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COVID-19 FACTSHEET 3: HOW TO EFFECTIVELY ENGAGE WITH PEOPLE ONLINE

Help through Crisis (HtC) is a £33 million National Lottery funded programme set up by The National Lottery Community Fund, the largest funder of community activity in the UK. It supports 69 partnerships across England which help people who are experiencing or at risk of hardship crisis to overcome the difficulties they are facing to plan for their futures. The HtC learning, support and evaluation (LSE) team is a consortium of organisations commissioned by The National Lottery Community Fund (The Fund) to help build understanding and capture learning from the HtC programme.

In response to the Covid-19 pandemic, the LSE team is developing a series of factsheets to support HtC projects as they respond to new ways of working in lockdown and beyond. This factsheet explores how organisations can effectively engage with people online. Previous factsheets focused on [staff wellbeing](#) and [digital inclusion](#). If you would like to get in touch or have suggestions for other topics we could explore, please contact: HelptthroughCrisis@ipsos.com

Summary

Due to Covid-19, HtC projects have been redesigning their services as they seek to continue to provide effective crisis support. Social distancing restrictions and remote working policies have led to the closure of offices and advice centres. As people are no longer able to physically attend advice sessions, drop-in centres or group activities, HtC projects have moved elements of their work online. However, online approaches are new to many HtC projects, and there is some hesitation and uncertainty about the best way of continuing to offer support.

At the same time, the Covid-19 pandemic means there is a higher level of need for crisis support. The financial, health and social impacts of the lockdown have both exacerbated existing crises and resulted in new crisis situations for some people. Individuals may also lack confidence or face specific barriers to accessing support online, reflecting their personal situation and needs. For example, insights from The Fund's Women and Girls Initiative suggests that many women and girls lack the private space required to have a confidential conversation with a support worker remotely (Smeaton et al. 2020). It is therefore important to consider the specific needs and wider context of individuals when providing support online. There is no one way of providing support that will work for everyone HtC projects need to engage with (Strand et al. 2020). As with face to face support, online support can be tailored by continuing to take a person-centred approach, even though the support is being delivered in different ways.

Charities – including crisis support organisations – have been considering how to provide 1:1 advice, group sessions and wider signposting online. They have been exploring new ways of using online video conferencing and other platforms that have become a key part of how people communicate since the start of lockdown. Organisations need to use the skills and expertise of their teams to design new delivery approaches that meet the needs of the people they support. Crisis support staff and frontline workers should feel confident and equipped to provide support online, using their skills for listening, providing emotional support, and building trusted relationships with people.

Not all crisis support can be delivered online, and it may be necessary for crisis support organisations to continue providing some face to face activities for certain groups. This will become more important



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as lockdown eases. However, online activities offer one way to continue providing crisis support services during the Covid-19 pandemic. As such, this factsheet focuses on different ways of engaging with people online. It shares advice on setting up activities and selecting an appropriate platform, as well as how to deliver support from agreeing the 'ground rules' for a session to building rapport. It can be read in conjunction with the [factsheet on digital inclusion](#) which explores how to support people to navigate the internet and access support online.

Setting up online activities

Ensuring activities are set-up in an appropriate way is essential when delivering services online. Having clear processes related to privacy, confidentiality, data protection and safeguarding is especially important in an online context when individuals (and staff) may be interacting from home. Agreeing and embedding organisational processes can help guide staff to protect themselves and the people they are supporting before, during and after online activities.

Organisations should consider agreeing protocols related to:

- **Data protection:** Supporting people online may involve collecting more or different data compared to working face to face. It is important to have processes in place to protect and appropriately handle any personal information you collect while working online. This includes information collected during a call or video (e.g. audio recordings), details in registration forms, or any information that could be linked to an individual such as their name, address, contact details, health record, religion etc. [This guide](#) from the Information Commissioner's Office (ICO 2020) includes frequently asked questions about data protection and Covid-19 and shares links to wider resources.
- **Confidentiality:** At home, staff may not have a private room to use to have sensitive conversations as they do in a workplace. Instead, staff should consider the place they use to support people and what kind of conversation they are having so they can take steps to protect privacy and confidentiality. If possible, staff can make phone or video calls from a private room or use a headset to increase the privacy of a caller (SCVO 2020). Staff should also consider their own privacy and what (or who) they are letting people see in the background of video calls. One option is to use greenscreen backgrounds that are available in some conferencing apps such as Zoom or Teams.
- **Online security:** Lots of resources have been developed to support people to use video conferencing services safely. The National Security Cyber Centre (2020) has developed [a guide](#) for organisations using video conferencing services safely as well as an [infographic](#) containing tips for downloading, setting up and hosting video calls. They have also produced an [accessible guide](#) for people using video conferencing services. Crisis support organisations should be mindful about where and how information about sessions is shared. For example, never posting the meeting code or dial in details for a session directly on social media as doing so means the session is no longer private and secure (The Catalyst, 2020).
- **Safeguarding:** it is critical that organisations ensure their safeguarding procedures are translated and applied to online activities. Extra precautions should be taken to ensure that staff and volunteers are not inadvertently putting vulnerable people in contact with strangers, people are protected from harmful content or cyber bullying and there are transparent processes around disclosure (SCVO, 2020). The Social Care Institute for Excellence (SCIE 2020) has developed [advice on safeguarding adults](#) during Covid-19 and the Oglesby Charitable Trust (2020) has collated [safeguarding resources and training](#).



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Selecting an appropriate platform and activity

There are a wide range of different platforms available to engage with people online. There is no one platform that will suit everyone and different places may be more appropriate for different individuals and different forms of support (The Catalyst, 2020). For example, someone without a private space may want to participate through a chat app, while others might prefer to use video calls (MEAM 2020). Safety and accessibility considerations are also important in deciding which platform to use.

Organisations may want to consider using different platforms and activities to engage with people online, providing flexibility for people seeking support and mitigating against the risk that a platform may be temporarily unavailable (Charity Digital, 2020a). Some of the key approaches for providing support online include:

- **1:1 support** through a video conferencing platform or chat app where a support worker has a direct conversation with an individual. A session could take place at a scheduled time or as part of a drop in e.g. using chat functionality.
- **Online group sessions** using a video conferencing platform to bring together different people. This could be part of a support session or as a way of hosting lived experience groups.
- **Webinars and websites** providing information or signposting to resources for people looking for support. These resources can be accessed at a time that is convenient to an individual.

When designing or delivering online services, crisis support organisations need to think about the benefits and drawbacks of the platforms they are planning to use, and the risks associated with setting up online activities described above. Tech Soup offers a [side-by-side comparison](#) of different video conferencing tools for charities (Hooper 2020) which may help to identify a suitable platform for different activities. Third Sector Lab and SCVO Digital (2020) have developed a [Google Sheet](#) with case studies and good practice examples of how charities are delivering services online.

Building rapport online

Hosting a session or speaking to someone online is different from building a relationship face to face. It may feel more unusual or challenging in some respects, especially when connecting with someone new. The Catalyst (2020) offer tips for enabling greater comfort and engagement in online sessions:

- The first online session can be used for familiarising everyone with the platform and approach, with a focus on getting everyone signed in and holding basic check ins.
- The volume of information generated in online interactions is different from face-to-face support. When considering holding group sessions, try to keep these on a small scale so everyone can engage and share. While each session will vary, an average of 4 to 10 people (depending on the nature of the discussion) can help achieve equal engagement.

Other advice for building rapport includes the following suggestions (BBC 2020):

- Do not fear silence – while this might be harder to do on a call, sharing silence can enable people to feel close. As the speaker feels that they're being listened to supportively, silence may enable far richer, creative thoughts to be voiced.
- Use deep listening techniques – this means giving all your attention to the speaker, listening with genuine curiosity and without judgement, and then summarising their views to make



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sure you've understood correctly their words, emotions, and underlying meaning. This can enable people to feel truly understood.

- Equal airtime – in peer support or mutual aid groups. Make sure the time is shared equally between all people involved.
- Use gestures – for instance, touching your heart to convey strong emotions can help people connect through the screen.
- If you use a laptop, place it on top of books or somewhere where it's raised, so that the camera can capture you at eye level.
- Hide your self-view if you are using video conferencing tools as getting distracted by our own face can hinder the process of connecting with another person.
- Consider using a shared background – elements that are visually connected can feel as though they are more related.

The Women and Girls Initiative (WGI) has shared their [experiences](#) and [lessons](#) from delivering support online. For example, one project shares photos and names of staff so women can see who they are speaking to, while another has delivered sewing kits with instructions so women can work on their sewing together when they meet online (Scott & Frost 2020).

Agreeing the 'ground rules' of a group session

As well as ensuring the right security and confidentiality procedures are in place, everyone involved in an online activity should know what to expect ahead of joining. The 'ground rules' of a session may be decided by the person running the activity in advance and clearly communicated to the group or agreed between the group before a session begins (MEAM 2020).

Providing clear joining instructions and information about a session helps individuals to know what to expect and make the most out of the time available. This can include guidance on how to access a platform and the option of carrying out a test run if people are using a site for the first time.

Organisers may want to consider agreeing parameters around:

- **Anonymity:** Maintaining anonymity during an online activity protects participants' personal information and may make it easier for individuals to share sensitive and personal issues (Strand et al. 2020). However, it may also make online activities feel more impersonal and can be a barrier to engagement. People should be told in advance whether an activity will be anonymous or not and how they can ensure their information is protected. For example, instructions could cover how to change a username, switch off video, or how not to reveal personal information during the discussion.
- **Session length:** It is important to be clear about how long a session is going to last so people can prepare and set aside protected time, as well as supporting staff to bring a session to an end. Encouraging people to join 10 or 15 minutes in advance of a start time can help ensure everyone is able to access the platform and set up their preferences before a session begins. It can also help to give a reminder 10 minutes before the end of a session so that participants are able to make final contributions, ask questions and discuss what happens next.
- **Focus and format of the activity:** Clear boundaries about the purpose of the session should be established in advance so that individuals know what will be discussed and whether it will be kept confidential, helping them decide whether to join. This can be particularly important in a group discussion as exposure to other people's circumstances may be difficult and



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potentially lead to distress (Smith-Merry et al. 2019). Boundaries can be negotiated with participants and involve conversations around content and anonymity.

- **Who will be involved and what their roles are:** Groups should also be aware of who else is joining a session in advance, and whether they might know them. For example, whether a group is going to involve other people accessing a service, volunteers, staff or funders. This can help to manage expectations and inform whether someone wants to join or not.

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