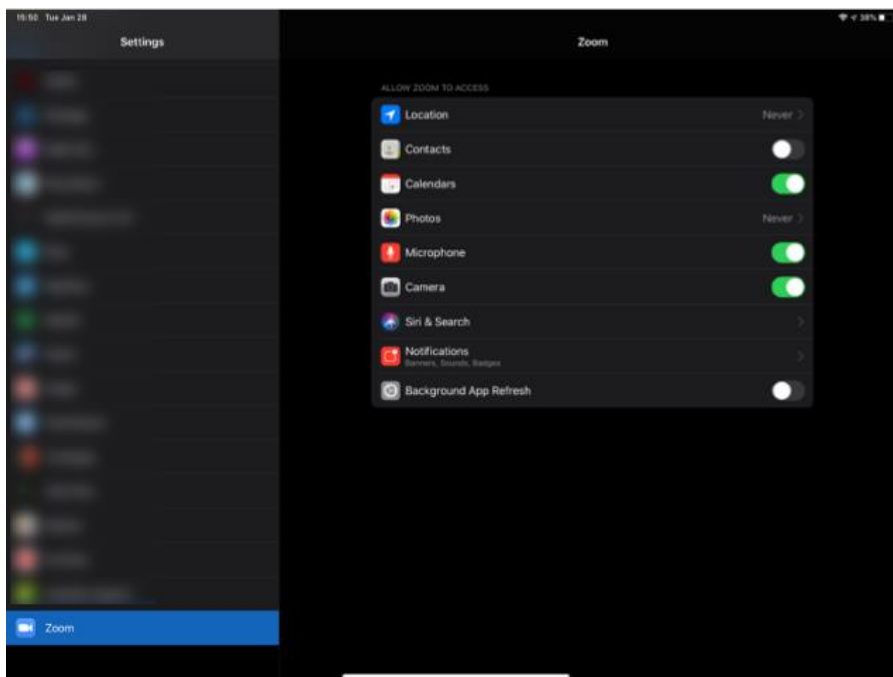
3. Enter the meeting ID number and your display name. <https://support.zoom.us/hc/en-us/articles/201362373-What-is-a-Meeting-ID->
 - If you're signed in, change your name if you don't want your default name to appear. Please use your full name so we can easily identify you in the waiting room.
 - If you're not signed in, enter a display name. <https://support.zoom.us/hc/en-us/articles/201363203>
4. Select if you would like to connect audio and/or video and select Join.



Permissions requested by Zoom for IOS devices

The Zoom Mobile Client may ask you to authorize access to the following permissions via a pop-up, depending on which features you are accessing in Zoom. You can enable these options beforehand or at your overall discretion by going to Settings > Zoom on your device. The following permissions are requested by Zoom:

- Location- Allows Zoom to access your location, so it can generate an Emergency Response Location, for when dialing emergency services from Zoom phone.
- Contacts - Utilized for Phone Contact Matching (not available for iPads or iPadOS).
- Calendars- Allows Zoom to add a meeting as an event in the Calendar app, when a Zoom meeting is scheduled.
- Photos- Allows Zoom the ability to access your local photo albums, for adding images to chat messages, or for screen sharing during a meeting or webinar.
- Microphone - Joining using built-in audio devices in a meeting or webinar.
- Camera - Sharing your video in a meeting or webinar.
- Siri & Search - Enables the ability to add Siri Shortcuts including Join the Next Meeting, View Today's Meetings, Start My Personal Meeting.
- Notifications- Allows Zoom the ability to display notifications for chat messages, upcoming meetings, and more.
- Background App Refresh- Allows for notifications for Meeting invites when the app is closed and not actively running.



Using Zoom on an IOS device (iphone/ipad)

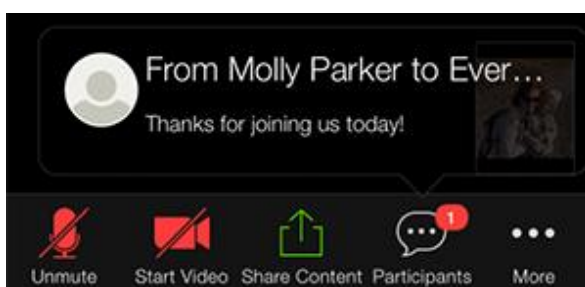
1. The attendee controls appear at the bottom of your screen, except for 'Leave meeting' which appears at the top-right corner.



2. Mute / Unmute: Mute or unmute your microphone.
3. Video: Start and stop your own video.
4. Share: Start a screen share. You'll be able to select what you want to share. [Learn more.](#)
5. Participants: See who's currently in the meeting. The participants list also gives you access to these options:
 - Tap your name if you want to rename yourself.
 - Chats: Chat with other participants. [Learn more.](#)
 - To access the chat, while in a meeting, tap the screen to make the controls appear.
 - Tap and click on the More/three dots at the bottom right of your screen and click chat. This will take you away from the main screen and here you can type a message to everyone. Hit 'close' on the top left corner to return to the main meeting screen.



- You can type your chat message and click Send, or if you want to change who it is being sent to, click the arrow next to Send to: and choose a different person or group of people.
- Incoming chats will be displayed at the bottom of your screen and you can click on Participants then Chat to view them.
- Invite: Invite others to join your meeting. [Learn more.](#)



6. More: View non-verbal feedback icons (if enabled by the host). Tapping an icon will notify the host by placing the icon beside your name in the participants list. For example, Raise Hand places the raise hand icon beside your name and simulates a hand raise.
7. On an iPhone, by default, the Zoom mobile app displays the active speaker view. If one or more participants joins the meeting, you will see a video thumbnail in the bottom-right corner.



8. Swipe left from the active speaker view to switch to gallery view.

9. You can view up to 4 participants' video at the same time. You can keep swiping left to view more participants' video.



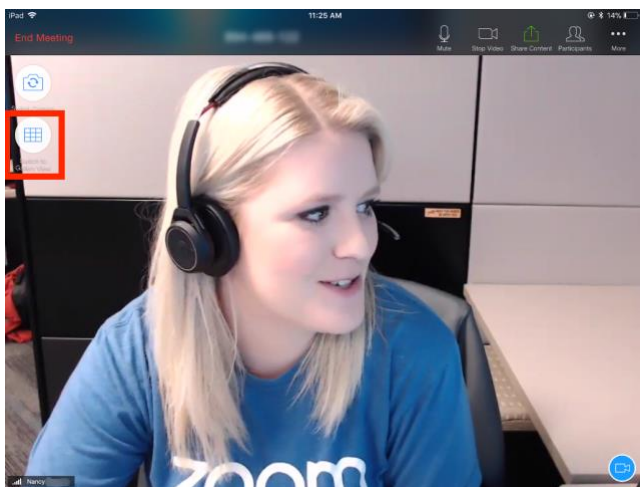
10. Swipe right to the first screen to switch back to active speaker view.



Using Zoom on ipads

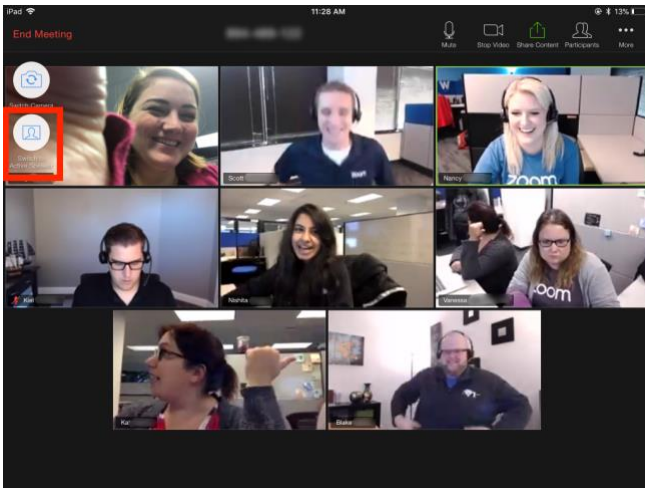
On ipads, Gallery View allows you to see up to 9 participants at once.

1. To switch from Active Speaker View, tap Switch to Gallery View in the upper-left corner of the Zoom window. If you do not see the controls, tap your screen to get them to appear.



This will switch into gallery view. You can view up to 9 people at a time.

2. To switch back to Active Speaker View, tap the screen to view the controls and tap Switch to Active Speaker in the top-left corner of the Zoom window.



Telephone-in

*Please note that you will still be able to participate if dialling in from a land-line but the experience will not be as engaging and as immersive as using a computer or tablet device.

1. On your phone, dial the teleconferencing number provided in your invite.
<http://zoom.us/zoomconference>
2. Enter the meeting ID number when prompted using your dialpad. Dial an in-country number. If you dial a toll number, your carrier rates will apply. You can find the numbers on your meeting invitation or view a full list of international dial-in numbers:
<https://zoom.us/zoomconference>
3. You will be prompted to enter the **meeting ID** - the nine (9), ten (10), or eleven (11) digit ID provided to you by the host, followed by #. <https://support.zoom.us/hc/en-us/articles/201362373-What-is-a-Meeting-ID->
4. If the meeting has not already started and join before host is not enabled, you will be prompted to enter the host key to start the meeting, or to press # to wait if you are a participant. <https://support.zoom.us/hc/en-us/articles/202828525-Join-Before-Host> <https://support.zoom.us/hc/en-us/articles/205172555-Host-Key>
5. You will be prompted to enter your unique participant ID. This only applies if you have joined on the computer or mobile device or are a panelist in a webinar. Press # to skip.
6. You may be prompted to enter the meeting passcode, followed by #. This passcode will be included in the meeting invite provided by the host.

Note: If you join by computer or mobile device later, you can enter the Participant ID to bind your phone and device session together and show your video when you speak on the phone. To enter your participant ID once you are in the meeting, enter #Participant ID# on your phone.

Phone controls for participants

The following commands can be entered via DTMF tones using your phone's dial pad while in a Zoom meeting:

- *6 - Toggle mute/unmute
- *9 - Raise hand

Entering the meeting password using your dial pad

If the meeting requires a password, a phone-specific numeric password will be generated. You can find this password in the invitation listed below the dial-in numbers and meeting ID.

Joining Zoom from a web browser

Google Chrome

1. Open Chrome.
2. Go to <https://join.zoom.us/>
3. Enter your meeting ID provided by the host/organizer.
<https://support.zoom.us/hc/en-us/articles/201362373-What-is-a-Meeting-ID->

Join a Meeting

Meeting ID or Personal Link Name

Your meeting ID is a 9, 10, or 11-digit number

Join

[Join a meeting from an H.323/SIP room system](#)

4. Click Join.
 - If this is your first time joining from Google Chrome, you will be asked to open the Zoom client to join the meeting.
 - You can check Always open these types of links in the associated app to skip this step in the future.
 - Click Open Zoom Meetings (PC) or Open zoom.us (Mac).

Open Zoom?

<https://zoom.us> wants to open this application.

Open Zoom

Cancel

Safari

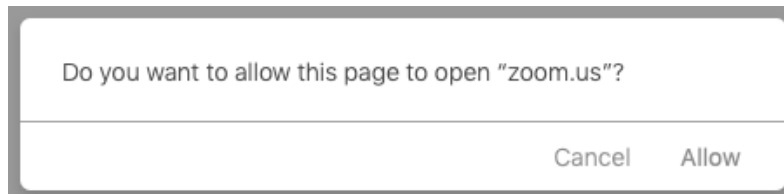
1. Open Safari.
2. Go to <https://join.zoom.us/>
3. Enter your meeting ID provided by the host/organizer.
<https://support.zoom.us/hc/en-us/articles/201362373-What-is-a-Meeting-ID->

Join a Meeting

Your meeting ID is a 9, 10, or 11-digit number

[Join a meeting from an H.323/SIP room system](#)

4. Click Join.
5. When asked if you want to open zoom.us, click Allow.



Microsoft Edge or Internet Explorer

1. Open Edge or Internet Explorer.
2. Go to <https://join.zoom.us/>
3. Enter your meeting ID provided by the host/organizer.
<https://support.zoom.us/hc/en-us/articles/201362373-What-is-a-Meeting-ID->

Join a Meeting

Meeting ID or Personal Link Name

Your meeting ID is a 9, 10, or 11-digit number

Join

[Join a meeting from an H.323/SIP room system](#)

4. Click Join.

Mozilla Firefox

1. Open Firefox.
2. Go to <https://join.zoom.us/>
3. Enter your meeting ID provided by the host/organizer.
<https://support.zoom.us/hc/en-us/articles/201362373-What-is-a-Meeting-ID->

Join a Meeting

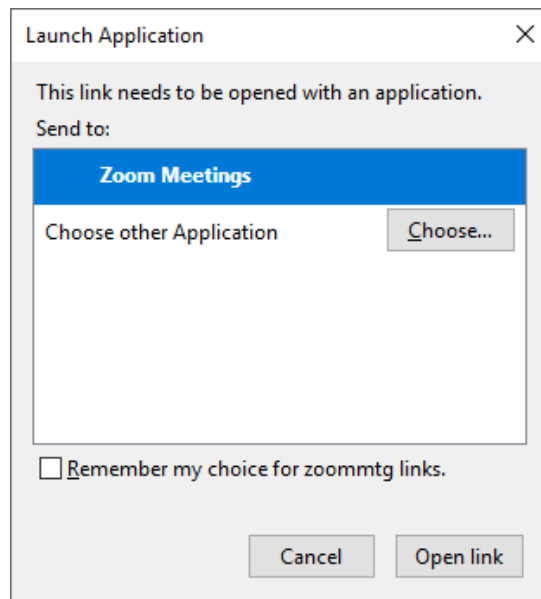
Meeting ID or Personal Link Name

Your meeting ID is a 9, 10, or 11-digit number

Join

[Join a meeting from an H.323/SIP room system](#)

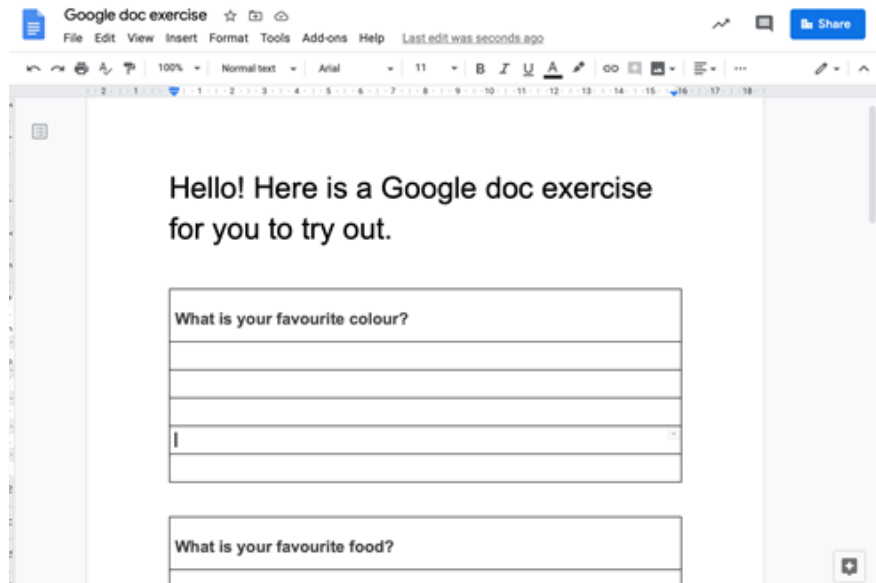
4. Click Join.
 - If this is your first time joining from Firefox, you may be asked to open Zoom or the Zoom installer package.
 - To skip this step in the future, check Remember my choose for zoommtg links.
 - Click Open Link.



Following links & setting up Google Docs

Please note that if you can't get into any of the tools during the [add in what it is i.e workshop or event] such as Google Docs, or you are uncomfortable using it, there will also be a facilitator in your break-out room small discussions to capture your views and screen-share the Google doc with you. However, the option is there to use it and to familiarise yourself with Google docs and test on the device you are on- please feel free to click into this Google doc. You can click into or copy and paste this Google Doc link into your chosen web browser here and try out the exercise:

https://docs.google.com/document/d/1GO0F9bT8xQQ03RfA41sz466vqTVomwu_-8KifN7sWCA/edit#heading=h.reiqolp0c5dd



There may be others who are in the doc at the same time or who have completed the exercise.

Google docs are commonly used for writing purposes and they're a great way to create and edit text documents right in your web browser—no special software is required. Even better, multiple people can work at the same time, you can see people's changes as they make them, and every change is saved automatically.

You should receive a Google Doc link either in the Zoom chat or by email. To access this you can click into the link, which should automatically take you to the link in a web browser or your Google Docs app OR you can access the Google Doc by copying the link and pasting into your chosen web browser.

The Google Docs app simplifies the editing process for phones or tablets. Using the app, you can create and open documents and view and edit recent files on a phone or tablet. Download the free app from the App Store.

Android phone or tablet

Download the Google Docs app

1. On your Android phone or tablet, open the Google Play app



2. Find the Google Docs app  For more info:

<https://play.google.com/store/apps/details?id=com.google.android.apps.docs.editors.docs>


https://www.google.com/docs/uc?referrer=utm_source%3Ddocs_hc%26utm_medium%3Dlink%26utm_campaign%3Ddocs_hc

3. Tap Install.

iPhone & iPads

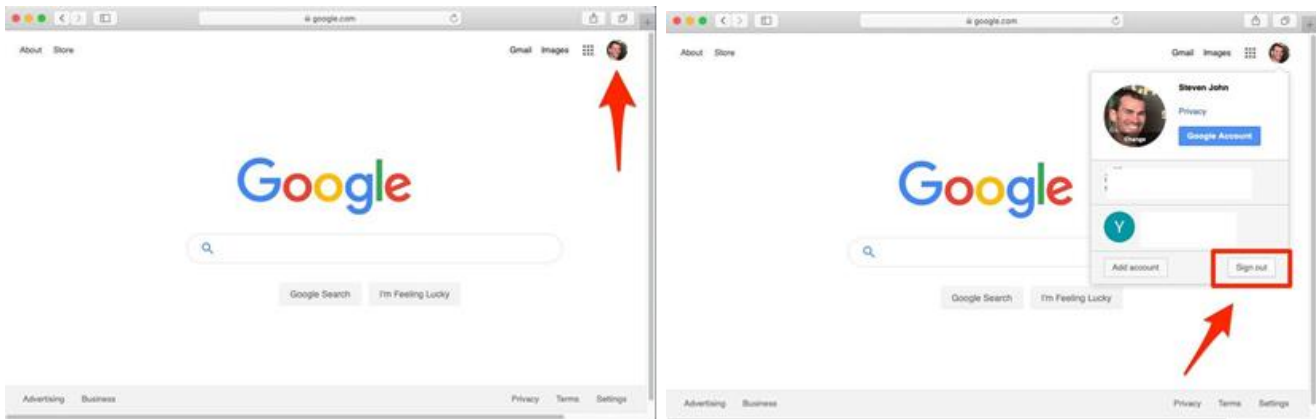
You can create, view, and edit Google documents, as well as Microsoft Word® files, with the Google Docs app for iPhone and iPad. <https://itunes.apple.com/us/app/google-docs/id842842640>

Download the Google Docs app

1. On your iPhone or iPad, open the App Store.
2. Find the Google Docs app.  https://itunes.apple.com/app/apple-store/id842842640?pt=9008&ct=docs_hc&mt=8
3. Install the app.

Privacy & editing settings

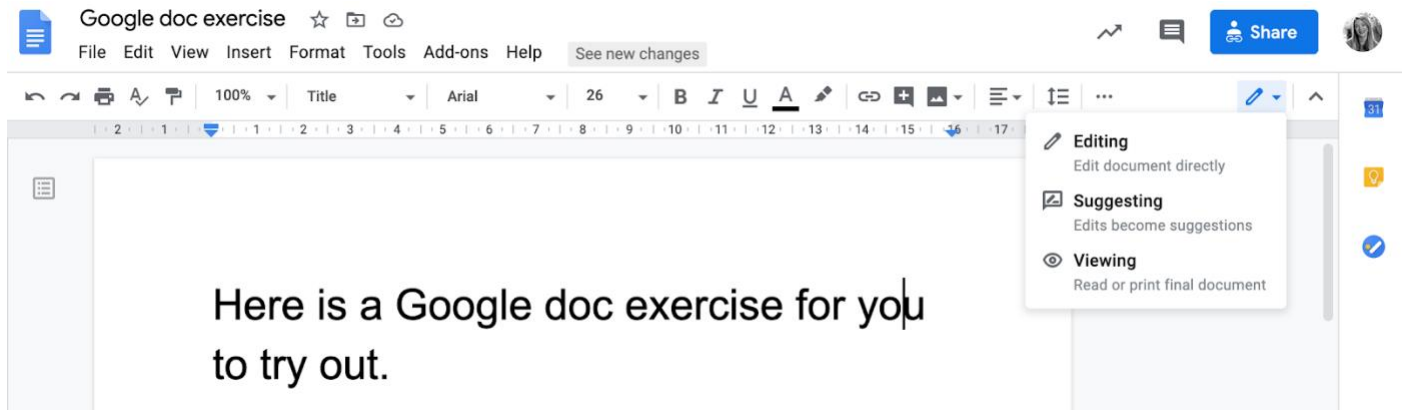
If you have a google account (for example from using Youtube, or Gmail) you may want to sign out of this first, so that your edits stay anonymous. You can do this by clicking on the circle with your initials in, towards the top right of the screen. You do not need to sign up, this is a publicly open accessible document so anyone with the link can access and edit.





You should be able to appear as “anonymous racoon” or “anonymous badger” etc at the top right-hand corner of the doc. You do not need to sign up to use any of the Google docs that we will use in the online assembly sessions.

The docs shared with you should be open access and editable for anyone coming onto them and should be able to click on the document and type. However, you can change the settings

here by clicking on the pen icon on the top right where there is editing, suggesting and viewing and click editing. This should mean you can type freely.



To edit a document

1. On your computer, open a document in. <https://docs.google.com/document/u/0/>
2. To select a word, double-click it or use your cursor to select the text you want to change.
3. Start editing.
4. To undo or redo an action, at the top, click Undo  or Redo 
5. To edit a document on a touchscreen device, like a Pixel Book/ipad/tablet, double-tap the document to start typing.
6. You can add and edit text, paragraphs, spacing, and more in a document.
7. Format paragraphs or font: <https://support.google.com/docs/answer/1663349>
8. Add a title, heading, or table of contents:
<https://support.google.com/docs/answer/116338>

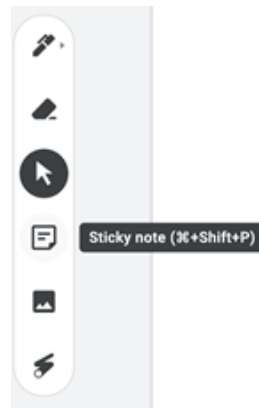
Google Jamboard

Please note that if you can't get into any of the tools during the [add in the workshop or event] such as Google Jamboard, or you are uncomfortable using it, there will also be a facilitator in your break-out room small discussions to capture your views and screen-share the Jamboard with you. However, the option is there to use it and to familiarise yourself with the Jamboard and test on the device you are on please feel free to click into this

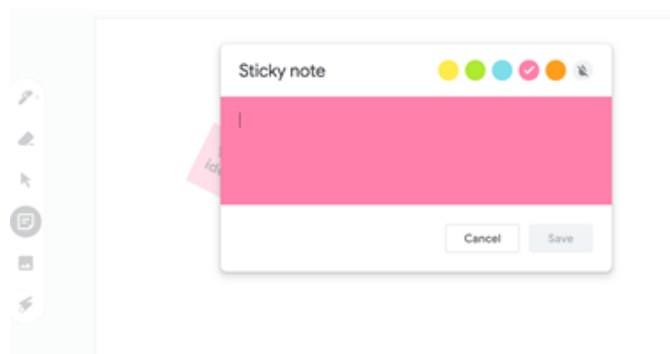
Jamboard link: https://jamboard.google.com/d/1P-SYeVE9qks_FtIkEhDzMC77yfmESksmUY21JbKuXEI/viewer?f=0 to answer the question we have asked and get familiar with the tool.

Google Jamboard is a virtual interactive whiteboard that can be used collaboratively to mind map and share ideas. More information about Jamboard is available here: <https://support.google.com/jamboard/answer/7424836?hl=en>

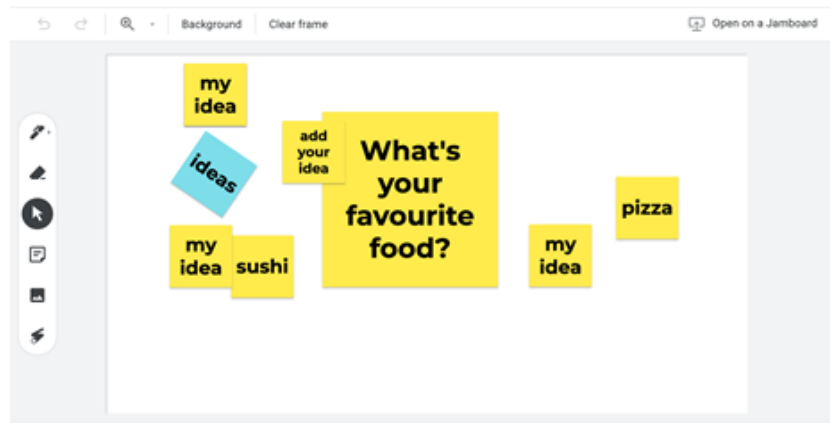
You can add 'sticky-notes' or ideas by clicking on the left-hand side on the tools panel and a sticky note will appear like this.



You just need to type in your idea and click save. You can also change the colour at the top of the note or size of the sticky-note by stretching the corners once you have saved it. To get out of the sticky-note, just click cancel, then you can move your note around on the board.



You do not need to sign up, similarly with google docs, this is a publicly open accessible tool so anyone with the link can access and edit. You won't need to sign up to use any of the Jamboards that we will use in the online **[add in what it is i.e event or workshop]**.



Facilitators may send you a link to a Jamboard in the Zoom chat function in your session or in advance if it is required.

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A guide to security, verification & GDPR

Security, verification & GDPR in digital PB

Webinar: <https://www.youtube.com/watch?v=7M4HXTPINuI&feature=youtu.be>

What is verification?

The process of establishing the truth, accuracy, or validity of something.
"The verification of official documents"

What is security?

Digital Security refers to various ways of protecting computer's internet account and files from intrusion by an outside user.
"Protection of online identity"

Security and verification in a Participatory Budgeting process

There are a number of key tenants that are needed as part of ensuring a democratic process can be trusted by those who take part:

- The results should not be open to outside influence from those who should not be part of the process;
- The data captured and results that emerge is a correct representation of what was heard,
- The data captured is kept private and not easily able to be captured by external actors

Developing appropriate security, data protection, and verification processes are the ways by which you try to ensure this takes place - regardless of whether this takes place using digital approaches, non-digital approaches, or a mix for your democratic process.

While all democratic processes should be protected in this way, exactly how this is handled is likely to follow a risk based approach. For instance, democratic activities around contentious issues are more at risk from individuals or organisations trying to either disrupt a process, or influence the outcomes - while in respect to Participatory Budgeting, activities involving sizeable budgets are more likely to attract attention and attempts to subvert the activity.

However, when using digital approaches, it becomes even more important to think about these issues.

If you want to change the result of an offline PB budgeting voting process - for instance - you would have to find a number of individuals who were going to take part, and convince or coerce them into voting for the project you want to, or deliberately convince a large number of people to attend an activity in order to vote for your preferred project. Now this isn't impossible and might be something people try to do in certain contexts - but can be relatively challenging.

However, online - if all an individual is required to do is to sign up with an email address to create an account to vote for a project, then one individual could create a number of email addresses and use each of these to vote. It's much more easy to influence the result in that way.

Verification and Identification in an online process

When we talk about verification, this is about how to ensure the 'right' people are getting the chance to take part - the definition of which is created by the organisation running the PB process. This could be 'all members' of a membership organisation, all those who live in a local area, or are part of the same housing association- the criteria of 'who' to be set by the process organisers.

There are a number of ways this can be done.

- Process for general elections
- Many municipalities and otherwise across Europe use ID cards - but we don't have a national identity card scheme in the UK. Obviously have YoungScot card and National Entitlement Card which provides multiple purposes (Bus pass; Library card; Leisure membership card; Young Scot card) but only works for a subset of the population
- Some membership organisations have membership numbers

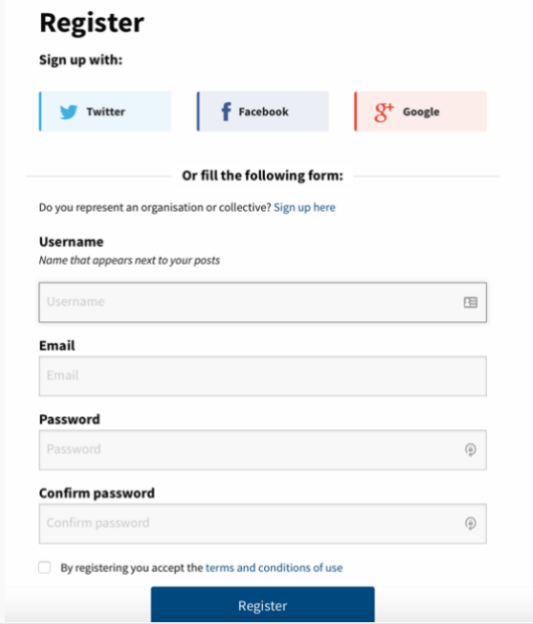
Against the need to verify who is part of an online process, you are faced with the tension that if you make verification too onerous, you reduce the number of people likely to take part. Few people are likely to sit and fill in a long registration form, or maybe put off by hunting for a registration number on a document they don't easily have to hand.


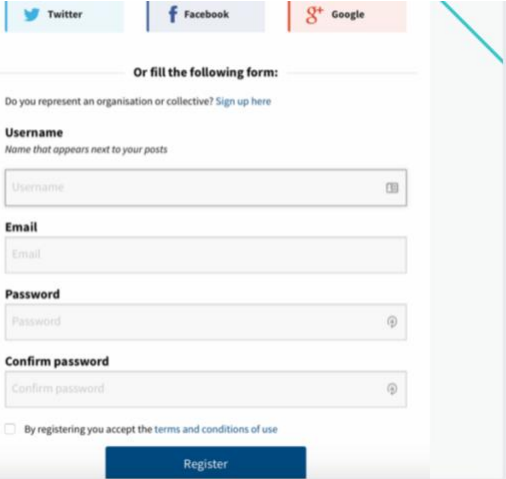
You also have to think carefully about who might/might not have access to verification data.

If one of your purposes in carrying out a PB exercise is to help hear from under-represented groups, recognising that these individuals are less likely to have easy access to forms of verification is important.

Why do we need verification?

Data for Verification	Pros	Cons
Email verification	Most people have an email address of some sort - it's not asking for a lot of personal information.	Not everyone has an email (i.e school children), have to go through your email to verify-takes time.

		<p>Not very secure - anyone can create an email account and register it, so relatively easy to hack and influence the outcome. Can be more secure if you are an organisation which (for whatever reason) gives people an email address (e.g. all participants use a @nhs.net email address).</p>
		
<p>Social media (facebook, twitter account)</p>	<p>Often quick for many people.</p> <p>Individuals don't have to have an email address - although in most instances, you'll need an email account to have signed up for this social media account.</p>	<p>Requires people participating on another platform.</p> <p>Some ethical concerns - i.e young people can be found easily, are you encouraging people to sign up to a social media platform?</p> <p>Cannot necessarily then ensure a participants identity is private.</p> <p>Could potentially lead to data being shared, or perceptions that it might be shared.</p>

		
<p>Postcodes</p> <p>(Musselburgh example- correct postcodes- test phase important)</p>	<p>Easy to verify.</p> <p>Everyone living in a geographic area has one</p> <p>Great approach if your PB process has been designed to have separate regional activities.</p>	<p>Only really works if you are looking at a project where you know the geographic region in which people are going to vote.</p> <p>Doesn't easily account for people who work and play in an area, rather than just live there.</p> <p>Easily forged - can easily use a search engine to find a postcode in a region.</p> <p>May not take into consideration homes of multiple occupancy - could lead to individuals being disenfranchised (or indeed disenfranchised by those who are faking living in the area)</p>

POSTCODES

Identity Type
Postcode

Identity Number
EH30 870

Birth Date
[Dropdown] [Dropdown] [Dropdown]

Roles
 Resident
 Student
 Worker
 Optional

<p>Council Tax Number</p>	<p>Easily verifiable and harder to fake than a postcode;</p> <p>Individual to each household;</p> <p>links PB process directly to tax</p>	<p>May not take into consideration homes of multiple occupancy,</p> <p>Would not take into account children and young people.</p> <p>Finding council tax number may be hard for individuals</p> <p>Not relevant for organisations which are carrying out PB programmes, but don't have access to council tax numbers for verification purposes.</p>
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COUNCIL TAX NUMBER

Identity Type
 Identity Type
 Postcode
 Council Tax Number
 Young Scot Card
 Class

Birth Date
[Dropdown] [Dropdown] [Dropdown]



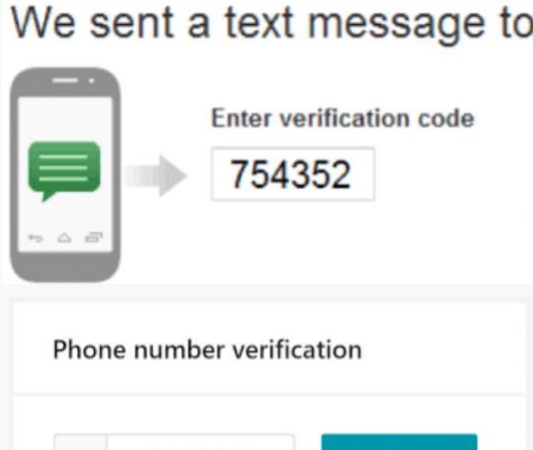

Roles
 Resident
 Student
 Worker
 Optional

[Previous](#) [Next](#)

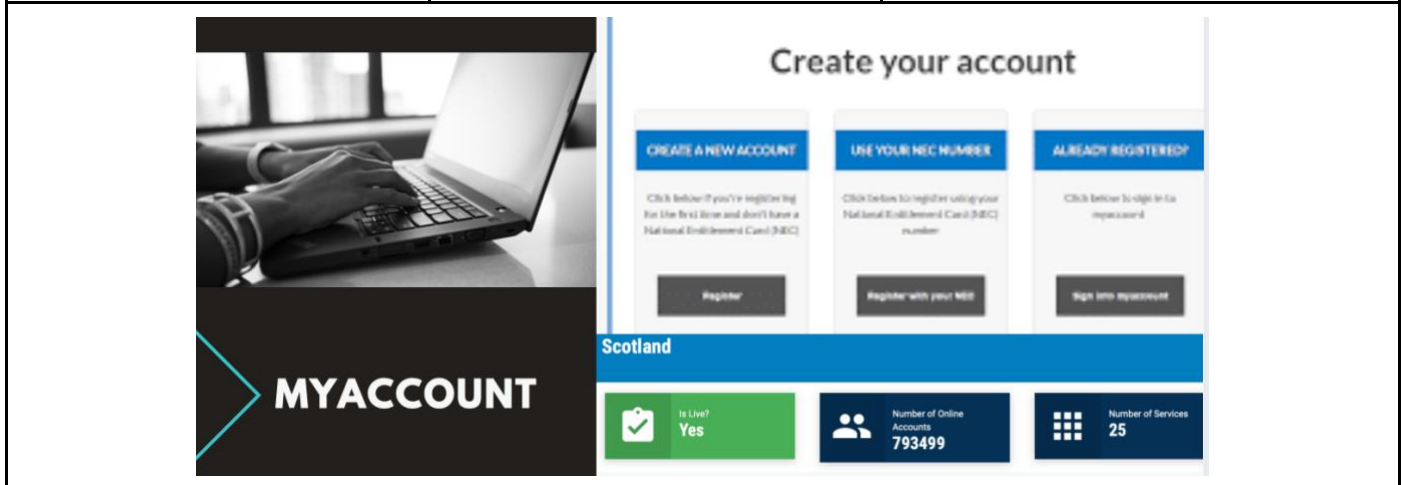
<p>Identification Card</p>	<p>Spain: ID cards hold details the name and surnames of the holder, date of birth, address, parents, sex, residential address, city and province of birth, and contains a photograph</p> <p>Iceland: ID card for age 14 and above</p>	<p>Not everyone will have an ID card (people lose them) this might require extra work including using personalised codes</p> <p>Iceland: only verifies those 14 and above, you need a passport or driving license to apply - so clearly excludes some communities</p> <p>Don't have ID cards in the UK</p>
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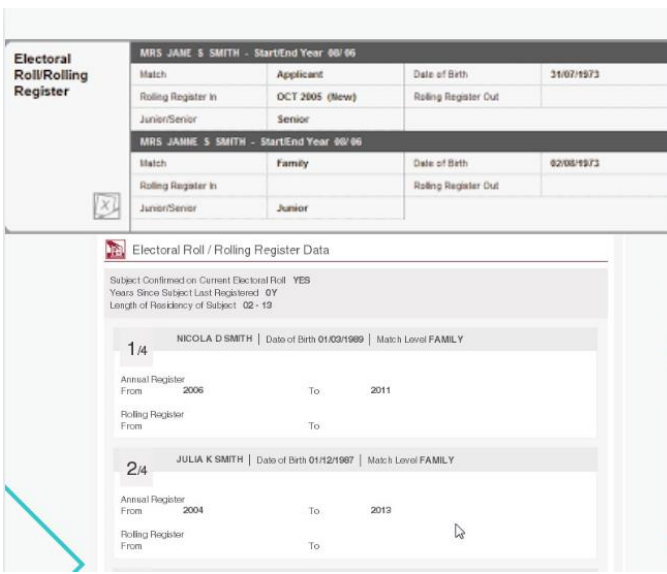
<p>YoungScot Card</p>	<p>Easily accessible and verifiable,</p> <p>Encourages young people to participate,</p> <p>Promotes youngscot card,</p>	<p>Only verifies those aged 11-26; not all young people have a young scot card</p> <p>Without a secure database-organisations such as communities might not have access to YoungScot card numbers to verify identification</p>
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<p>Identification</p> <p>Identity Type</p> <ul style="list-style-type: none"> ✓ Identity Type Postcode Council Tax Number Young Scot Card Class 		<p>YOUNG SCOT CARD</p>
<p>SMS Text Voting Verification</p>	<p>High level of mobile phone proliferation; provides contact details for further verification</p>	<p>Possible to cheat by using multiple SIM cards; additional cost to implement</p>
		<p>SMS TEXT VOTING VERIFICATION</p>
<p>MyAccount</p>	<p>Already in use in Local Authorities across Scotland; SAMH2 technology enables authentication process to be integrated with digital tools; encourages use of myaccount to access council services</p> <p>Using myaccount</p>	<p>additional cost to implement; no guarantee mygov.scot will allow for authentication to be integrated; low proliferation rate</p> <p>Without a secure database to store information not every community can use this verification method</p>


Begin by registering for an online account. This provides you with a username and password. You only need to complete this registration process once. From then on you can use your username and password to access a range of online public services such as paying a council tax bill or requesting a car parking permit.



<p>Electoral Roll Data</p>	<p>Trusted, verified database linked to individuals; encourages people to register to vote for elections (as well as potential PB)</p>	<p>Clarity required if this data is accessible to local authorities to verify;</p> <p>Not everyone is on the electoral roll - including many young people, students, people who move house often. Also, excludes those who are younger.</p>
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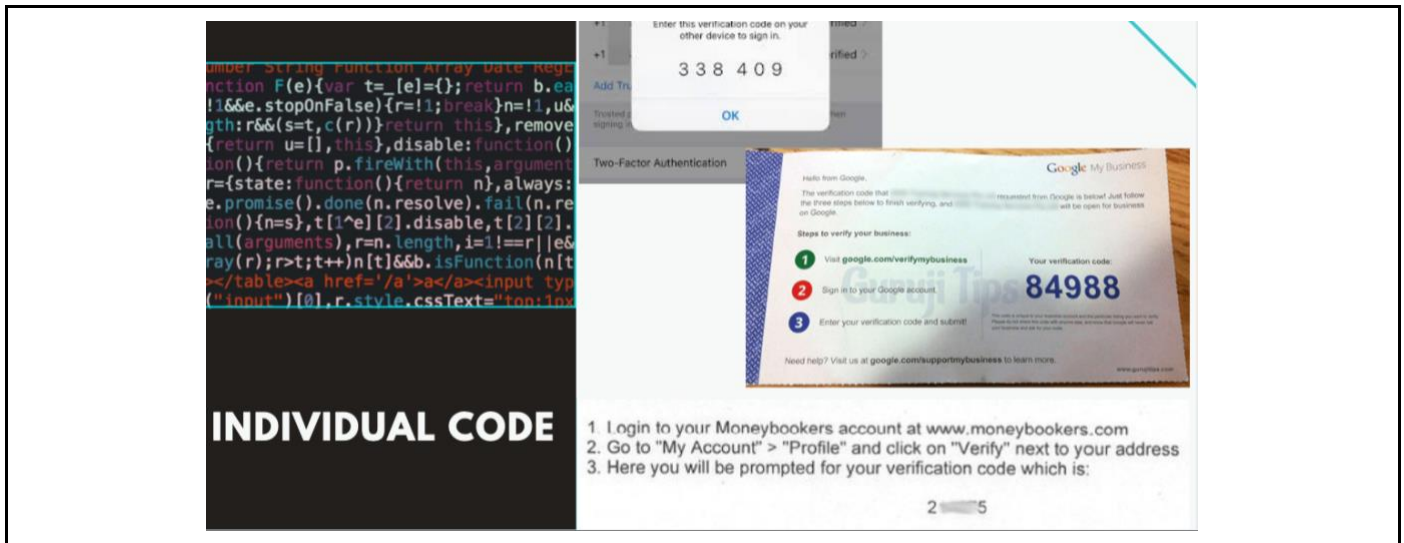


The screenshot shows a web interface for 'Electoral Roll/Rolling Register'. It displays two entries for 'MRS JAMIE S SMITH - Start/End Year 00/06'. The first entry is for an 'Applicant' with a date of birth of 31/07/1973, registered in OCT 2005. The second entry is for a 'Family' with a date of birth of 02/08/1973, registered in JUN 2005. Below this, there is a section titled 'Electoral Roll / Rolling Register Data' with summary statistics: 'Subject Confirmed on Current Electoral Roll YES', 'Years Since Subject Last Registered 0Y', and 'Length of Residency of Subject 02 - 13'. Two individual entries are shown: '1.4 NICOLA D SMITH | Date of Birth 01/02/1989 | Match Level FAMILY' with registration from 2006 to 2011, and '2.4 JULIA K SMITH | Date of Birth 01/12/1987 | Match Level FAMILY' with registration from 2004 to 2012.



**ELECTORAL
ROLL DATA**

<p>National Insurance data</p>	<p>Trusted, verified database linked to individuals; high proliferation rate</p>	<p>Clarity required if this data is accessible to local authorities to verify</p> <p>Excludes those who are under 16.</p>
<p>Individual Code (individual link) - An individual code could be sent to every household in the area for them to use to register to participate in PB exercise</p>	<p>Ensures one person, one vote – as name of participant and code entered on registration must match to be verified; could encourage high turn out if every applicable resident receives a ballot</p>	<p>Clarity required if local authorities have capacity and available data to verify using this method; additional cost to implement;</p>



Beyond these approaches, most software tools have algorithms in place to help identify if registration or voting patterns are suspicious - for instance if too many votes come from one internet network connection, it can flag something up for the team to look at. The reason for flagging it up in this way, rather than automatically excluding it is that there are often locations like universities or libraries where multiple people might be trying to vote. What they'll look for then are suspicious patterns of voting e.g. too many individuals voting for the same project in a short time frame, or trying to register in a short time frame with insufficient variance between the profiles.

As touched on earlier - you might want to take a risk-based approach to sorting through verification. For instance, different levels of verification methods for discussion of early ideas and actual decision-making. An example where this taken place is in Reykjavik in Iceland, where early idea generation is carried out using email and password as a means of verification, while voting takes places using a national ID number.

Participare developer recommendation

- One of the key things Participare developer (digital participatory budgeting tool developed in Portugal) recommends is that you 'test' any piece of software you use for attempted fraud before you use it up to 2 weeks in advance of starting your digital process - asking trusted staff or citizens to register and vote on the system and attempt to vote multiple times and check the flagging works properly.
- If you are running an online vote and offline vote (i.e you have an event where people can vote on the day) you can upload paper ballot votes via CSV file or register in

person voters as they come in via the exact same identity type as online. You can set in person voting on the system so that when people vote in person and online platform will flag up anything dodgy.

- One of the interesting things to note is that we don't talk about offline fraud so much. While it can be more difficult to achieve, it's certainly a possibility to pressure people to vote in a certain way in person. See our voting webinar for more information.



Security and reliability of the software and process

Making sure the digital software and data captured through the PB process cannot be accessed is important - both for ensuring people don't gain access to the software itself and edit any results (linking to the conversation we just had on verification, and ensuring the results are accurate), and ensuring the data - which can include personal data like names and emails, is not accidentally leaked to the wrong people.

There are existing security standards that can indicate the robustness of a piece of software, and show commitments made to strong data management processes. A common one to see in this space is ISO/IEC 27001.

However, one thing to remember is that digital engagement platforms are often an emerging space/field, and those who are still developing and improving their platform on a regular basis may not have chosen to achieve this optional certification. Not having gone for it doesn't mean robust processes are not being followed - and what you'll want to do is run through a number of questions.

It's also really important to remember that security isn't just a function of the software. You can use the most secure software out there, but if the human security around the design of the process is flawed, then you risk compromising the overall security of the process.



Questions for you to think about when thinking about digital engagement platforms

Who owns the data being generated through the process?

If you are using a tool that you are not hosting yourself, you should ensure you have an agreement in place stating you have full ownership of the data. This means that you can ensure how the data being collected, processed and handled will be subject to your data policy standards - and means you are not at risk of a company being bought out, and their data being sold. You should also ensure you are able to access a copy of the data in a common format after the engagement activity has taken place (e.g. in .csv or .xlsx file).

Where is the data stored?

The physical location of servers is also really important - as data stored in different geographic areas will be bound by the laws in those areas. If you are hosting the software for digital engagement yourself, you will likely already have servers set up that are based in suitable countries.

If you are using software that is stored on the servers of the software provider, it's really important to ask where these are based. If you are running a PB process based within Scotland, the UK or the EU, in order to comply with GDPR legislation, you must make sure these are based either within the [European Economic Area](https://ec.europa.eu/info/law/law-topic/data-protection/international-dimension-data-protection/adequacy-decisions_en) or covered by what is termed an 'adequacy decision'. You can check what countries are covered by an adequacy decision by checking the European Commission's website: https://ec.europa.eu/info/law/law-topic/data-protection/international-dimension-data-protection/adequacy-decisions_en

Some software you're exploring will be hosted on your server, other software will be stored on the servers of the software provider. You'll want to make sure that this data is stored either within the EU, or behind a privacy shield.

How is data transferred?

If the data is held on the servers of software providers, you'll also want to ask about how data is transferred. Is it encrypted?

Who has access to the data?

There are multiple sides to this. Firstly - when designing your PB process and setting up the software, think about who from your organisation has access to the full set of data, and whether this could be restricted, for instance through setting up different access levels to the back end - only one or two people, for instance having full admin access, while others having access to moderation options.

Perhaps also think about what types of security settings you could put in place to reduce someone accessing the data using the login details of people from your organisation - especially those with higher levels of access.

Do you ensure that all your team use [strong passwords](#) (e.g. 8 characters or more, a mix of capital letters, lower case letters, numbers and symbols, and not something people could easily identify relating to you)? Have you thought about introducing [two factor authentication](#)?

You also need to think about what access the software provider has to the data. Can they potentially access the raw data? If so, you might want to access what security processes they have put in place to ensure this isn't abused. Some companies, for instance, may background check all employees. Other systems - such as those used in Reykjavik, do not have access to the raw data about how someone voted.

Finally, you'll need to think about the physical security of the servers themselves. Are the premises on which the servers are based themselves secure, with access restricted?

From a comms perspective, you'll also want to think about how some of this information is clearly communicated to participants upfront - to help them understand more about what is going on, and how.

Reliability & vulnerabilities

You also need to be sure that the software and servers will be available the majority of the time, for instance if a lot of people suddenly try to use a site and it does not crash. You can seek contractual uptime and performance guarantees. What happens if lots of people trying to use it, e.g. consulting a large population on contentious issue. You might also want to know how frequently they are backing up your data, and quickly they could restore your data from a loss.

How have the software developers tested their services for automated or opportunistic attack? This is often called 'penetration testing' or 'pen testing' - and in the UK it is often recommended that people look for platforms that have been approved as part of the CHECK system. Again, not being CHECK tested doesn't mean this hasn't taken place - but you should ask about it, and ensure your IT teams are happy with the answers.

