**2020 Online KT Conference:**

**Social Media Strategies for Knowledge Translation**

*How to Utilize Crowdsourcing and Social Media Tools to Engage Stakeholders*

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>> ANN OUTLAW: Our first presentation is from Hope Adler and Katia Albanese.

>> KATIA ALBANESE: Okay. So, thank you for that. This is Katia and Hope and I will kick things off presenting together for today's presentation. So, thank you, again to AIR’s center on Knowledge Translation for Disability and Rehabilitation Research for having us. We are so excited to be able to present to you and share with you some of our knowledge and expertise around communication and utilizing crowd sourcing and social media tools to engage stakeholders.

As Ann mentioned, Hope and I are with Concepts Inc. We are a small women‑owned business and head quartered in Bethesda, Maryland. We specialize in education and outreach initiatives. We have a specific niche in disability employment. We work with federal government agencies, grantees, state governments, advocacy and employer organizations all in an effort to increase the inclusion of people with disabilities including disabled veterans in the workplace and community. We do this by working with these organizations to turn knowledge into action and to create messages that promote positive change.

As Ann mentioned in our bio is policy work. That is an initiative spearheaded by the US Department of Labor Office of Disability Employment Policy. We’re going to use these policy work examples today of how the federal government have utilize crowd sourcing social media tools in order to engage stakeholders.

It's to inform policy making around disability employment issues, but it's easily translatable to research as well. So, we are going to take you through our process of how we host these dialogues, how we integrate other social media tools as well to our crowd sourcing platform and to share with you examples, the specific examples of some of the dialogue we posted. Some of the outcome and engagement strategies and some of the actions that resulted from it as well as best practices and lessons learned that hopefully you can utilize in your knowledge to action framework.

So, just backing up really quickly about e-policy work, it's an initiative that’s been utilizing crowd sourcing since 2013. We use a platform called IdeaScale. I’m sure you’ve heard of others, Bright Ideas. There are lots of platforms on the market. For our initiative, we have hosted more than 40 unique events ranging on topics from accessible transportation to customized integrative employment opportunities to work‑based opportunities and Covid‑19 related activities. Hope is going to share with you a couple of examples of a little more detail how we engage with our stakeholders and get input on these policy issues. All of these campaigns are available to the public. Crowd sourcing is engaging a larger audience to help them form the effort that you are spearheading. With that, I'm going to go ahead and play a little video for to you help you really better understand our policy initiatives and then, take it from there. Ann, if you don't mind.

[video plays]

>> KATIA ALBANESE: All right. Thank you. Before we move into our polls and we are going to quickly explain crowd sourcing. I'm sure for most of you are probably aware of what crowd sourcing is. I just touched upon it briefly before. But, it was coined in 2006, by a journalist named Jeff Howe. It was a practice of soliciting ideas from stakeholders to help solve problems and make decisions. It's evolved over the last decade to look to seek knowledge and not just knowledge, but also input on goods and services and really to help organizations make decisions making that through really focused messaging to their key stakeholders.

And they collect this information through social media, smart phone apps and crowd sourcing tools. It's used for all kinds of tasks from anything like restaurants trying to find out what specials to run the following weekend, what the customers liked the most to genetic researchers asking to help in sequencing the human genome, lots of variety there. Why do we use crowd sourcing and why is it so effective? There’s a variety of reasons.

One is its lower cost. It's instant information gathering, quick information gathering, finding people where they are at that moment. You can do that online and at low cost. There is more diversity. You can reach a greater audience for us. They are important for the Office of Disability Employment Policy to be able to reach everyone and provide an accessible platform where all individuals can participate.

So previous, when things were done more with in person listening sessions, that was difficult for many people to get to. Just logistically. Now, and I think everyone can respect this even in the current environment with Covid‑19, the real need to be able to collect information and share and be able to access platforms online and provide input that way.

Then of course, for crowd sourcing, it's a great way for marketing, for just getting information out and awareness building. So with that, if we could just start the first poll. We just wanted to find out a little more about our audience and what social media platforms that you use to lead your stakeholders. The question on the slide is which of the following, and you can check all that apply, social media platforms do you use to engage your stakeholders? Twitter, Facebook, Instagram, YouTube, LinkedIn and other? We want to know if you are using them professionally and with your stakeholder and which of these you are using.

Give you a few more seconds to respond. Once the poll closes we will read the responses and ‑‑ sure. I think there is a question here in the chat. Which of the following social media platforms do you use to engage with your stakeholders? And please check all that apply. We do know people are using more than one platform. It's important to reach your platform through as many platforms and channel, where they are. So Twitter, Facebook, Instagram, YouTube, LinkedIn and other.

The results show that 69% use Twitter followed by 62% Facebook. 28% Instagram, 31% YouTube, 43% LinkedIn and other 12%. I want to note here Twitter 69% stakeholders think for work LinkedIn is usually the business platforms the social media platform. The reality is most people are communicating through Twitter. So with that, if we go through the next set of questions which will be two questions on the poll. The first is have you ever participated in a virtual crowd sourcing event? This was a simple yes, no, or not sure.

The second question is have you ever used a crowd sourcing platform to gather input from stakeholders? Yes or no or I'm not sure. Again, we are talking about crowd sourcing in participating in crowd sourcing event they run the gamut from the platform we use as I mentioned before, IdeaScale and others like Bright Ideas and some others you might be familiar with, Idea Bounty, Child Spring.

Organizations are using crowd sourcing events for all different activities, internal crowd sourcing to gather information and organization about just employee practices and HR often does this to get ideas about how to improve the workplace for their employees.

>> HOPE ADLER: Sorry, this is Hope jumping in. Somebody is asking what platform we use. Katia mentioned we use IdeaScale. One of the reasons that we choose to go with IdeaScale was because they were willing to work with us not only to ensure that it was 508 compliant and accessible, but to make sure it was usable for the community that we work with. And they were very willing to work with us, which was amazing. And there was also a question about security. We will touch on that a little bit as we talk about the different dialogues that we have done. Security is important. But we do not collect any personal identifying information and we do verify all e‑mails for those who participate.

>> KATIA ALBANESE: Thank you. Just real quickly, 64% of the participants said no, they have not participated in virtual crowd sourcing event. 18% said yes and 18% said not sure.

Crowd sourcing is the way we use it is different from other organizations. We use it to inform policy making efforts and have a pretty robust process in place. But if you have ever responded through Yelp or ever posted a review, you are participating in a crowd sourcing event. It's just at a much simpler scale but it's the same basic concept. Gathering stakeholder input in order to inform an effort.

Have you ever used a crowd sourcing platform to gather input from stakeholders? 76% said no. 7% said yes, and I'm not sure is 17%. That is why we are here today so you can use the same process in gathering stakeholder input because it's becoming much more of the norm. As I mentioned before, there are lots of benefits in doing so and lot of platforms available free and otherwise. So, with that, let's move on with the presentation.

In the next slide is the knowledge to action frame work which I'm sure most of you are familiar with. I'm not going to spend too much time on the framework, but we just wanted to mention that we utilize it as part of our dialogue process, but also our dialogues are part of the knowledge to action framework for our home division. We mentioned that ODEP hosted a dialogue, but most are done in conjunction with another organization one or other federal agencies or advocacy groups or state organizations which is runs the gamut around the disability employment related issue.

And, to keep on that line, we use the dialogue to gather knowledge, to inform the action cycle, but also to leverage components of the action cycle and go back to the knowledge creation. We will be going through the dialogue today to help you understand how these tools can help you in your knowledge translation effort.

So, we are going to take you through the steps of our process which, as you see on the top of the slide we have one through six and they mirror the knowledge to action framework. When we host the dialogue, we identify problems. So an issue of that we are looking to gather input around to determine what information is out there? What gaps are out there? What barriers are out there? And then, we ask the stakeholders to help inform the question of being asked, help us identify the issues around a problem. Help us come up with ideas to help us solve a problem.

We use data from the dialogue to see if our messages are reaching our audiences. We, then, tailor and implement other interventions to reach the audiences. We monitor the knowledge use. As people are participating in the dialogue, we are checking who is coming in and checking the stats of people really reaching the audience we want to reach with using our monitoring the dialogue to gauge participation and responses as if the question being asked is actually reaching the audience we want it to reach and so forth. We evaluate all the outcomes, meaning we take a look at all the ideas, the comments, the voting and analyzing data. From that set of action items are created that are policy oriented.

We’ll take a deeper dive so you can understand what we really mean by all of this. Our first step in hosting online dialogue is to identify the problem. Why are we doing this? What do we want to learn about? What are the expectations? What is the purpose? What do we want to accomplish? How are we going to frame the question so that stakeholders respond with ideas to help solve the problem at hand?

Then we are finding we adapt the knowledge to local context and define campaigns and topics. What do we mean by this? We have an overarching question, for example, to inform a policy initiatives or policy effort. What are your ideas on A, B, C? Then, we come up with campaigns and topics around that question in order to help stakeholders really refine their ideas.

We also figure out who? Who are we looking to reach? We really need to understand our target audiences in order to have people respond. That adage of if you build it they will come is so not true, especially in crowd sourcing. You must build it and then reach out to get people to come. We often use social media tools for that to help spread the world about our dialogue. And the when. Establish the timeframe and set the time line. This is very important in crowd sourcing events. Setting a time frame and not leaving it open ended. Establishing a sense of urgency so people know they feel they must respond at this time. Because you are competing against a lot of other efforts and everyone's busy lives. So, you know, making sure you reach the audience that is most appropriate. You are using language that they will ‑‑ they will respond to and establish that time frame and timeline.

For our dialogues and process, we have a team as we mentioned earlier, in the introduction. It is the team that is the village that makes this successful. The same with our dialogue. We have what we call moderators. These are individuals that are subject matter experts. They are people who are familiar with the issue. They are really the ones hosting the dialogue. We asked our moderators to respond to participants. These are the stakeholders that are coming in with ideas and comments. What we found to be a very successful practice is responsiveness. People know they are on the other end to respond and listening, they are more prone to participate and take their valuable time to participate.

We also have facilitators which are individuals who are thought leaders, other subject matter experts and moderators ask to participate. They know they have an interest in the dialogue and would participate. Our technical assistance team as Hope and our team we do outreach, data analysis, reporting and legal. These are all elements of a team that make successful dialogue.

This step three is probably ‑‑ I think all are important, but probably one of the most important. One we determine a determination registration process. This is our opportunity to collect information on the participants to make sure we are reaching the right audience with the right messaging and so we are getting not just quantity, but quality. We want to make sure we are reaching the right people. It allows us to gather some details about them. Not personal information, but more are they from the correct stakeholder group or the people you are targeting. For example, employers or advocacy groups or that sort of thing.

And ‑‑

>> HOPE ADLER: Can I jump in here to just comment on what you are saying? There have been some questions about this. We do collect information about those who register just to make sure that overall we are reaching the right people so we can kind of adjust outreach and just make sure that the right people are coming to the dialogue. In terms of identifying personal ‑‑ attaching a person to an idea. When we provide the host organization, all the ideas at the end of the dialogue, there is no connection to an individual if they get a download of the ideas. Even when we do download about members, it's just general information in terms of, you know, these many people from this state. This many people were advocates and we will share some of that.

On the back end, Katia and I are able to connect e‑mails to ideas but there is kind of a line of what goes to the host and what goes to the back end. We don't share any personal identification. We delete if anyone shares any kind type of personal information. Our collecting of this data this during the registration process is general analysis and to make sure we are reaching the right people.

>> KATIA ALBANESE: Thanks, Hope. When Hope demonstrates some of our events, I think this will be clear. What I'm doing here is giving you a little more detail about the process. Hope will take it through the implementation. What I'm trying to emphasize, too, in this part of the presentation is the importance of the customization of your target audience in order to reach people, especially in a virtual world now. They really need to feel you are talking to them.

So when we setup our community and this is using ideas we customize it for each of the dialogue we host. We use images of the people we are trying to reach so they can associate with themselves. We put as much information out there as possible. How does dialogue work? Who is trying to reach you? Why they are trying to reach you? How do you learn more about this topic? How do you contact us? Again, with our moderator, you ensure they are communicating frequently so they know someone is listening and they feel their participation is being valued.

We also do quite a bit of promotional outreach. So we create a suite of promotional materials. We have done more than 40 of these. We have a process. We have templates. It's easy to provide that to your host and get that information out through a draft of promotional e‑mails and invitations.

You heard us mention moderators and Hope will speak more about that. For moderators, we do quite a bit of preparation and we hope to demonstrate a new training for them. We provide moderator guidelines and best practices for them. We have a whole suite of training materials and helpful documents for them in order to make this process easy for them. Through their interactions and participation and our dialogues, or moderators help us come up with best practices including creating shifts. One of the benefits of the dialogues is the moderators are pinged, they’re getting e‑mails and somebody participates. It's not that someone has to be on line 24 hours a day. But in order to ensure there is engagement, the moderators will make sure they are participating in shifts they will engage and say, thank you for your idea. Because we are subject matter experts, you want to participate and be pulled into the conversation and it's a natural process.

One of the other best practices we have come across very early and it's to encourage the first posting of an idea. We talk about facilitators as moderators and subject matter experts involved in hosting the dialogue come to know people who will definite participate. They send information and ask them to please post the first idea. It's something simple, but we have seen many times it takes a while for someone to put that first idea up. But once that idea is up, others will follow. It's one of those human behavior that people don't always like to be the first or not sure what they are posting is appropriate. So that is something we have come across. Help them by getting that first idea posted right away. Outreach is huge. Really getting out there and encouraging participation and then, for us, there is ideas being posted that we know others would be interested if they knew about this idea. So there is a feature where we can forward the ideas to others. That is a way to also engage. One last best practice that we learned early on is that we move off topic ideas to additional input. Basically, sometimes people come to the dialogue and they are not contributing in response to the question.

Our moderators are trained to ask probing questions to really get individuals to refine their idea, to really pull out from all they are saying in response to actual question. Sometimes it's not possible. In an effort to not insult our participants in any way, we have topics called additional input. They may be good another time, but they are just not appropriate for that dialogue.

>> HOPE ADLER: Can I jump in and give two quick examples related to knowledge transfer that may be helpful to people? So when we do a dialogue ‑‑ for example, we did a dialogue on autonomous vehicles for individuals with disabilities how this can be helpful and how it needs to develop in order to be accessible for individual disabilities. So, we had a lot of subject matter experts in the dialogue, engineers, etc., automobile companies, developers. When someone would bring up an idea, it would be very helpful for the automobile to have this sort of acceptable technology.

We could then shoot that idea to somebody who is an engineer at Volkswagen and say this was our idea, what do you think? This person could respond and say that doesn't work under this context or it does work under this context. The ideas can get refined and you have subject matter experts speaking to each other, which really helps continue the conversation. I mean, one of the things, the roles of a moderator and one of the things about our crowd sourcing is that it’s really a discussion and looking to gather ideas and refine them at the same time.

>> KATIA ALBANESE: Thanks, Hope. And this is something you'll hear Hope stress when she is demoing our examples of our dialogue, but outreach, outreach and more outreach. That is a big deal. That is how really ‑‑ it is what will help make any of your efforts successful and I'm sure you already know that in doing your research activities. But targeted outreach strategies and messaging is very important. Leveraging partner networks and key stakeholders. So asking through our partner network or stakeholders to reach their network is viral marketing.

Publicize and promote the dialogue through formal and informal channels. Formal communications are great in finding organization and lists and all kinds of outreach talents to reach markets. And sharing information with people you know would be interested in participating and asking them to do the same.

>> HOPE ADLER: We use a lot of social media. A lot of our outreach is over social media channels, Twitter, LinkedIn, etc. And we use social media to drive traffic to our different either to Twitter or to our online, so we do a lot of back and forth with social media.

>> KATIA ALBANESE: Social media crowd sourcing is similar, the platform. If we are able to reach people on social media, they are very comfortable, usually with also participating in the crowd sourcing event.

One of the questions that was just posted in the chat was do we use ads. For our policy work we do not use ads. It's all organic sharing. We do create graphics like this one that you see on this slide now.

So, we try to use all the social media channels and, again, as we mentioned before, provide promotional materials and package of them and graphics and using the imagery from the dialogue to our partners and other stakeholder groups and organizations that represent our stakeholder groups. That is one of the reasons we have e‑policy works Twitter chats. That is here on our slide.

>> HOPE ADLER: We managed over the years to create a community. We have done over 40 dialogues. Often, we are reaching out to the community again to help us refine our idea and help us further it and take it to the next step. You'll find we have a lot of people returning to the dialogue. When someone joins our community, we hope they are staying for a long time.

>> KATIA ALBANESE: One of the participants just asked what about people who are not tech savvy or engaged in social media? We offer all different ways to participate in our dialogues. We have done everything from having a phone line available to having people write letters and actually send them. We will post their ideas for them.

Unfortunately, some of the dialogues are only open for a short period of time, usually two weeks to maybe four weeks. So snail mail may not be the best way to reach us, but we have taken ideas over the phone and we have also taken those via e‑mail and will contribute them and share with the person who posted that their ideas are contributed.

>> HOPE ADLER: We do a lot of technical assistance. We are accessible. So I always like to say there is not anybody that I haven't been able to get into the dialogue because we will often have people say ‑‑ you know, it's something new to learn. It's some way they haven't done it before. So some people will say it doesn't work, it doesn't work for me, I can't get in. For those we do a lot of hand holding. I’m willing to get on the phone with somebody and help them get in. Because once they get in once, they are part of our community and we can reach out to them for a variety of subjects in the future.

>> KATIA ALBANESE: One of the other tactics we have that has been successful is integrating Twitter chats into our dialogues. During the poll, we asked you what social media tool you use the most in engaging your stakeholders. You said Twitter. It's exactly why we use Twitter chat. As much as the outreach we do, we are still not able to reach everywhere. But in the Twitter sphere, we can reach a bigger audience.

We host a one‑hour chat hosted by e‑policy works. So @epolicyworks. We feature key leadership or subject matter from organizations that represent the key stakeholder, the key target audiences for the dialogue. We do that because it's very important for people who are represented by those groups, they feel a trusted relationship with it whether it's a membership organization or it's a research institute or university there is a relationship that the stakeholder has with that organization and they feel that is a trusted representative for them. We have them in our Twitter chat and answers a bunch of questions and answers around the dialogue. We have a conversation in the Twitter sphere. That has instant viral implications. It just helps us spread the word pretty quickly., then we encourage people to come back to the dialogue to continue that conversation. We found that to be a successful engagement strategy and provide more knowledge and content with the dialogue itself. The idea gets posted there and we will help transfer over.

The final step is collecting all the data from the dialogue. From the Google analytics to, you know, the number of ideas and comments and votes and to prepare a summary report where we do a level of analysis looking for common themes in the ideas.

We utilize some of the assessment tools that IdeaScale has available. Crowd sourcing platforms have various tools available. There is an assessment tool and review scale that allows us to reach our host organizations like DOL and others can assess the actual content of the idea and do other analysis using the tool. And from that, we analyze the ideas and post‑organization take action and respond. That is one of the things we ensure with all of our dialogues. In preparing for us with the host they are clear on what the call to action is and how they are going to respond and how are they going to use this information? It's very important to communicate to stakeholders that what they are providing is going to be used and how is it going to be used?

This is just a quick glance at some of the tools available through IdeaScale Again, the analysis and the review scale. I'm not going to go into too much detail for you here.

I am going to turn it to Hope to walk us through some of our most recent dialogue.

>> HOPE ADLER: Hi everyone. That was great. Thank you, Katia for that overview of dialogue and how we use them. I'm going to share some specific examples of recent dialogues we have done. We have done so many different dialogues. We have done specific dialogues dealing with specific topic covering a certain demographics and huge dialogues that effect many people and with thousands of people involved. It really depends on the subject matter.

This dialogue we did back in March. It was a Covid related dialogue. We did it really quickly. We put it up quickly. And, you know, some of the advantages of using IdeaScale is ‑‑ we picked IdeaScale, but there are many crowdsourcing platforms. We can get the dialogue website up quickly, it's easy to use and accessible to everyone, meaning it's compliant. It's 508 compliant and very usable, simple. That is why we choose to use IdeaScale for a crowd sourcing platform. This particular dialogue was put over the course of less than a week.

Covid, it was very important to the federal government to get information quickly back on some of the compliance materials. So the question for this dialogue, the information we were looking for is feedback on the compliance materials that they were developing for Covid. They were asking not only what was needed in terms of compliance materials ‑‑ sorry I'll backup related to FFCRA which was regulation coming out specifically around family and medical leave and Covid.

So, they needed feedback as they were writing this regulation out of DOL. Normally, this process, it would go to the federal register and take a long time. This they needed quickly and was a matter of several weeks. They were asking individuals to give them feedback on how to ‑‑ what is the most useful compliance materials and how to get it out there? What is the best way to reach people to let them know their rights and responsibilities under the new federal Covid‑related family and medical leave?

So, there was on overall question and different topics related to the stakeholder group. The stakeholder groups we were trying to reach were employers and employees. First, employers. How do we get the information out to them, so they know what their obligations are related to family and medical leave specifically related to Covid and this was in March? So this was right in the beginning.

And the employees. How do we reach employees? Now a lot of employees are home. They are telecommuting, teleworking. We are talking about people in farms and factories. What is the best way to reach them to let them know what their family medical leave is under FFCRA? And state and local governments how to work with them because they were developing their own resources. We reached out to those groups.

We delivered 17,000 e‑mails. We did 8 specific e‑mail blasts. We do a lot of targeted outreach. Of those 17,000, 4,000 were opened and we normally hover around 20 to 30% open rate. We also did a lot of tweeting from our dialogue. We had 17,000 promotion views on our dialogue. We did 24 tweets. About 8% of our traffic came from social media. Twitter, Facebook, LinkedIn and others. We do a lot of promotion over them getting the word out. We had 45,000 visits to the dialogue. As I mentioned, our dialogues are open to everyone. Anyone can see it. About 3,000 of those came from social media.

As we talked about before, we do track in our registration questions who is coming to the dialogue. This allows us to pivot if we need to reach out to different organizations, if we need to do a different type of outreach and allows you some analysis in the responses.

So, we heard from a lot of employers and private business. They had a huge stake in FFCRA. There was a lot of questions about Covid and how they can handle employees that either have to isolate or quarantine who had children at home, et cetera.

We heard from insurers, health care providers, local governments which was great. We heard about what local governments were doing. We heard from advocacy organizations, from employees, you know, what they were experiencing on the job. And then employer groups and employee groups.

Then stakeholder engagement. These were the different organizations that participated in the dialogue. We asked them to help us spread the word. Alaska Department of Labor, cities, Chambers of Commerce, SHRM. We do part of our outreach is asking organizations to help us spread the word. The more people we can get engaged in dialogue the better, especially stakeholders we want to hear from.

These are the results in terms of participation in the dialogue. We had 1300 ideas. We had 1200 comments and then 13,000 votes. Approximately a little more than 5,000 registered for the dialogue. These ratios are pretty consistent over the dialogue which is kind of interesting. After doing so many, you start to see how many people you need to reach, how many people will register and how many ideas get posted and those continue overall our dialogue.

As Katia mentioned the Twitter chat. In the middle of hosting this FFCRA Covid dialogue we did a Twitter chat. We put together three featured guests. So we had someone from SHRM who is the side of human resource management, someone from the National Employment Law Project and someone from Direct Employers Association. We try to hear from different voices. Our Twitter chats are scripted. The featured guests know the questions, they know they have their answers prepared. We use a hashtag so people can follow along. We do a lot of promotion. Individuals from the public can participate. They can use a hashtag and chime in. We had 167 tweets that used the hashtag within an hour, which was great. We had 23,000 impressions and about 41 active tweeters who were there and responding to the questions. What is great about all our Twitter chats are people start sharing resources, which is fabulous.

So, we can see for this case, you know we are looking at compliance materials and we could see what people were doing at the state level and even employers, which was great. And then we always used the Twitter chat to pull people into the dialogue. So, a lot of the Twitter chat is reminding people that the conversation continues in the dialogue.

pressure, lots of attention both from the administration, from the public and we had a few key themes and takeaways. Just in case you are interested, there was a lot of need for clarification and information on FFCRA. People were interested in anything Covid that affected their lives. It became very clear early in our dialogue, which is now true for most, is that teleworking is becoming more and more prevalent and any compliance materials needed to reach people at home. So, posters in the office wouldn't work. It was also clear that the department of labor needed to consider rural, agricultural and some of the harder to reach employees because they were being affected by Covid as well.

We also talked about a lot of states doing webinars, podcasts and stuff online. There was a need for that information to come out in different formats.

>> KATIA ALBANESE: There are a couple of questions in the chat about the process for monitoring and how we monitor the dialogue and how we monitor or measure when multiple ideas come in from a single participant. Can we talk a little about the monitoring from this dialogue?

>> HOPE ADLER: Sure. And the people that helped post the dialogue were amazing. They had a team of moderators. So they picked ‑‑ I can't remember now ‑‑ 10 to 15 individuals who were actively watching the dialogue. So, they were responding to ideas through comments. If someone left an idea, they were responding. If someone needed assistance say for, you know, a resource, they were posting resources. They are acknowledging ideas. If somebody posted something that was not relevant to what we were trying to dialogue ‑‑ this was a little different from others we had done because people really needed assistance.

So, normally, when we do a dialogue, we try to keep it on track. So if we are looking for knowledge or information about a specific topic and someone comes in and starts talking about something else, we quickly move that idea out of the dialogue. So through the crowd sourcing platform, you are able to easily move ideas to outside of the dialogue. But in this case, people were looking for clarification or information. So, we were responding to those ideas.

So, the moderators were making sure people were on topic, they were asking questions. We really haven't had problems with one person submitting 800 ideas. I think what is interesting over our 40 dialogues, is that people really are trying to add value. We don't pay anybody, but they come, they participate, they try to add good ideas. We really don't have any rogue participants or somebody trying to fill the dialogue. Sometimes we have advocacy groups and not that often who will reach out to their constituents and ask them to submit ideas and sometimes they give them specific wording to use. And that is very easy for us to deal with because through the dialogue we can highlight ideas that have similar wording. And we don't delete those ideas or get rid of them, but we are able to group those together. So, if we start to see something that looks like a letter writing campaign, we can group those ideas together so they are one idea.

It doesn't mean we ‑‑ nothing is lost in the process. That idea is still taken into consideration, but this is not a survey. This is really to get ideas. Remember really an idea generation platform.

>> KATIA ALBANESE: On that note, Hope, two quick things. Two questions asked. One was about compiling the volumes of qualitative data. Hope mentioned there are tools in IdeaScale that help us do that. We use Google analytics. We do a lot on our end. We are thankful for our partners at IdeaScale because when we do this dialogue and do such an event with lots of information and we are looking to do reporting on a daily basis and going through all these ideas that are posted, we are working with them to improve their tools to help us in our dialogue. So, I don't know, if Hope you wanted to add to the qualitative data gathering and some of the challenges and considerations there?

>> HOPE ADLER: For this dialogue, it's a ton of information coming in, especially for this one. What we did with this one, which was great, we had subject matter experts as our moderators. We had them at the end of each day pad ideas that should be sent to different agencies at DOL. While the moderators were in the dialogue, they were making some quick analysis of the ideas.

At the end of the day, I could run a report of all the ideas that were tagged a certain way. So, say they were all tagged like wage and hour issues. Then I could down load those ideas and send them over to the wage and hour department at the DOL.

Another thing we did at the end is the subject matter experts went in and tagged ideas that they thought were new and innovative. We have done this a couple of times with different dialogues. So, they just go through the ideas and they tag the ones that are new and innovative and those ideas get down loaded separately at the end of the day so those ideas can be looked at more with more of an eye. Especially when you have so many ideas, that lets us pull out each day a list of ideas they wanted to take a second look at.

I know we are running out of time and we wanted to have questions.

I just wanted to highlight as one of the other dialogues we did and based on the knowledge frame work. This dialogue was asked a question ‑‑ the Department of Transportation was trying to put together a strategic frame work, an accessibility strategic plan. Normally this would go to the federal register. Instead, they decided they wanted to do this dialogue and hear from stakeholders on what should be included in the strategic plan. They had five goals that they listed. It's getting stakeholders involved in the beginning of the process. A lot of advocacy groups have very clear goals for transportation. They were in here and submitting their ideas. There was a very high quality of ideas in this dialog because a lot of them already had platforms they wanted to share. So DOL kind of gathered a whole bunch of information at the beginning before they went ahead and wrote their plan. This was another really successful dialogue.

This one we are really looking for transportation professionals, advocacy organizations, researchers, people with disabilities, developers and really asking them how do we address these accessibility problems and what should be in the strategic plan framework.

So, again, similar. We sent out 17,000 different e‑mails ‑‑ I mean 17,000 e‑mails, 5 different groupings. Almost 3,000 which were open. We did a lot of tweeting. It changes for dialogues. This dialogue got a lot of Facebook traffic. I think it just depended on the different organizations that were promoting it. Again, this had almost 13% of the traffic came from social media.

These are all the different organizations that participated and helped us spread the word. We had universities, we had state governments, we had research centers, we had Easter Seals and Ford Motors and General Motors. In this case, you have the users, the developers, the researchers all participating and having a conversation. So, you have the universities that are doing transportation research and then you have states who are doing implementation and then you have universities and Ford Motors. One of the things I like about the dialogue is you really can have a conversation.

Here are the different participants. We had people with disabilities. We had policy makers. Tons of advocates. Transportation providers and employees. And this is really for us, again, to make sure we are reaching the right population.

So, for this ‑‑ like I said, we have dialogues all different sizes. We had 128 ideas in this dialogue. 968 votes, 83 comments and 102 active users.

Again, we had a bunch of takeaways from this dialogue. Some of the interesting ones, which I think were really helpful is the participants brought up a lot of different types of transportation that make DOT hadn't been thinking about when they were putting this plan together. Trains, airplanes, hard scape, sidewalks, medians. People sent pictures of things that were not accessible.

They also talked about, which I thought was great is careers. Making sure careers are accessible for people with disabilities. Something that I don't think was considered to be part of the frame work initially. So, we got a lot of great information from this dialogue.

So now we only have two more slides left and I think it's perfect. We are just going to go over what we learned in doing all of these things, these dialogues over the years. First being that crowd sourcing and Twitter chats are a great way to work with your community and interact and have conversations.

Outreach –

>> KATIA ALBANESE: Before you go into the second engagement tactic, one of the questions in the chat was about using the benefits of this platform over Facebook group and why we do so. If we ever did use online survey forms before and if we think for someone who is low budget if gathering stakeholder feedback via online surveys or Facebook are a good way to do that? I think that goes along with the first engagement tactic.

>> HOPE ADLER: The difference for us between crowd sourcing and Twitter chats and how this catches on is we really wanted to have the right people around the table. The real goal is to have an online discussion. Those surveys can be really helpful and we have used them in the past quite a bit. We are putting out one today. It really doesn't support a conversation. And for us, a lot of the value in our event we have these ideas which are great, but the conversation in the comments below the idea really can be extremely valuable. Just like with knowledge translation, the idea gets refined. Somebody can post an idea and somebody can comment, we tried that and found it worked but we had to do this. Then someone will respond, we did that in our state and it was really successful or we added this to the idea and made it work. As the discussion goes on and dialogue progresses is you have of this whole conversation under the idea. Like with the transportation, you can have Ford Motors jump in on comments that came from the National Federation for the Blind who leaves an idea and someone from Ford Motor jump in and say, we tried that. Do you think this would work? Do you think this would solve the problem? For us, what we were looking for was an open platform where everyone could participate, the general public and we could have a discussion. And it needed to be accessible. For our needs, IdeaScale met them at the time. I'm sure there are others that are just as good.

>> KATIA ALBANESE: I think we are close to being out of time if you want to run through these next tactics.

>> HOPE ADLER: Yeah. Just making sure we do a lot of outreach. You can't just put it up and expect people to come. You have to do outreach. You need to do outreach to the people you want to hear from. We ask people to help us, the community to spread the word. We have the stakeholders to help spread the word. The more people we can get the more robust the data is. We share results and encourage and sometimes require that our hosts take action on the ideas.

We have created a community and the only way people come back is if they feel like something happens after the dialogue.

Over time, we have really learned that in order for any crowd sourcing event to be successful you have to be agile and flexible, responsive. You have to be willing to change and pivot. For us, we work in the federal government. I think this is true for any organization to understand and respect the approval process is a lot of make sure it's right before you make it public. We rely on our moderators 100%. They respond to ideas and comments and they are the key to success. People, again, want to know that someone is listening and something is going to happen if they take the time to submit an idea.

We do a lot of recording and updates to the host as well as leadership in the federal government. We make sure that when people participate their ideas are heard by the people who need to hear them. We rely on our community. Like I said, they help us with participation. They us in commenting and spread the word. In turn, we make sure that they are a part of the cycle, the circle. Like we check back in with them and let them know what we did with the data and what it resulted. Sometimes we will even do follow up dialogue down the road. I think this should be the last slide. Yep. So, you can find us at ePolicyWorks.IdeaScale.com. Follow us on Twitter. Feel free to reach out with us with questions. We are currently hosting one dialogue and several others scheduled for late this year and early next year so you can always check back in.