2 Planning and designing your online event(s): The beginning

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Introduction

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  - Preparatory survey for participants
- Crossroads and possible directions

Since 2020, as the COVID-19 pandemic restricted physical gatherings, online events have gained more presence and relevance than ever before. There is not one right name for online get-togethers but many: online convening, online event, virtual convening, online gathering, virtual get-together, virtual event. The terms we are using the most are online event and online convening, though online event will be used more frequently throughout this guide.

The common nature of any of the terms used is of a dedicated and shared presence, and participation in a safe space with an intention of learning and acknowledging each other from our unique positioning, contributions and contexts.

The definition of online convening that resonates most with us is that of an organised and recurring online gathering of a particular community that features theme-bound set of online events in multiple spaces that compose the main program flow.

The term online event denotes a specific, but wide enough frame of various formats that can entail different activities online. Throughout this guide we will be focusing on the questions and approaches related to the process of a single, general online event design and implementation. However, in some sections of the guide we will share an overview of considerations when organising convenings and/or larger scale events with multiple sessions.

Online events can be of different formats: they can range from small question-and-answer sessions to large-scale conferences with thousands of participants. They can be synchronous: happening in real time on the same platform where everyone participates at the same time; or asynchronous: taking place in one or a combination of platforms with the pace of participation that is based on participants' time, resources, sense of safety and availability. There are also hybrid events that

combine elements of physical events and online events, however, that format is not included in this collection. They’re not part of our learning process yet, but they are a format we want to explore and organise in the future.

The logistic nature of online events might seem more subtle yet it is not less relevant or challenging. You will be relieved of the cumbersome visa processes or the process of identifying and choosing a venue that is safe, accessible and friendly for all participants. The challenges that online events bring might not appear immediately but they will ask you for a detailed preparation that ensures access and participation for all participants. For example, the features, interface and user registration requirements of platforms where the event will take place has implications we are still discovering and assessing.

When organizing an online event, you will be confronted with the complex task of communicating and agreeing on the best time and flow to ensure participation. These are related to two aspects of our reality. There is an increase in offering of online events today, parallel with the lack of culture that understands them as requiring an exclusive and dedicated presence, whereas offline events are given that parameter by default. The understanding that attending online events requires clearing our agendas of other commitments, whether work-related or personal, is yet to be assumed as a shared standard.

Finally, make sure to celebrate the commitment you, your organisation and all of your participants are making together. As this is a collaborative process, it requires a lot of planning, much more patience, flexibility, imagination and communication, and from our experience, a pinch of frustration with sprinkles of joy - for it to work altogether.

Core principles and practices

When considering to organise and host an online event, there will be many questions to consider such as:

- What do I want to accomplish? What is my goal?
- What format and technology should I choose?
- Who are my participants? What risks are involved?
- Is my event accessible?
- How long should my event be?
- Who needs to be involved in designing and implementing the event?
- Do I want to use the event later as a resource?

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All these questions revolve around the overall approach to the design of your event which is different for every organisation. How we answer these questions stems from the foundation: our core principles and practices that we base the entire event on. Below you will find various questions and additional elements added under different sections that rest on this foundation. [Illustration for Cathy includes more questions from sections]

An event is rooted in individual and collective values and principles; it never starts or sits in the vacuum. Before planning, imagining, and designing an event take some time to review your core documents, agreements and practices. Go back and review the values, core principles and policies that belong to your group or organisation as online event organiser.

Think about the foundations that you have and elements that you as an organisation want to bring in. What are the core principles that constitute the foundation, the DNA, the kernel of your event? They can be written in formal policy or embedded in your practice. Look for them and review them, or reflect on your past events and practices. Your organisational principles and values will be your compass. They will help you make decisions, filter the variables and invest in some components throughout your planning, implementing, closing and follow up of your event. This exercise will also help you in identifying possible gaps and considerations that become more relevant in moving your event into the digital realm.

- **Safe space.** Consider the privacy, security and anonymity needs of your participants to ensure you are creating a space that holds minimal harm and is enjoyable for all, with clear steps and protocols to address concerns. Running a risk assessment exercise will help you to reflect and will inform your choices. For a risk assessment check our FTX: Safety Reboot.
- Think about the ways you can weave care into your approach when planning your online event, both for your team and participants. This can be reflected in considerations around event duration, time zone considerations, accessibility, safety, session design, self and collective care activities, etc.

- **Values and principles informing your events and your technological choices.** APC is guided by Feminist practices and politics of technology.
- **Choice of technology.**APC prioritises free/libre and open source software (FLOSS) and open standards, as to remind us that our choices need to be: Driven by community needs, sustainable and secure.
- Think about all of the stages of the process and credit previous projects, contributions, sources, people, etc. APC is committed to using CC licensing when acknowledging previous contributions, projects, as well as the labor of persons, groups and movements. Providing attribution connects and contextualises our work within the trajectory of open sharing and collective knowledge building.

APC, as many other organisations, has defined through the years which values, principles, and policies apply to events we organise. Our Code of conduct and ground rules are applied to both APC-hosted online and offline events, including internal organisational meetings and members/network convenings, as well as program and project conferences and/or training events:

"The Association for Progressive Communications is committed to providing a safe and welcoming environment for discussing issues related to its community. The APC Community comprises members of the network, all APC staff and team and its larger network of partners, friends and allies.

The code of conduct and ground rules apply to member meetings, all APC hosted events, conference-related social events, such as parties or gatherings at restaurants or bars and spaces, and includes our mailing lists, wikis, platforms, websites and any other spaces that APC hosts, both online and off."

All APC events are intended to be SAFE spaces and we ask participants to be guided by mutual respect, collaboration, consent, awareness and recognition of diversity, and acting in fair and honest manner. These are some of our main ground rules, however, depending on the context and content shared during the convening there are more ingredients added and specific APC principles are further applied. Our principles and practices that inform and guide our convenings and events evolve and transform as our community evolves and transforms.

Moving from the physical to the online environment - the relationship and principles that shape the technology which hosts and makes the event possible have taken a prominent role. Through planning and creating our events we have learned on their applicability, their limitation and their empowering framing. One of the major outcomes is the understanding that we need values, principles and policy to guide the planning and realization of online events which are environmentally respectful on the short as well as longer term.

Two key values recognised and formalised in our work define APC event's relationship with technology:

- Policy on use of free/libre and open source technology

- Feminist Practices and Politics of Technology

Check in
You can read more in the following sections where technology choices of platforms and tools are presented. Throughout the different sections of the guide you will find/discover/see how APC values, principles and policy have informed our choices, methodologies and also confronted us with the challenge of combining them or have to prioritise one over the other.

Principles and practices of participation

Nurturing an environment where each person feels seen, heard, and their experience acknowledged - contributes to a work flow that welcomes shared learning, intersectional conversations, mutual support and creative collaboration. Here are our Principles and practices of participation that we value and apply in our events:

- Create a welcoming, safer and more accessible space for all participants
- Acknowledge and value different histories, diverse identities, lived experiences, and the knowledge everyone offers and brings into the shared space.
- Consent, privacy and confidentiality are non-negotiable and unconditional as a baseline of trust.
- Handle disagreement constructively and non-violently.
- Zero tolerance on disrespect, harassment and violence in any form.
- Embed politics and practice of self and collective care.
- Be collaborative, open and participatory in your approach.
- Be mindful of language, access layers and context diversity, and be supportive of self-expression to the autonomy, extent and pace of each person.
- Self-reflect and recognize the specter of power and different (lack of) participation privileges in terms of situational capacities and structural inequality, including context, access, language, gender, different accessibility needs, public speaking/participation skills, etc.
- Be willing to de-center your perspective and always listen to each other with an open mind and heart.
- Extend compassion and kindness to everyone you are sharing the space with.
- Attribute and give credit to previous projects, sources, contributions and also the investment from everyone in the shared space.
- Adjust your participation pace to your needs. Reach out if you need support at any point.

If you find this useful or resonating with your experience and values, read the extended version of the Feminist Principles of Participation, which inform APC’s Principles of Participation, along with the Code of Conduct and Sexual Harassment Policy.

Why? | Unique value and general challenges

Questions in this section

- **Why do I want to host this event?**
- **Could this experience be an opportunity or a risk for us a team?**
- **What challenges should I consider during this process?**

Online events require a substantial amount of time, resources, imagination of digital spaces, and skills invested in the organising process. Choosing to host an online event rather than using alternative ways of communication (e.g. email, forums, instant messaging) can be a daunting task with many organisational challenges and should thus be grounded on specific needs that cannot be addressed otherwise.

Before you are fully on board to host a specific online event, ask yourself these questions to decide if your event is necessary and timely:

- Why do I want to host this event right now?
- Does it add any value that other formats fail to provide?
- Could a paper or an email help me and my organisation achieve our goal with less investment?

Do you have a pressing issue on which you need to decide swiftly? From our experience, the best option is probably an online call, rather than exchanging emails. A webinar, as opposed to a recorded video lecture, offers the possibility for learning, interaction and participation. A workshop, as opposed to a kit of documents and guidelines, creates a dynamic space between participants and allows for sharing and cross-pollination. On the flip side, all of the online events require participants to have time availability, technology, internet access and dedicated presence, which might be challenging when working with people across the globe.

Could this experience be an opportunity or a risk for you as a team right now? The workload around the design, implementation and follow-up of the event can definitely serve as a new learning and bonding experience for your team, and it can also boost your personal and organisational capacities. However, if your organisation has already shifted some or most of the work online, one of the aspects to keep in mind is the current level of digital fatigue within your team in the context of burnout prevention. Talk to you team and discuss some of the challenges that you think might come your way based on your sense of capacities and shared intention to organise your online event. That can help you think about facilitation of internal and external risk mitigation in the overall process.

Here are some of the challenges to consider when thinking about organising online events:

- Planning, design and implementation of online events is a time consuming process (research, learning, and practice regarding technology, platforms and tools)
- Risk assessment and mitigation measures should be adjusted (digital safety, privacy issues and policies of certain platforms, etc.)
- MEL tools and activities need to be adjusted.
- Access and participation is hindered by structural discrimination and exclusion of people. Online events require access to technology, rely on the internet access, stability and uninterrupted electricity - which can limit the participation of women, queer communities and people in rural and (post)conflict areas, or people with different needs.
- Time zone issues that impact program design, participants' focus and engagement, etc.
- Multiple or non-native language(s) used which requires translation, interpretation, close captioning and adaptation of the content to meet different accessibility needs of participants.
- Digital privacy and safety issues that involve additional actions and considerations on specific policies related to platforms chosen, participants' personal information, their context, and content shared.
- Organisation (and participation) requires focused and dedicated presence before, during and after the event, when most of the work and activities are already taking place online.
- Policies and guidelines on participation for ensuring a safe environment during the event (including effective facilitation) need to be designed and adjusted, as power dynamics and unequal power relations are present in online just as in the offline space.
- Sharing, connecting and networking during informal get-together sessions need to be initiated in designated spaces.
- Organisation and participation in your online event has real costs. Budget has to be carefully planned, including costs around supporting participation.

Check in

Throughout this guide, you will find content around the responses to most of the issues listed above. In the next section we will talk more about the goals of the event, and we hope that these two sections combined will be helpful for your initial considerations as a factor in the decision to organise your online event.

What? | Goals and possibilities

Questions in this section

- What do I want to accomplish?
- How does this event contribute strategically to the change I want to see?
- What are the possibilities of my online event?

An online event should be relevant to your organisational strategic plan, long term goals and theory of change, advance your mission and lead to more impact. Having a clear goal for your online event will help you in the approach to the overall process of planning, monitoring and measuring the success of your event. A clear goal will especially help you in your choice of format, content, technology and key roles involved in design and implementation. From our experience, it's best to focus on 2 - 3 goals, maximum.

Ask yourself these questions before making a decision:

- What do I want to accomplish and where do I expect to land?
- How does this event contribute strategically to the change I want to see?

Here is a provisional list of some possibilities and opportunities that you might want to consider:

- raise awareness on a certain cause and change attitudes
- mobilize your community members and increase their participation
- strengthen the relationships, alliances and partnerships within your community
- enhance your community's skills or capacities in a certain field
- empower your community by providing a safe space for support, self/collective care, exchange of experiences and strategies on a specific topic
- collectively inform your membership base on the course of your organisation, connect with peers or expand your membership base altogether
- design and conduct strategic planning, or conduct meetings to reach a decision on a certain issue within your organisations
- promote your community's accomplishments, showcase artwork, or promote a recent collaboration and open a discussion for a feedback from a wider audience
- deepen the knowledge around a particular subject by inviting different groups, keynote speakers
- expand and diversify your community reach and collaborations as distance is not a factorin terms of travel
- enable participation that is based on people's realities (eg. self-defined pace, anonymity)
- enhance your capacities and skills on both personal and organisational level
- build a resource pool by adjusting the event material that can be used after the event ends

- create different methodologies based on your experience, lessons learned and what worked in your context

It is important to note here that each of the goals you set will have to be adjusted to the format of your event, your capacities and participants' needs. That requires additional activities and strategies, bearing in mind particular parameters of a specific format of the event. For a detailed approach around your goals and format, go to section "How to choose the best format that suits my online event best?".

Also, if your event was initially planned to take place in person, you will need to includes some adaptations and reframing around achieving your goal. For example, if you are considering about organizing an art workshop, now online - you would need to think about digitalisation of hardcopy material, adjustment and presentation of the content, techniques and interactive tools for engaging participants, platform options for breakout rooms for different group activities, budget considerations in the sense of providing art materials for your participants, etc.

Check in
Now that you have a general overview of your goals, opportunities and challenges, there are other decisions awaiting you through the next pages. We hope that these two sections have supported you in making your own rationale for your event. Keep an open mind that many elements we are sharing here can be combined, adjusted or reinvented altogether based on your own sense as you go through this guide. We will now be heading in the direction of your participants.

Who? | People, participation, context and access

Questions in this section:

- Who will attend? | Participants and context
- Is my event accessible? | Documentation, technology and access
- Preparatory survey for participants

Who will attend? | Participants and context

> Based on our learning experience, organizing and hosting an online event often feels like weaving questions, decisions and practices that are made in the name of safety, care, rights and that center people. What enables the presence, commitment and mutual learning - is the trust. The participants who show up at your event come because they trust you as an organiser, or they trust their friends and community members who invited them to the event in the first place. This vouch is something you are given as an organiser based on the labor, investment and credit of relationships. It’s the connecting tissue and a source of power that builds, holds, nurtures and moves the entire community. It’s because of this trust that we are committed to making spaces safer, more accessible, and holistic - through an intersectional lens.”
>
> - From our conversations with hvale and notes

Online events pose different access and safety issues and challenges as your participants are coming from different or shared contexts, with different needs. Participants of your event might be your community members, members of your organisation, general public, wider audience on your social media page, members of a specific community, women, LGBTIQ+ persons, human rights defenders, persons with vision, focus or hearing difficulties, with different needs and capacities. You might be inviting people from a specific country, region or from around the world, with one shared or tens of different native languages spoken.

Be mindful that we all have different lived experiences, different degrees of privileges and disadvantages both offline and online within different systems of power that are built at the intersections of our gender, race, age, language, religion, ethnicity, mobility, sexuality, mental and physical health, income, housing, profession, etc. That means that the levels on the spectrum of priviledge(s) and disadvantages are never the same for all people. Based on that, the understanding and practice of safety and daily lived risks just resonate differently to each and every one of us. For these reasons we apply intersectional lens to our approach.

> Intersectionality is not primarily about identity. It's about how structures make certain identities the consequence of, the vehicle for vulnerability. So if you want to know how many intersections matter, you've got to look at the context.

> What's happening? What kind of discrimination is going on? What are the policies? What are the institutional structures that play a role in contributing to the exclusion of some people and not others?"[1]

As part of your preparation consider exploring, designing and running a risk assessment from our FTX:Reboot kit to tap into safety practices and strategies and begin to apply risk assessment framework.

When organising online events, we should always be guided by the needs of participants. The golden three rules of facilitating and supporting participation at the early stage is:

"Don't assume. Ask. Adjust."

Consider making a survey and include your participants in the design process. The risk assessment and survey combined will surely help you identify risks and expectations your participants have, and it will also be your guiding star for the technology, content and the tone of the entire event.

Check in
Throughout this guide you will find various approaches that are embedded in deep care when thinking about different aspects of safety that are in service of protecting, honoring and celebrating one's own self-defined sense of (digital) body, data, heart and mind. One of the aspects to keep in mind when it comes to your participants is facilitation during your event. Our section "(Re)imagining facilitation" might be of help for balancing safety and care while supporting the participation of diverse people with different lived experiences.

Footnotes

[1] Williams Crenshaw, K. (2018, September 27). *Keynote at Women of the World 2016 – March 12, 2016*. Archives of Women's Political Communication. https://awpc.cattcenter.iastate.edu/2018/09/27/keynote-at-women-of-the-world-2016-march-12-2016/

Is your event accessible? | Documentation, technology and access

Accessibility is often an afterthought in online events, when it should actually be a priority and central to the planning process from the beginning. Mobility, access to the internet, electricity, private space and technology altogether remain a barrier for a large number of people, especially women, queer communities, people in rural or (post)conflict areas, people with different needs. Participation and access are always layered: both in physical and online events. They depend on the context, resources and needs of your participants. There is one common note for both physical and online events. Being aware of the path ahead of us, we need to be mindful that participation embodies the privilege and discrimination of our physical lives.

To ensure that you address this consider planning your event by keeping different people with different needs, capacities, resources and levels of access in mind by involving your participants already in the planning and designing stage. Apply the golden three rule and ask your potential participants what would make their participation easy and possible. Below you will find some questions and considerations to take into account at the planning stage and that are also relevant for your survey design. We also recommend going through How to Make a Virtual Conferences Queer-Friendly: A Guide by Queer in AI and Ensuring Virtual Events Are Accessible for All by RespectAbility.

Documentation and accessibility

- Universal best practice is to provide any written, audio and visual materials ahead of time so that people have an idea of what to expect and can plan in advance. Its also good for participants to have the material handy offline, in case something does not work as expected.
- Make sure you use accessible file formats and content (consider readability, color contrast, image description).
- Is the material welcoming, queer-friendly, different needs-friendly and supporting of diverse lived experiences? Think about language, tone, pronouns in your surveys, registration forms, content, privacy, etc.

Participants and access

- Do your participants have access to a private space with internet connection? Do they need to allocate to a friend’s place? Or do they need support for secure connecting? If

your participants don’t feel safe in their environment - they will not be able to participate in your event. Think about human rights activists, LGBTIQ+ persons, violence survivors, people with different lived experiences - and keep in mind that some content shared can compromise the safety of your participants and limit their participation. For example, if one lives with their parents, siblings, or friends or in countries that have oppressive governments/regimes. Consider allocating digital participation grants that might support their participation.

- Do your participants have access to a reliable connection or uninterrupted electricity? Think of your format and adjustments, such as asynchronous type of activity, phone dial in, and consider digital participation grant in your budget.
- Do your participants have access to a personal or shared device? This will determine your budget as you would want to consider per-diems for renting equipment, or local costs of travel to a community centre with access to computers. Also, think about adjusted safety protocols if one is using a shared device to access the event, for example VPN, or reminding them to delete history, cookies and passwords.
- Does your event require participants to use some external materials, conduct analogue activities and do they have the means to do so? For example, if you are organizing an art workshop or drawing related activities, consider including per diems as to make sure your participants have the materials.
- Is participation burdened by caring roles your remote participants need to fulfill at home: do they have a relative they need to attend to? Are they in charge of meals, babysitting? Again, think of digital participation grants (allowance/per diems) so that you can support their participation.
- Will you include captioning, sign language interpretation, image description or other potential accommodations for different needs? Make sure you ask for the materials from your facilitators and speakers in advance, so you can make adjustments.
- Is the language used during the session shared language for all participants? Or will there be multiple languages used? For this you will need translation of the material and during the session.
- Think about adjusting the pace of your session. It will determine the level of focused engagement, overall participation, as well as the speed of translation, interpretation and close-caption delivery.
- How will you enable informal spaces for interaction and networking? Consider games, designated channel for informal communication, etc.

Technology and accessibility

- Is the platform you’re using to host your online event compatible with assistive technology like screen readers, captioning, contrast adjustment?
- Are your participants familiar with platforms that will be used for your event? Consider a short manual in accessible format and/or offer assistance.
- Ensure the platform you’re using does not have a complex interface.
- Double check the choice of the hosting platform, it’s options and limitations. Check if it allows for computer-based and phone-based audio listening/speaking, chat block options, private chat options.
- Suggestion: Have a point person for accessibility before and during the event.

Check in
Honor the dedication, presence and commitment of your participants to access and take part in your event and support the plurality of their lived experiences. Plan to have this reflected in your approach to event duration, breaks and care sessions, registration and documentation design, facilitation during the event, language(s) and accessibility adjustments, protection of your participants' privacy and your commitment to build a safer environment.

Preparatory survey for your participants

Between the initial planning and the actual design of your event, involve and engage your community, your potential participants and ask them what they need as to participate, commit and enjoy during your event. A well composed preparatory survey for your participants is a great practice, as it will give you a closer insight on assumption of participation and expectations. It will also help you make informed decisions on your content, timing, format and tools that you will be using.

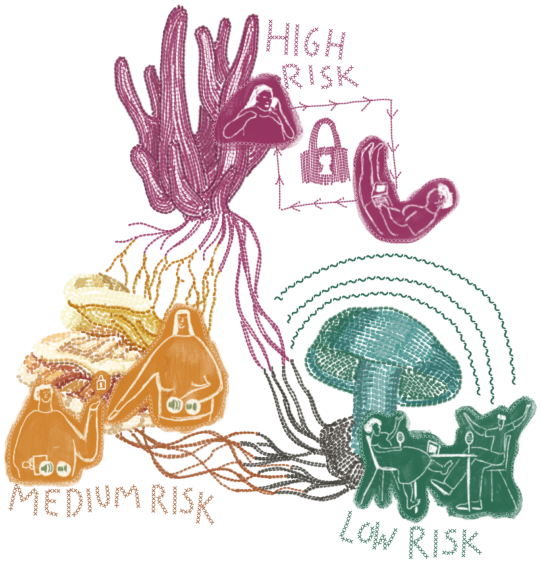
You can share your survey separately or as part of your registration form. One benefit of sharing it separately in the planning stage is that it gives you more time to map the challenges of access and prepare a participation plan. Go through the questions and considerations listed above and design your general foundational survey questions. Keep the survey short and include an option for people to leave their contact information in case you want to do a follow up.

Here is a sample of APC's layout structure for a preparatory survey.

- Content
  - What would they like to see happen during the event
  - Anything they do not wish to see taking place
  - Interest in co-facilitating sessions
  - Option to propose a session
  - Other content questions you find relevant
- Safety and accessibility
  - Availability of appropriate space where a participant feels comfortable to have their video camera on
  - Time zone and time availability
  - Language considerations (including language preference for subtitles and interpretation)
  - Other accessibility and safety concerns you find relevant
  - Option for participants to list accessibility and safety concerns they find important
- Device and connection
  - Type (laptop, desktop, tablet, smartphone) (optional):
  - Operating system and version (mac osx, linux/ubuntu, windows, other) (optional)
  - Device brand, model, other specs (ram memory, processor) (optional):

- Type of internet connection and speed (check upload and download speed at https://librespeed.org/) (optional)
- Favorite browser and browsers installed device (optional)
- Possession of equipment for video conferencing (webcam, headphones and microphone)
- Other questions you find relevant

Crossroads and possible directions



Your risk assessment and your survey combined will help you decide on the final format as well as specific technological solutions. Who and how many persons will attend, their contexts and needs will also determine what policies need to be in place to respond to material and strategic online participation needs. Alongside, it’s important to accept limitations, map out risks and meet the challenges that might arise as to support the participation in your event.

Based on the questions/answers from your survey, and your risk assessment - here are some crossroads that we hope can be useful for you, as you will have to consider certain directions on format, technology and budget at this point.

CROSSROADS QUESTIONS	POSSIBLE DIRECTIONS

Safety: What are the risks this event might pose to your participants? Are some of them already exposed to risk?	If the event poses a high risk for your participants, this will determine your choice of technology and budget considerations, as well as the format of your event. If the risk is high, you might need an asynchronous type of event (email or audio) with secure channels of communication, and a budget item such as a digital participation grant, if possible. If the risk is medium, you would need to have a limited number of participants on a closed video conferencing platform with clear safety protocols, including secure channels of communication with your participants, and a digital participation grant, if possible. Another option is to combine a synchronous and asynchronous type of activity. If the risk is low, you could go for various formats, such as a livestreamed event on social media platforms, a live question and answer session, or an “open to all” drop-in session. However, your safety protocols would still have to be agreed on, as real-time interaction requires immediate response in case of serious violations of your principles of participation.
Number: How many people will attend your event? Limited or unlimited number of participants?	Every tool has limitations, including video conferencing platforms. Based on our experience and testing through events, for a limited attendance event (up to 55 persons attending), one option is to use a FLOSS platform with client-side processing load, such as BBB. For events hosting more than 55 and/or an unlimited number of participants, another option is to use a server-side processing platform. There are additional risks and challenges that might arise should you opt for an unlimited number of attendees when choosing your format. For example, livestreamed events on social media platforms require real-time response regarding chat moderation, chat block options, etc., which can be challenging, and you will need your tech team on board for designing the protocols.
Access: Do your participants have access to a device, stable internet, uninterrupted electricity and a private space?	If the answer is no, and the cost of digital participation is not affordable, then you will need to adjust your format, such as an email, text or audio message-based asynchronous meeting, which might be the most accessible format. Another option to meet most needs is to choose a platform that supports phone dial-in, and consider a digital participation grant in your budget for participation support, if possible.