BUILDING A STRATEGIC APPROACH TO COMMUNITY ENGAGEMENT!

bangthetable®

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Overview

Online engagement presents a unique set of challenges and opportunities that require effective and planned consultation design. One of the most important aspects of this planning is how to effectively capture feedback and data that will help you make decisions.

This workshop focuses on the development of a consistent and strategic approach to the inclusion of online tools to broaden the reach of all your engagement processes. The workshop is recommended for community engagement professionals looking to improve or streamline their approaches to creating or growing their use of online engagement.

Participants will work through a ten-step checklist to design an online survey and engagement approach and will leave with a toolkit to assess and build individual and organizational consultation capability. Participants will also gain understanding for which online tools to use for specific objectives within their projects.

Learning Outcomes

On completion of the workshop, participants will have achieved the following learning outcomes:

- Examine current processes and how they impact your organization and the community
- Address the value of an organizational framework for community engagement
- Identify where and how online tools can enhance your projects
- Look at audience identification, tool selection, the management of risks and analysis of results
- Initiate the development of a strategic checklist for your organization's engagement processes

About Bang the Table

Bang the Table, the leader in online community engagement, provides a software platform that enables governments to build and nurture online communities. Offering the convenient alternative to live town hall forums, citizens participate online in an exchange of information, become informed on issues and weigh in on initiatives, perspectives and solutions surrounding projects.

Bang the Table's software platform, EngagementHQ, was built by public engagement practitioners who are passionate about empowering organizations to connect with the communities they support. The platform encourages engagement and feedback through its eight online engagement tools and offers insights with its analytics and reporting features. Organizations use this data to help improve communications with their communities and make more thoughtful, citizen involved decisions.

Bang the Table was founded in Australia in 2007 by public engagement thought leaders in an effort to provide a robust online forum and process to connect organizations and communities, primarily in the government sector. Bang the Table's software is used by organizations around the world, including those in Australia, New Zealand, Canada, the United Kingdom and the United States.

Please visit: www.bangthetable.com for more information.

Planning Online Engagement

1. Clear Problem Identification
2. Context. Background Information. Data.
3. Identify Target Audience, Develop Informed Cohort
4. Risk Analysis
5. Tool Selection
   a. Role Identification/Internal Processes
   b. Integration of Face-to-Face Engagement
   c. Scheduling
   d. Targets/Objective
6. Communication Channels, Social Media and More
7. Implementation
   a. Engaging Questions
   b. Engaging Information
   c. Branding
8. Reporting, Analysis and Feedback Loop
9. Evaluating, Improvising and Closing the Project
10. Community Capacity Building

PLANNING ONLINE ENGAGEMENT

Problem Identification

Start with Why by Simon Sinek

The “Golden Circle” created by Sinek suggests that starting conversations/projects/marketing campaigns (and yes, public consultations) with “why” vs. “what” or “how” will have better results. It builds a business case by explaining what is underneath the initiative and creates a framework for understanding motives and building trust. In the case of government, it helps community participants understand the origins of a project and the problems that the organization is attempting to manage through implementation (how) of the project (what).

Standard Development of Informed Consent by Hans and Annemarie Bleiker

The Bleikers have taught governments all over the United States about the value of clear problem identification, or decision identification, in the public sphere. They contend that many stalled or failed projects and the consultations associated with them fail because of an inability to complete this first step. The Bleikers contend, if you can explain the problem and your investment in finding the best possible solution for that problem, by investing time and attention into all of the necessary stakeholders, you may not create support in the community but your chances of reaching informed consent (a point where even those opposed will go along with the decision because they can clearly see that all impacts have been weighed and that there was a good decision-making process) will increase dramatically.

Many decisions have a "win-lose" dynamic attached to their outcomes or as problems become more challenging to manage, a "lose-lose" dynamic is attached to them. The task is to help those who are in a lose dynamic and those who advocate for those in a lose dynamic, to understand that their situation and the associated impacts were heard and heavily weighted in the decision process. This approach also allows your organization to lessen the impacts and/or give voice to ways in which to lessen the impacts from the decision-point forward. You are already working in partnership long before the decision is being made; creating an opportunity for the very best ideas to come forward.

This approach also requires clear communication and boundary delineation once a decision has been made. If you have engaged throughout a decision-making process and have listened with the intent of consideration but the process changes then that must be clearly delineated. Another common error in public consultation occurs when the public believes they can still influence a decision after that stage has passed.

Research Design and Engagement

There are loads of reasons to do community engagement: relationship and capacity building, education and participation toward behavior change, safety, awareness, and others. This workbook and the steps outlined for strategic inclusion of online tools is focused around community engagement for decision making purposes, indicating that the engagement will actually inform a decision, in some manner. The most important step in this process is to gain crystal clear clarity in what the decision is and how it is being formed; determining and clarifying who will ultimately make the decision as well as the process that will be followed to make it. If it is possible that a process will change as it moves forward, this should be stated and repeated with updates provided accordingly.

The focus for this resource is to highlight the importance of designing a community engagement strategy for decision making around clearly defined research objectives.

What is research design?

When conducting a community engagement for decision-making, it's important to understand the difference between developing an online engagement strategy and designing your research. Research design is more than just your online engagement strategy. Your strategy details what has to be done to complete your engagement, but the strategy should flow from your project's research objectives. The purpose of designing your research for decision-making is to ensure that evidence obtained through the engagement enables you to answer the initial problem as unambiguously as possible. In other words, getting the data you need to answer your research problem entails specifying the type of community input you will need to answer your question. To begin any research design process, you will need to ask yourself:

What type of evidence is needed to answer the question/problem or theory in a convincing and authentic way?

All too often in community engagement for decision-making, practitioners design surveys, setup online forums or begin interviewing far too early, before thinking through what information they actually need. This is why research design is crucial as part of any online engagement strategy.

Design vs. Method

It's also important to understand that research design is different from the tools by which your data is collected. While there are many online tools available for data collection including forums, interactive mapping, ideation and surveys, it is not uncommon to see these tools treated as the research design itself, rather than a logical structure of inquiry. This failure often leads practitioners to evaluate the strengths and weaknesses of the tools rather than their ability to draw information and feedback from the tools. Making this distinction clear will ensure you don't go head first into selecting your method/s of engagement without considering proper research design.

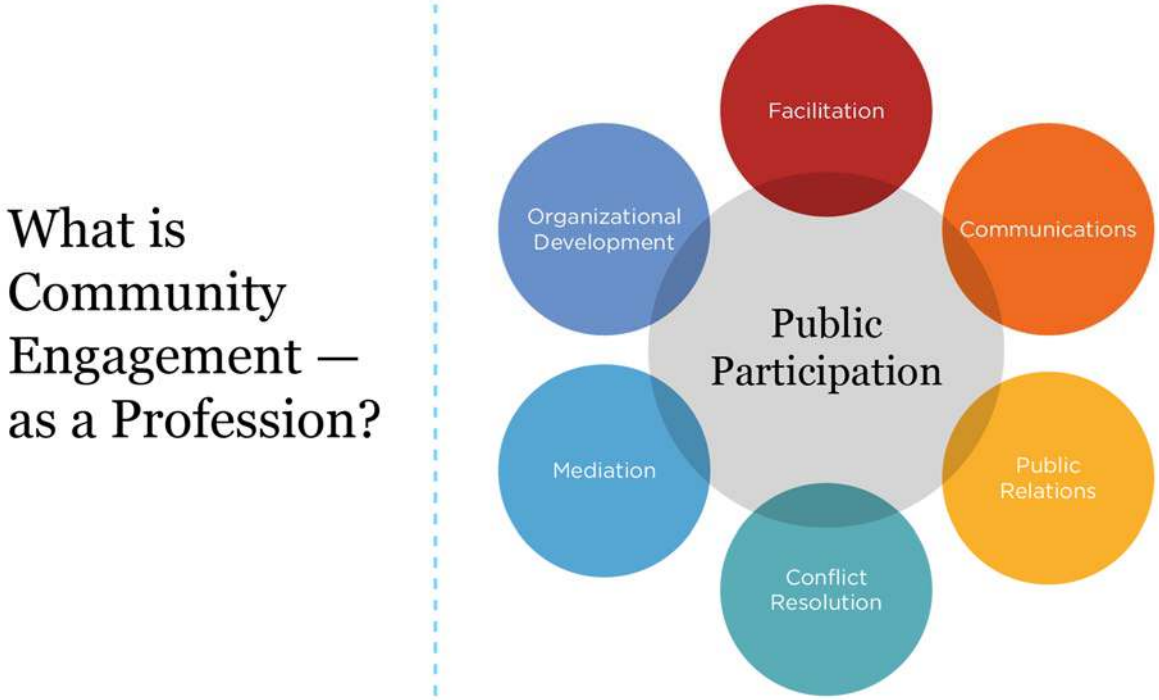
When considering your online engagement process as a mechanism for capturing meaningful research, it's a good idea to follow an engagement development process. There are many different processes that people use to set up their engagement; many organizations have a set of rules that guide best practice in this area--there is no magic number or path for success, but the process of creating a system and walking through it repetitively with your team will improve your public participation processes. We will follow the outline below with scenario examples and discussion. We recommend you add and change the checklist to make it work for you and your organization-add your unique requirements and process points.

Big Tip: There is typically not just one problem in a situation. This "problem identification" reference is for the problem that you need to solve using community input; i.e. the decision that needs to be made that must be informed. That is the engagement research that you will be mapping throughout this exercise. In reality, there will be other problems that must be solved to make this successful. Identify the other problems as you go and use your team to help problem-solve how you will address them separately from your research.

Roles of a Public Participation Professional

Roles of a public participation professional may involve organizational development, facilitation, communications, public relations, conflict resolution, mediation, and others. At times, these skills may need to be applied outside of your actual engagement to keep a process moving forward. For instance, you may need to orchestrate a mediated dialogue between opposing groups or you may need to use your public relations skills to get someone to an event for participation because you know they are key to consent for a project. These skills may be applied directly or may come in referral format to other parts of the organization or through partner agencies. At times, these additional activities/tasks can derail or take over a research-driven public participation process. They need to be kept aside as other moving parts that work together for the overall process.

Role of Profession



Notes:

IAP2/ Organizational Framework

IAP2 Spectrum of Public Participation

INCREASING LEVEL OF PUBLIC IMPACT

	Inform	Consult	Involve	Collaborate	Empower
Goal	To provide balanced and objective information in a timely manner.	To obtain feedback on analysis, issues, alternatives and decisions.	To work with the public to make sure that concerns and aspirations are considered and understood.	To partner with the public in each aspect of the decision-making.	To place final decision-making in the hands of the public.
Promise	"We will keep you informed."	"We will listen to and acknowledge your concerns."	"We will work with you to ensure your concerns and aspirations are directly reflected in the decisions made.	"We will look to you for advice and innovation and incorporate this in decisions as much as possible."	"We will implement what you decide."

Notes:

Step 1: Identify Problem and Objectives

Using Scenario:

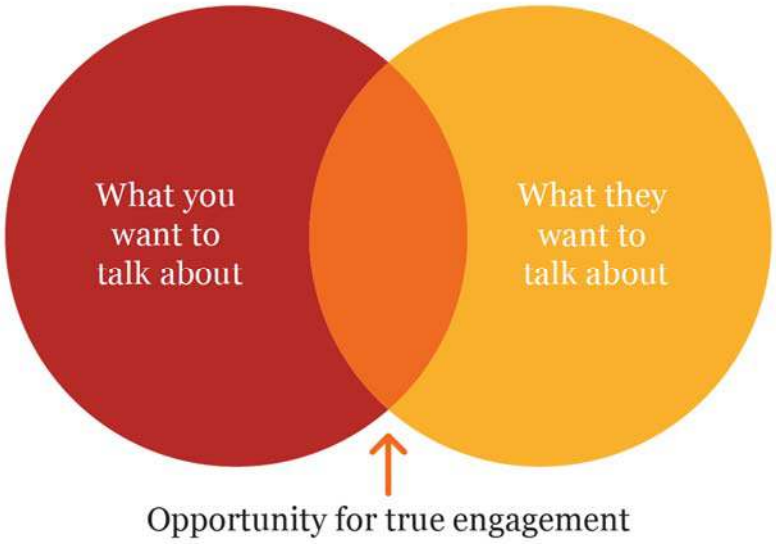
Step 1. Why are we engaging - what is the decision, project, opportunity, strategic objective or need *that the community can influence*? (Research problem)

Purpose statement for this community engagement project:
What problem are you trying to solve? What decision will this process inform?

Clear title for this community engagement project:

Even with a well-defined problem and clear sense of purpose in the engagement…

Relationships: The best listeners often make the most engaging conversationalists



Step 2: Context. Identify What You Already Know.

What information is already gathered or known about this project and engagement context?

Conduct a desktop audit/literature review – consider objectivity, reliability, credibility, facts vs opinion.

Think key internal intelligence: Project background/brief, Colleagues, Management Team, Elected Officials, Reports, Plans or Strategies, Insights from previous consultations, Community Engagement Policy and guidelines, Related Master Plans or Comprehensive Planning Information, Previous or policy-driven process guidelines (how have similar projects been run successfully or challenged). Resources may include individuals or groups with historical or other information.

Think external intelligence: Demographics: Census Bureau, American Fact Finder, local reports--like Community Foundations; Local government snapshots: community satisfaction surveys; Industry snapshots: industry reports, government reports, funding bodies, specialists/experts in the field, benchmarking reports, advocacy groups

Benchmarking with counterparts: input or insights from other area governments, quasi-governmental agencies or non-profits; Google or Google Scholar keyword searches; Social media activity (Facebook, Twitter, YouTube); Local communications: Nextdoor, Yahoo Groups (ask people to tell you what they are seeing), Previous newspaper articles.

Using Scenario, Vital sources of information for this project are:

Internal:
External:

Big Tip: Bring in stakeholders with a strong position (ideally each strong position so nothing is missed) on this decision and ask them what data is missing. What factual data should be included for Step 2. What information is already gathered or known about this project and engagement context? Ask them to help you complete a Desktop audit/literature review.

Step 3. Who? After Why, Start with Who.

Anyone who believes believe they will be impacted by this decision needs to have an opportunity to have a say! (Target population or stakeholders)

Who?	Online/In person/Both?	Tool(s)?
Project team members (skill sets, knowledge, time allocation)		
Council, Board(s), General Managers, Senior Management Team, employed and volunteer staff		
Board(s)		
Senior Management Team		
Staff		
Volunteers		
Neighborhood groups		
Special-interest groups		
Resident population		
Non-resident ratepayers, Border municipality		
Businesses, business networks, chambers of commerce, industry groups and associations		
Service or facility users		
Young people aged under 18 years (consider parental consent)		
Persons with Disability/Caretakers		
Commuters, visitors or tourists		
Absentee owners and part-time residents		
Neighboring governments: Local council members, state or federal		
Funding bodies if external funds involved		
General public (beyond municipality/region)		

Using Scenario:

Big Tip: Consider how you will engage the difficult to reach that need to be engaged on this topic. You must do a resource/need analysis at this point--who are the most important voices to be heard? How will you structure engagement to overcome barriers due to limited personal resources, motivation and/or cultural factors?

Internal Capacity Building through Community Building and Relationships

Balancing Need and Capacity

Big Tip: Remember the Profession chart and all those skills and processes? You are likely considering deploying at least 5 of those to bring different entities into this engagement effectively. Be sure you process this as a team. This is the “side-work” that takes up precious time and resources. Bring these activities into your discussion using the wheel below and plan accordingly.

Use the wheel to assure that time and budget resources are a healthy part of your decision process. This tool can serve as a conversation guide for your team to assure you have the right people on the bus, using all your resources to move in the same direction. This type of conversation can also help you balance “what you should do” with “what you can reasonably do” in a given time-line. It may help you prioritize and empower the public at an early stage, often the best way to accomplish your goal and to manage resources wisely.

Community engagement processes and the resulting relationship-building and connections created in the community can do much to move other initiatives forward and to build capacity internally. Imagine that you have an initiative to build multiple volunteer programs and you are working with the community--you are likely to identify many who would be great volunteers. It is a great idea to connect those individuals to the volunteer team managers; thus increasing internal capacity. As a process develops, there are many of these opportunities. Clarity in priorities and expectations is necessary to assist you in accomplishing these tasks while still moving the community engagement process forward. You may need to ask others to get involved for these additional outcomes to come to fruition or you may need to complete your process and address the internal capacity building as follow-up. In either case, keeping good notes and tracking community roles and interests are vital.

Every process and program conducted also gives the municipality a chance to showcase itself and teach others. What skills/knowledge/abilities are being delivered to the community and how can those enhance community objectives? Look for ways to maintain interest and motivation developed during the engagement process. What does it look like to sustain positive movement and who is best suited to lead? Perhaps it is an area where the municipality is lacking but the community is well-provisioned. If so, soliciting support from the community can be very effective. Clarity, strategy and buy-in are the key concepts as you look at the wheel below.


Structure
Secure Staff Resources
Obtain Financial Resources
Find Political Support
Acknowledge the Need for Collaborating with the Public
Growth
Municipality as a Role Model
Identify Municipal Leaders
Build Internal Capacity
Personal Dedication
Third Party Support
Value
Transfer Ownership to Public
Make it Easy for People to Participate
Invite People to Something Meaningful
Bring Sustainability to a Local Level
Capacity
Capture Community Efforts
Identify Community Leaders
Informing/ Educating Citizens
Frontloading (Teasing)

Structure

- Why is it important for the municipality to engage with the general public?
- Who do we have to have on board to get an engagement process going?
- Who will seek money for this project?
- How much capacity do we need to keep an engagement process going?

Value

- What do people in our community care about? How can they have a direct impact in their neighbourhood? How can behaviour change be seen locally?
- What is meaningful for the people in our community? What would they be interested in? (Keep in mind the different groups in your community.)
- Is it possible for citizens to give input on various platforms and channels? Is it possible to participate in an interactive way?
- When is the community able to participate? Are we clear about the process? Do we communicate it openly and transparently? Is it possible to engage and implement right afterwards? Do we give the "doers" the space to go to action straight away? How can we help people realize that their input made a difference? How can they see their input has been taken into account and how it is being used?

  - Early involvement
  - Clarity about the process
  - Allow for quick actions
  - Make community input trackable

Growth

- How can we be a role model when it comes to good communication, collaboration and sustainability?
- Who are the people that are respected, charismatic and have high credibility in the municipality? Who has a big network and good connections?
- Which skills do we need to engage with the public?
- Are there passionate people within the organization who enjoy working with the citizens?
- Are there sufficient skills within the organization to engage with the public? Can we get training or support to run an engagement process?

Capacity

- What is already going on in the community that we can build on?
- Who is well known, charismatic and influential in our community? Can we win them over for our project? Who are community role models that enable others to participate?
- What information is necessary to get an informed process going?
- How can we excite people before the engagement process starts? What events or speakers would trigger people to

Step 4. There Are Risks Involved

Risks & Risk Management

Assuming that overcoming various “fears” is critical to organizational uptake of digital engagement, what are the specific perceived “risks”? How real are they? And how can they be mitigated or managed?

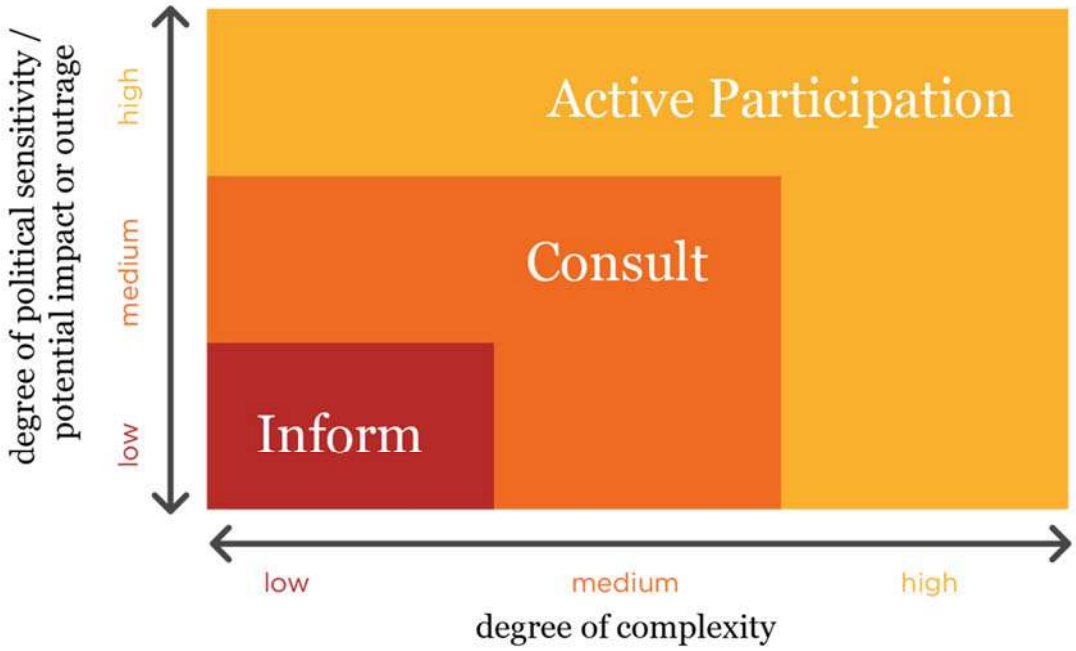
Why: While tedious, it’s the responsible thing to do! If you don’t, these fears will appear during public participation process, will influence selection of tools and will result in the wrong tool being used at the wrong time for the wrong reason. It will throw off your strategy and could negatively impact the entire effort. So, talk through what members of your team are afraid of and chart the fears…allow team members to vote or score as necessary. Discuss indicators. How will you know if the fear is becoming a reality? What are the signs? How might you react if you see the signs building?

Risk Matrix

High Impact / Low Probability = 2 (set indicators and observe)	High Impact / High Probability = 3 (plan for these, allocate resources)
Low Impact / Low Probability = 1 (don’t spend time on fears that land here)	Low Impact / High Probability = 1 (plan for these, use few resources)

Specific Risk	Indicators	Final Risk Profile	Reward Potential	Strategy Action

What If It Is Political? Make Sure Engagement Is Active!



Notes on Politics/ Complexity Chart:

Step 5. Engagement Tool Selection

Every tool has pros and cons and a suitable time and audience for use. Creating a pros and cons list can help you assure that you do not use multiple tools with the same cons--which might alienate a specific group. Consider using the pros as a marketing device. If you know that a given tool is highly accessible to the public and allows for the participant to learn about other positions (an online forum, for example), consider highlighting those reasons for use through your designated communications channels--in that sense, you've now taken a deeper dive into the "why" for the public.

Consider research ethics, privacy, photo consents and the value of incentives as you choose engagement tools. Be sure your associated policies are visible to the public at the time of participation. Having the public agree to those terms, prior to participation, is best practice.

Online and social communication channels should complement and extend reach of traditional channels.

Identify Where Project Phases/Questions fit on scale:

Inform	Consult	Involve	Collaborate	Empower

Big Tip: Once you have identified the phases or elements of the project and the role of the public behind it, begin to identify the information you need from the public to move forward either for a public decision or more likely for public input that you will pass along to decision makers. Recognizing that most processes require a report for others to make a decision, determine what elements you need to have in a report and be sure you choose tools (and later design questions) that will lead to the outcomes you need for reporting. Tools should make this job easier, not harder. Comment analysis can be very time consuming; look for tools that will aid this process. Utilize surveys or other tools that will produce graphs and images that you need. Begin with the end in mind.

EngagementHQ Tools Spectrum

Managing your project communications

Controlled environment

Participants cannot engage with each other. Data is stored in the backend and only accessible by admin.

Mixed environment

Participants can see other participant contributions. However, there is little peer-to-peer interaction. Some data may be visible to the public, other data is just accessible by admin.

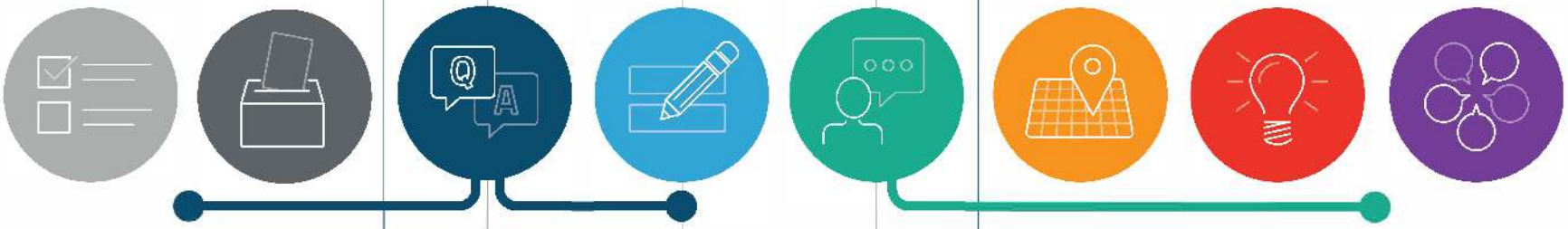
Answered Privately | Answered Publicly

Pre Moderated | Post Moderated

Commenting Disabled | Commenting Enabled

Open environment

Participants can engage with each other. Comments and ideas are visible.



SURVEYS

The Surveys tool gives people an opportunity to voice their opinion in a convenient and guided way, which has historically shown higher response rates than other formats.

POLLS

Polls encourage people to give a quick answer on one question, selecting from multiple choice answers. They are able to instantly see the Poll results, piquing their interest and giving you real time insight.

QUESTIONS

Questions is an issues management and communications risk mitigation tool. It is a managed space for your community to ask you questions and for you to respond either publicly or privately.

GUESTBOOK

Guestbook keeps things simple; people are only able to upload comments, which are moderated to manage what appears publicly. No other interaction is enabled.

STORIES

When we tell or hear a story, neuroscience tells us that we experience things on a higher and more resonant level. Stories helps your community better understand, empathize and relate to others as well as your project goals.

PLACES

Places is a simple way to gather community feedback and ideas directly on a map. Participants drop a "pin" in the area of concern, add photos and then fill in a quick survey.

IDEAS

Ideas provides "virtual" post it notes for individuals to add their ideas to a collective board. People like the ideas that inspire them most, helping align your priorities with what matters most to the community.

FORUMS

The Forums tool creates a space for discussion, dialogue and debate. People share their experiences with others, ask questions and have conversations in a safe and interactive environment.

Use Horizontal Axis for your target indicators/demographics, etc. Age, Accessibility, etc. Use squares to identify specific tools and questions you plan to ask via that tool.

Project:					
Surveys					
Polls					
Q and A					
Guestbook					
Stories					
Places					
Ideas					
Forum					
Newsfeed					

The Truth About Surveys

Web based surveys are by far the most widely used online engagement tool and are used as part of the process in 90% of online consultation projects conducted on Bang the Table's software platform EngagementHQ.

The hard truth however, is they are very often used incorrectly, without well-planned questions and objectives, which can affect overall engagement. Common mistakes include using surveys for inauthentic engagement by writing loaded questions that seek endorsement, unstructured surveys that leave people confused and frustrated, incorrect selection of question types, prolific use of essay questions encouraging free text without proper planning on how the data will be analyzed and not capturing demographic data which makes profiling responses impossible.

With a multitude of engagement tools now available for use in online engagement, knowing when to use a survey is crucial to ensuring you get the best input for your consultation. There are a range of survey tools on the market and many which are bundled with dedicated engagement platforms including EngagementHQ.

Big Tip: Consider a tool that allows you to "pin" a survey, meaning that the survey is visible, in its entirety, so that people can preview and then engage. This helps the public know if they have the information needed to complete the survey and it helps to reassure them that the time estimate provided is reliable.

Using Scenario:

Project Stage	Tools	Why This Tool	Agency Lead
Conception			
Preparing policy			
Draft			
Revision			
Decision			
Implementation			

Content

Great content can make or break your consultation process. It's not good enough to print out a 300-page draft plan and leave it in the Council foyer, or even an online document folder, for people to browse through. People need accessible and understandable content that is delivered in a range of easy-to-digest multimedia and multi-device forms.

Your content sets the context for whatever you are engaging about and if it doesn't grab people's attention you will struggle to get much feedback. There are several things to consider, be creative.

Use rich media to grab participant attention.

- Video: Make a video explaining the core issues. This can be recorded at your in-person event. Videos are the single most effective medium for getting across complex ideas. Video can be used to explain the rationale of a proposed plan, to call participants to action, to bring up specific "hot" issues or give the community a voice via interviews. Attention spans for video are greatest if kept under 2 minutes.
- Slideshows: Put together a few slides that break down information into bite-sized chunks. Take the key messages from your summary document and put them in a slideshow with supporting images.
- Photos: Stimulate participant imagination by using image galleries containing relevant pictures. This is especially relevant for planned developments. This works when getting people to think about a project's present, past or future potential. Infographics may also be useful as images to explain more complex processes, decisions or projects.
- Provide this content in the same space that you are engaging the community, so they don't have to go searching through your corporate website to find it. Create a one-stop shop for information and engagement.

Big Tip: Do not expect that you can use the same materials in-person and online. While some materials translate into both environments, generally plan on some editing to be required. Attention spans are shorter online and so materials need to be more concise. Having videos of in-person meetings or long reports is acceptable but should be available only for participants who want to take a deeper dive. They should not be the primary source for online information.

How do we track all of these moving parts?

Your organization likely has its own preferred documentation for project management. Class participants will share the resources preferred. A free template has been provided on the landing page for this course and can be found at www.officetimeline.com. See RACI model later in workbook for option.

In Person Integration

As with each step, both the input and output requires clarity. Be sure you understand the level to which you want to integrate in-person engagement and the online space. If you desire to have all of the public data in one report so that you provide comprehensive information then it is important to ask the same questions in both spaces. You can then either utilize your tools at the event or enter the data from the event afterward as an admin user but you will have to make sure the data sets align in order to do this. Best practice is to think of a few key items/questions that can be consistent and compiled into one report but be sure the design for both in-person and online, and associated techniques, are suited to their environment. You can provide summaries in both directions, as needed to audiences and allow an organic response or interaction to those.

Big Tip:
All projects don't require engagement in both spaces but virtually every engagement should at least be summarized and reported as a part of the whole. Think about the outcomes and the targets. What is needed for a comprehensive engagement? Remember the litmus test. What do you hear in one place that you would like to "check" in the other?

Goals/Objectives for Engagement Levels

Perhaps the most crucial step in creating STRATEGIC community engagement processes is to gain clarity on your objectives for engagement. Now that you have some clarity about who you need to reach, and how you are going to do it and how you will inform those populations about when and how to engage-let's talk numbers.

We all know the SMART acronym for goal setting. Use it and past experience to set realistic targets. If you are using a tool you have never used before, consider lowering the goals targets. Remember that repetition will breed familiarity and confidence for both you and the community.

Big Tip: Once you launch an engagement tool, your means for increasing numbers will come primarily through your communications and marketing strategies. They must coincide.

Measures

There are three general measures, or levels, of online engagement. You can equate these to an in-person experience as well or you can determine independent measures for other types of engagement--the key is to be clear and to determine how you will measure prior to initiating any campaign, making adjustments as needed.

Aware

An aware visitor, or a visitor that we consider to be 'aware', has made one single visit to your site or project. Our methodology suggests that a visitor who has not taken any further action (has not clicked on anything) can be considered aware the project or site exists.

Informed

An informed visitor has taken the 'next step' from being aware and clicked on something. That might be another project, a news article, a photo, etc. We now consider the visitor to be informed about the project or site.

Engaged

Every visitor that contributes to an engagement tool and is considered to be 'engaged'.

- Contribute in Forums
- Participate in Surveys
- Contribute to News Articles
- Participated in Quick Polls
- Posted in Guestbooks
- Contributed to Stories
- Asked Questions
- Placed Pins on Maps
- Contributed to Brainstormers

Engaged and informed are subsets of aware. That means that every engaged visitor is also always informed AND aware. In other words, a visitor cannot be engaged without also being informed AND aware. At the same time, an informed visitor is also always aware.

Big Tip: Clarify what sort of engagement measure you are creating when you set your goals. Is it awareness or engagement that you are seeking? If it is the latter, be sure your materials are clear about what you want the public to do.

Stakeholder	Objective	Tool	Measure	Population	Goal	Qualitative
Shop owners	Involved	Ideas, Mapping	Engaged	200	60	New ideas for how to improve the cultural profile of the City

We will discuss monitoring of engagements in Step 8 but note that it is these measures and associated goals you should be monitoring throughout the engagement process.

Step 6. Communications

How will you communicate with those who need to have a say and gather their input?

Communication = Information = the Foundation for all Engagement

Traditional communication channels (i.e., face-to-face, paper-based, meetings, posters, letterbox drops, articles in resident newsletters, advert in local paper, etc). Consider key dates, key messages, comms budget, incentives. Work with other groups and projects to cross-promote. Be creative but clear in promotions. Your choice of communication channels will have an impact on who you drive to your engagement tools. Be purposeful as you determine the target groups you need to reach for input. In some cases, communication channels may be a direct path to engagement tools. Be aware of this dynamic and be sure that you use a diverse set of communication tools, likely to increase the diversity in the population that engages with you on the topic.

Communications Planning

1. Internally, bring everyone potentially involved together, if possible. Make virtual attendance possible for those working off-site or unable to make a face-to-face meeting.

2. Identify the major timeline events for the project. Most groups work well by “backing up” from those. If Council has a study session on this topic November 1, then you must determine what research you will need to complete prior to that date, allowing time for compilation and analysis, as well as public reporting as required.

3. Ask specifically for marketing plans for other projects and how you can potentially cross-promote.

Start with a Chart: Identify Who Is Responsible Within the Squares

Start Date Here	wk1	wk2	wk3	wk4	wk5	wk6	wk7	wk8
City website								
Resident newsletter								
Twitter								
Facebook								
Nextdoor								
Signs/posters- specify by locations								
Newspaper ads								
Press releases								
Open house-specify location/purpose/target								
Others...								

Big Tip: Personalize your communications. Use a three-step approach: announcement, call to action and a reminder/last chance. See publications by Don A. Dilman for more specific recommendations about the three-step process. Outline the benefits, why it is important to have a say--continue to education on the "problem to be solved" and/or "decision to be made." Promote and carefully use incentives for participation. Think about what documents and links the public will need if they choose to take a deep dive on this subject and make those readily available throughout the process.

RACI Matrix

RACI is an acronym that stands for responsible, accountable, consulted and informed. A RACI chart is a matrix of all the activities or decision-making authorities undertaken in an organization set against all the people or roles. The model is used to help project managers understand who they need to involve in a project and in what way the individual needs to be involved. Utilize this or another project management model to specifically identify the tasks needed for community engagement processes to be effectively created, approved and shared throughout the organization. In some cases, an S is added to create a RASCI model as an alternative. In those cases, the S is symbolic of the support role—those that need to create materials or share information with additional audiences might be an example.

Big Tip: There may be more than one individual or group that are labeled with each letter—except for "A" as there is only one A in any given function/task.

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What is RACI?

Responsible

- "The doer"
- Person who completes a particular process step or leads the people who do
- Position working on the activity & responsible for implementation
- Responsibility level determined by individual with the "A"

Accountable

- "The buck stops here"
- Person who is held accountable by top management for implementation
- Position with Yes / No authority
- Only one A per function

Consulted

- "In the loop"
- Person whose advice is sought before a final decision is made and / or implementation takes place
- Position involved prior to decisions or action
- Two-way communication

Informed

- "Keep in the picture"
- Person or persons who are notified once a final decision has been made or after implementation takes place
- Position that needs to know of decision or action
- Informed after and only one-way communication

RACI Matrix

	Role 1	Role 2	Role 3	Role 4	Role 5	Role 6
Task 1	R		C			
Task 2	R		A		C	
Task 3	R	R	I	A		I
Task 4			C		R	
Task 5	A	C		I		
Task 6		I	C	C		R

Responsible

Person assigned to the activity.

Accountable

Person makes final decisions and has the ownership.

Consulted

Person who must be consulted before a decision or action is taken.

Informed

Person who must be informed when a decision or action has been taken.

RACI Matrix

Role / Task						

Step 7. Implementation Branding

Create an integrated consultation brand for the project, if possible, for all your consultations across the department or organization. Create a visual recognition with your community--when residents see the branding, they know you want to hear what they think and include it as part of your research for decision-making.

Choose a project name that is short and void of jargon. Punchy and clever is great but the title should relate to the subject matter.

Select a memorable URL. Around one third of your website traffic will be created through direct URL access. Avoid acronyms or shortened words that irritate your constituents but also avoid something long. Think of clarity--is it pretty obvious by the URL what happens on the site?

Using Scenario, identify a name for the consultation, describe branding and assign the URL:

There is nothing worse than getting through this consultation planning process and then creating a failed project because you ask the wrong questions, or you ask boring questions that no one answers…

See **Engaging Questions for Public Engagement** on BangtheTable.com for examples.

Big Tip: Be clear, open, specific, targeted, spatial, brief, honest, provocative! Dig deeper! Provide context! Demand contemplation! Promote positivity! Empower! Present scenarios! Present options!

The Science and Art of the Well-Structured Question

The only really good reason to ask a question is because you, or someone else, is interested in the answer. In Public Participation process, be sure there is intent to use the answer to make a decision or for some other clearly-identified reason. Once you've decided that there is information legitimately wanted, then begin to pose the question. When you think about how you are going to ask your question, consider how you will be reporting the outcomes. If you need to present a narrow scope of quantifiable response--you may be looking toward closed-ended questions. If you are able to provide a qualitative report, you are able to consider open-ended questions. Each have their purpose.

Big Tip: The choice of wording and response format impacts how participants respond and may influence their attitudes, preferences, priorities and intentions. Closed ended questions are useful to show statistical significance and averages; specific and quantifiable levels of participation.

Demographic Questions

How do questions need to be phrased and formatted to gather the necessary community input? Demographic characteristics can be sensitive for some respondents - only ask what is potentially relevant:

Name and Age	Do you want names or are you allowing anonymity? User name? Email? What will show to public vs. what you know? Many options, consider service groupings or decades if the tool does not have a year of birth filtering option
Gender	What is your gender? Please select one option: Male, Female, Other, please specify: ……..
Address and/or suburb	Options – full address, drop down listing of specific suburbs/towns, enter own postcode, pre-populated Australia Post list … limitations - suburb name may appear in multiple States and could be misread, postcodes often reflect multiple suburbs. Participant entered suburbs and postcodes can be messy to tabulate
Diversity (select all that apply)	Consider inserting a framing sentence before this question. I identify as: Gay, Lesbian, Bisexual, Transgender, Intersex or Queer; A person with a disability; Care taker of a person with a disability; Born outside US, None of the above; Prefer not to say, etc. These are illustrative examples only; the goal with use is to list target populations for your project--did you hear from them?
Living Environment	If you ask about geography--neighborhood or council district, be sure to include a map; household descriptions should be inclusive
Connection to consultation project (select main connection or all that apply)	Full-time resident; Part-time resident; Ratepayer; Visitor or tourist; Business owner; Work here; Lives locally to xxxx; Studies or commutes in this area; Plays here. It can be useful to incorporate skip logic where certain groups of people answer different sets of questions or are exited from the survey
Language spoken at home or place of birth*	English, Other (please state) or provide a list of the most common languages. Participant entered languages or countries can be messy to tabulate
Exclusion criteria	Is there anyone who is not eligible to participate (employees, non-service users, people living outside a geographical area)? How many times can people participate?

Using Scenario, identify target groups and demographic questions to ask:

Step 8. Reporting, Analyzing and Feedback Loop

How will we manage and make sense of the community input? (monitoring, managing and analyzing)

Monitoring to check participation is on track

- Monitor the participation profile (participant characteristics).
- Preview the responses.
- Where submissions are publicly visible (i.e., online discussion forum), moderate the responses in accordance with moderation rules.

Managing and entering the community input

- Where possible, capture input using technology-enabled tools. Consider using Poll Everywhere at community meetings and iPads for surveying in the community
- Collate and manage the paper-based forum submissions (i.e., post-its, posters and feedback forms). Create template documents and a filing/folder system. Enter and save submissions consistently and use identifier codes to track where and when the submissions were captured. Provide these quickly to the public as raw data with details about analysis.
- One of the derailments of process occurs when we try to complete an engagement before we provide any data. Schedule updates and mini-reports.
- Collate permission and consent forms.
- Collate and manage the paper-based survey submissions. Carefully manually enter the data into the same or a clone survey asap. If data entry is being processed outside of the project team, prepare a detailed instruction sheet to minimize unnecessary delays and inconsistencies.
- Create a mock-up of the findings report with illustrative or preliminary findings - for discussion and sign off prior to generating the final report

Big Tip: Set up your data process anticipating that participants will not follow the input format you have designed. Allow for additional input that the community feels is pertinent to the process. Determine how you are going to manage grammar, use of acronyms and other “corrections” in the raw data and publish your plan so that you can refer to it later.

Data analysis

- The more structured the question, the easier it will be to analyze
- Consider generating figures and charts (online consultation platform auto-generated, Microsoft Excel)
- Making sense of large volumes of personalized comments by generating word visualizations, identifying themes by using survey tabs/filters or manually reviewing using Microsoft Word or Excel
- Where full disclosure or transparency is required, consider identifying themes manually and then generating themes with frequency count by using computer-assisted tags
- Select and embed illustrative verbatim quotes to retain richness and a human voice

Interpreting and Communicating the Findings

Data Interpretation, Presentation and Communication

Interpreting and presenting responses to demographic questions – options and decision points

- Profile of participants by engagement tool – raw numbers and/or percentage
- Profile of participants for all engagement tools
- Segmenting participant responses using demographic characteristics (i.e., gender, connection)
- Comparison with American Fact Finder or other Census Bureau or demographics profile
- Acknowledge missing data
- Figure or chart (numbers or percentages) complemented with table (numbers and percentages)
- Consider using all of the same communication sources that you used for information about engagement throughout the process to assure that everyone will have access to reports/findings/recommendations
- It is important to track participants throughout the process so that you can be sure to provide them with your gratitude and the results as well as next steps on the decision-making process.

Step 9: Evaluating, Improvising and Closing the Project

While there are many schools of thought and best practices associated with evaluation, the key is to do it. You know your target audiences and organization. Give those that participate an opportunity to evaluate the process and make sure that staff and others directly involved are given plenty of opportunity to debrief and learn from the experience. Consider question types and be sure to use the type that will produce the data you need for confirmation of process--both what was beneficial and what you might be able to improve in the future.

Participant Evaluation Example: Evaluate Portions of Process Provided

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
The purpose of the activity was clearly explained.	☐	☐	☐	☐	☐
The supports I needed to participate were available (e.g., travel, child care, etc).	☐	☐	☐	☐	☐
I had enough information to contribute to the topic being discussed.	☐	☐	☐	☐	☐
I was able to express my views freely.	☐	☐	☐	☐	☐
I feel that my views were heard.	☐	☐	☐	☐	☐
A wide range of views on the topic were expressed.	☐	☐	☐	☐	☐

Illustrative open-ended question: Please identify at least one improvement we could make for future engagement activities.

- Another option: A couple of basic questions along these lines could be incorporated towards the end of the surveying instrument or forum feedback form to capture participant satisfaction:
- How satisfied are you with the consultation information/process/opportunities to have your say
- Please tell us why you feel…

Key Performance Activities for Community Engagement

Engagement Process

- Process demonstrates the use of existing internal and external intelligence to minimize engagement fatigue
- Monitoring of participation to carefully target engagement activities (by suburb, age group, demographic segmentation/profile) to ensure even coverage of community demographics; particularly those targeted for this consultation
- Goals established for expected level of internal and external stakeholder and community participation
- Participation monitored across all engagement approaches and effectiveness of suite of engagement approaches reviewed to maximize participation within budget and time parameters
- Website and online platform analytics – visits, views, downloads, participation
- Number of forums, sessions, workshops delivered – number of attendees and volume of useful input gathered (quantity and quality)
- Level of staff engagement – attend training, active ambassadors, surveys/input gathered via staff, scribes at community sessions
- Participation level in pop-up activities and competitions
- Where practicable, basic demographic data captured with community input
- Quantity of promotional material/collateral distributed
- Quantity and effectiveness of media releases and advertisements (traditional and social media) – document participation spikes

Engagement Outputs

- Carefully crafted engagement questions generate valuable insights to inform evidence-based decision making
- Delivery of report and snapshots as per agreed timeline
- Presentations to Council or other decision makers as per agreed timeline
- Efficient transformation of consultation data to input for strategy, policy, plan that meets legislative requirements (if applicable)
- Organizational and public endorsement of strategy, policy, plan
- Useable interactive community intelligence available to inform other plans and decisions
- Project delivered within budget and time parameters as agreed
- Findings from Consultation Report made publicly available; preferably in stages
- Project Management Group and/or community satisfaction with process and output

Digital Impact

- Shares and likes: how many shares, mentions, (retweets) or likes are your posts (and tweets) getting?
- Customer engagement: how many of your past or existing customers have connected with you on social media? How many have recommended you on social media or passed on a link to your page?
- Web traffic: what percentage of your web traffic comes from social media sites? (this can be determined via website analytics)
- Search engines: is your website and/or engagement platform showing up higher in search results since starting your social media activities?
- Followers/subscribers: how many people are following or subscribing to your page?
- Email list: if you are gathering email addresses how fast has your list grown? If you are using an engagement database, this will be easy to measure
- YouTube: how many views have each of your videos received?

Step 10: Build Community Capacity Along the Way

Community capacity building is the largest outcome for well-run consultations. Every engagement opportunity and project should be viewed as a mechanism to create an educated cohort in the community-those who participate will know more about the specific subject matter of the project and they will learn process-how decisions are made but they should also learn more about who you are as an organization and gain understanding regarding why you do what you do.

Ask yourselves: Did this consultation bring new participants into the mix-increasing their awareness about issues and management alternatives? Did we close the loop-showing our gratitude to participants and provide updates regarding participation and positions on decisions? Did we deliver information as required to decision makers? Did we build trust and capacity in our community?

There are several key factors in making the most of these opportunities:

Systems vs. Tools:

Returning to the same system or platform for all your consultations will result in muscle memory for the community. Just like the city's website has likely become a "go to" for public information, residents will have a place to go to have their say. At times, you will want to use the shiny, new tool to reach out-you like it and it fits well for your project-that's okay! Find a platform flexible enough to include it.

Managing Community Data and Privacy

Be sure that you share information open and readily about how you are storing data as well as how you will generate reports and to whom/where they will be available. If you collect identifying information, be sure you are storing that in a safe location and that contact information is protected. If you intend to reach back out to participants, be sure they know when and how you will do so and that they are sharing the contact information that they want you to use. Make sure policies are in place that speak to the management of online data and privacy.

Moderation

Just as it is your responsibility to take reasonable precautions to keep participants safe in an in-person setting, particularly in your own facilities, you are also responsible to be sure they are not attacked in a digital environment. Be sure that terms of use for tools or platform reflect organizational and community norms and values about how you treat one another. You should have a built-in mechanism to assure that participants are aware and agree to these so there are no surprises if comments are removed.

Connecting Online and Face-to-Face at Events

We do not live in an “either/or” world-at least not when it comes to interactions and classifications of digital or “in-person” connections, communications and engagement. All of your online consultations should host images, videos and other tools designed to bring in-person experience to the participant. Likewise, all in-person events should host a technology component and serve as a marketing opportunity for additional online engagement. Combining your resources and tools, meeting people where they are and increasing accessibility are overarching goals that serve as an umbrella for your tool and process selection.

Consistency Builds Trust

The concept of one engagement creating and maintaining public trust is fictional. The truth is that to prove dependable and trustworthy, consultations need to be carried out for consistent reasons and in a consistent manner so that trust can be built. Consultations are only a small part of the overall, comprehensive and strategic community engagement strategy that should be deployed. Public input processes alone will also not create a trust relationship with the community. If the only time you interact is to make decisions together or to grab input for someone else to make a decision, your relationship will not grow. Your trust well will not run deep and you will run into a bad process that derails your past success. You must develop a comprehensive community engagement strategy that encompasses good decision making and input gathering components so that when a process does "go bad" then you have a deep well of trust reserves and other opportunities to connect and move forward with the overall relationship while managing the challenging issue and fallout. Authenticity and recognition of failed process is typically appreciated and allows for mutual problem solving to re-set and move forward afterward.