Regional District of Nanaimo

Building *Our Community* Together

Public Engagement Strategy & Toolkit

Public Engagement

Strategy

Introduction

Our communities are constantly changing, and the expectations of our residents are evolving. How people share information, and the opportunities for involvement in decision-making, are changing too. Meaningful public engagement facilitates better conversations between government and residents so we can be responsive to the needs and wants of the people we serve.

What is Public Engagement?

Public engagement, also commonly referred to as public participation, is any process that involves the public in problem-solving or decision-making. It is premised on the belief that residents should have meaningful opportunities to engage in the decisions that affect their communities. It moves past one-way communication and welcomes residents into the decision-making process by ensuring timely information and awareness of opportunities to provide input before decisions are made.

Not all topics require the same level of public engagement. Based on the impact of the decision or change, and the input that is needed to inform the decision, different tools and techniques are considered in each instance.

Why do We Engage?

We engage because, although we have skilled technical experts working across our organization, no one knows the community and its nuances better than the people living and doing business in it every day. When we engage, their input becomes part of the decision-making process, helping elected officials, residents, and staff create communities that are responsive to what the community has indicated as important to them.

When public engagement is meaningful, everyone gains something valuable. Governments benefit from hearing diverse perspectives and understanding the public's interests, concerns, and priorities, and the public gains a greater understanding of roles, responsibilities and requirements. With increased communications, our accountability to residents is enhanced. By providing timely access to quality information, there is less misinformation, and residents feel heard.

What is The International Association of Public Participation (IAP2)?

IAP2 Canada is an association of professionals in the field of public participation who seek to advance and extend the practice of public participation through training, certification, standards, values, and advocacy around the world.

The IAP2 developed a number of tools that have become commonplace amongst local governments. The Core Values and Spectrum of Public Participation assist in establishing clear expectations and defining the level of participation in any public engagement process.

Core Values for the Practice of Public Engagement

1. **Public engagement** is based on the belief that those who are affected by a decision have a right to be involved in the decision-making process.
2. **Public engagement** includes the promise that the public's contribution will influence the decision.
3. **Public engagement** promotes sustainable decisions by recognizing and communicating the needs and interests of all participants, including decision makers.
4. **Public engagement** seeks out and facilitates the involvement of those potentially affected by or interested in a decision.
5. **Public engagement** seeks input from participants in designing how they participate.
6. **Public engagement** provides participants with the information they need to participate in a meaningful way.
7. **Public engagement** communicates to participants how their input affected the decision.

IAP2 Spectrum of Public Participation

IAP2's Spectrum of Public Participation was designed to assist with the selection of the level of participation that defines the public's role in any public participation process. The Spectrum is used internationally, and it is found in public participation plans around the world.

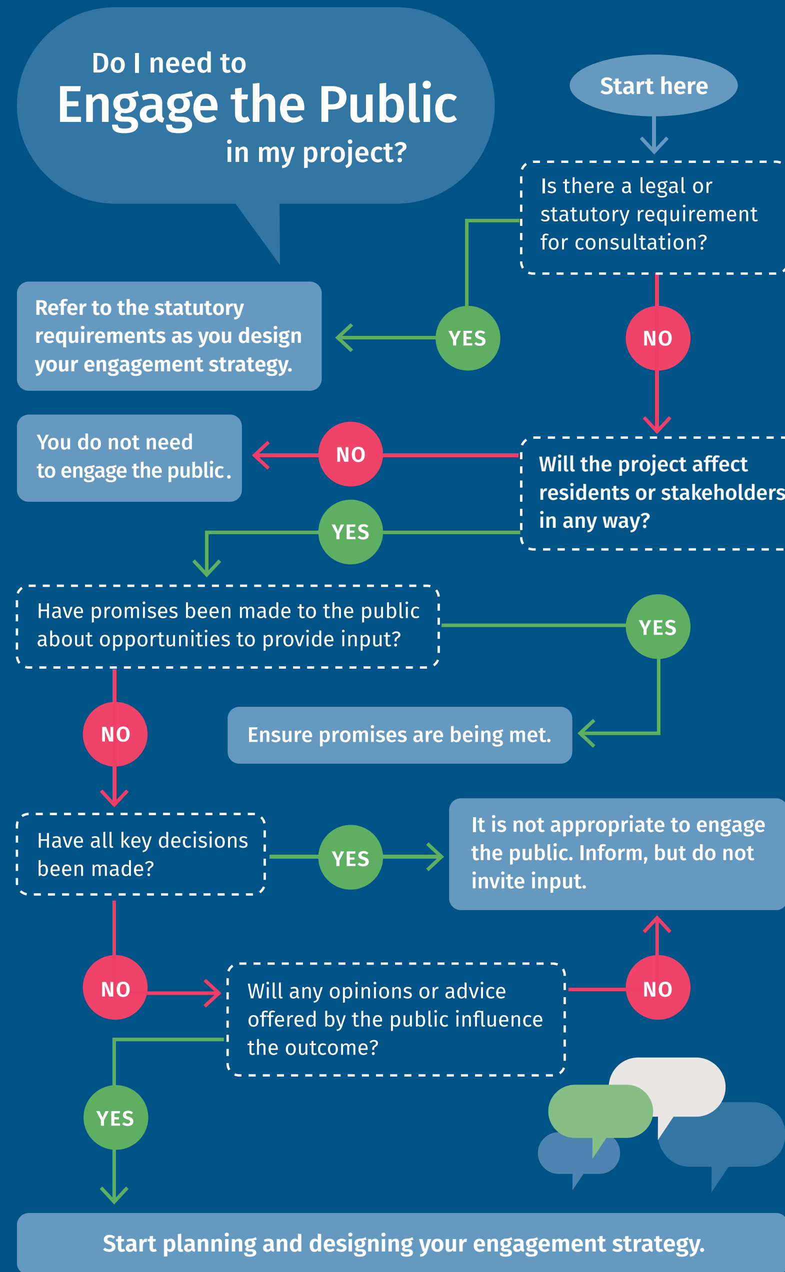
	Inform	Consult	Involve	Collaborate	Empower
Public Participation Goal	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
Promise to the Public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

When Do We Engage?

Whether the public needs to be engaged in a decision should be a critical consideration when developing any new project or considering changes to a service or program. Public engagement may not be required or suitable in every case, but when it is, we want to ensure we are engaging with residents as early as possible. When engagement does not occur or is rushed, there may be negative impacts to the project schedule, costs, and public support. Early dialogue is important in determining when and to what extent public engagement is needed.

In British Columbia, the *Community Charter* and *Local Government Act* outline the minimum requirements for when local governments **must** engage. Generally, these are regarded as the **minimum** requirements and should often be exceeded.

> *Early dialogue is important in determining when and to what extent public engagement is needed.*



How Do We Engage?

1
Plan
- Assess the need for engagement or determine the level of community impact
- Determine engagement objectives
- Identify stakeholders

2
Design
- Determine the strategy
- Choose techniques
- Develop key messages
- Create an engagement plan
- Establish measures and timelines

3
Promote
- Tell your story
- Invite participation

4
Connect
- Execute engagement plan
- Host events/open houses
- Gather input

5
Evaluate
- Evaluate the process

6
Close the Loop
- Report on feedback

Who Do We Serve? A Community Snapshot

Regional District of Nanaimo

First Nations territories:
Snuyneymuxw, Snaw-naw-as and Qualicum First Nations

Size of community (square kilometres): 2,038 km^2

Average household income: $48,469

Ownership vs. rental
Own: 50,930
Rent: 17,900

Language: 99.5% of residents speak and understand the English language

Average education level:
Post-secondary certificate, diploma or degree

3 largest industries
Construction, retail, professional scientific and technical

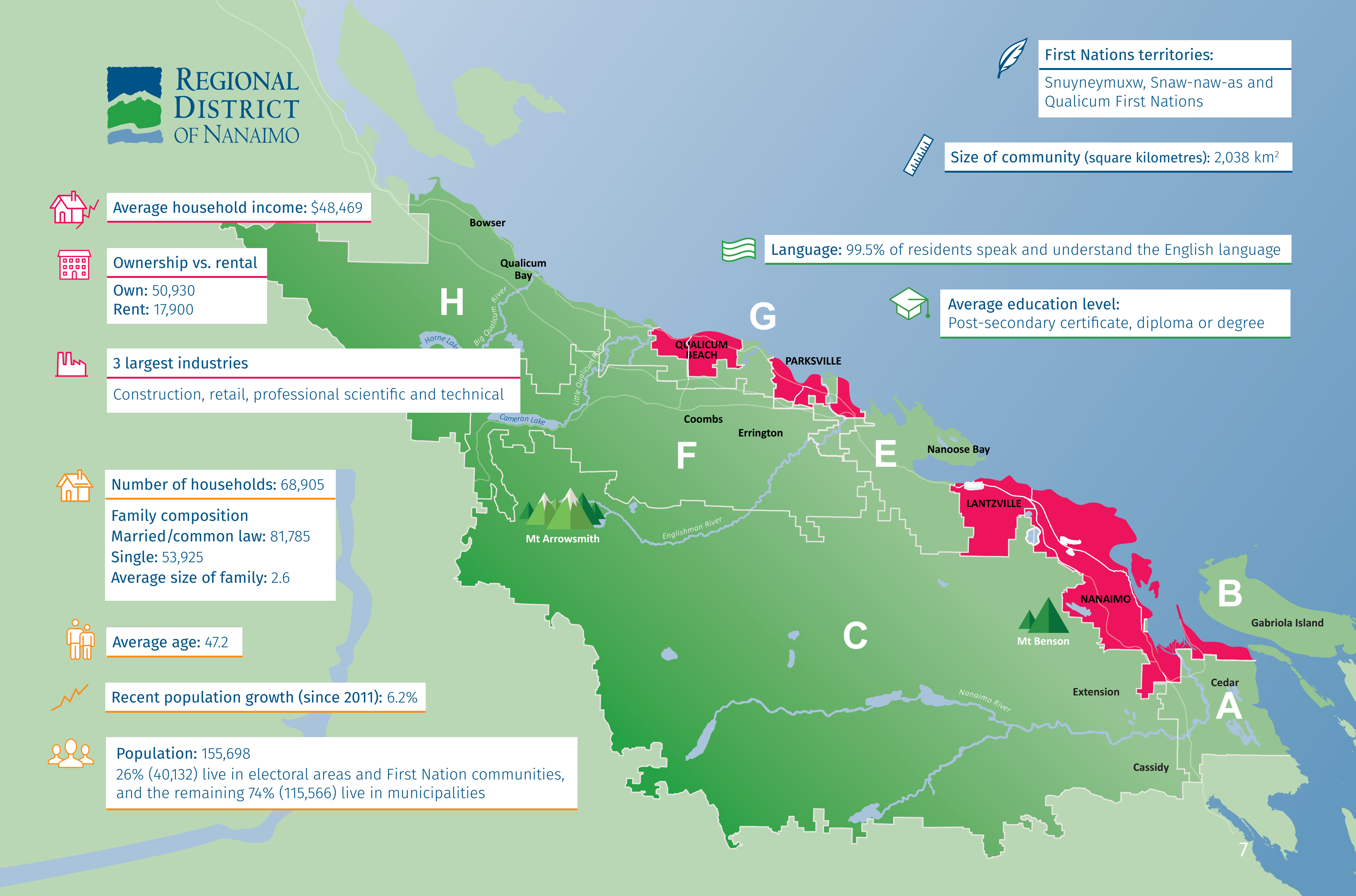
Number of households: 68,905

Family composition
Married/common law: 81,785
Single: 53,925
Average size of family: 2.6

Average age: 47.2

Recent population growth (since 2011): 6.2%

Population: 155,698
26% (40,132) live in electoral areas and First Nation communities, and the remaining 74% (115,566) live in municipalities



Roles And Responsibilities: Who Does What?

Elected Officials

Elected officials are formally responsible for making decisions that represent the interests and values of the community. They have an important role as decision-makers and advocates for public engagement and can contribute in the following ways:

- Represent residents and connect with them to determine top priorities for engagement.
- Prioritize engagement efforts by working with staff to identify areas where public input can make a meaningful difference to decisions and help set public engagement priorities.
- Help promote engagement initiatives and opportunities in order to facilitate a high rate of participation by a wide range of residents.
- Direct residents to the established processes for garnering, monitoring and compiling input, and avoid circumventing these.
- Permit staff to take the lead role in identifying best practices and methods for engaging the public on various issues.
- Consider input gathered from residents and stakeholders when making decisions and clarify the rationale for decisions reached.
- Ensure time and resources are allocated to support successful engagement efforts.

Staff

Staff lead the planning, implementation and reporting back from engagement initiatives. As trained professionals, staff members are responsible for developing and applying professional expertise in the area of public engagement, as well as being technical experts that provide background and advice on decisions being made. Staff responsibilities include the following:

- Work with elected officials to identify where public input can make a meaningful difference to decisions, program development and service delivery.
- Establish channels and processes to clearly identify community priorities for engagement, then ensure that the organization responds.
- Establish and communicate engagement priorities, then apply a consistent set of policies and procedures in designing and implementing engagement activities.
- Consult with elected officials and consider previous public feedback regarding engagement priorities, process design, framing issues, effective communications, and increasing engagement over time.
- Ensure timely and respectful communication with all those who engage, and show how their input has been used to influence decisions, programs and services.
- Engage in ongoing learning and professional development about public engagement best practices.
- Ensure that community input is well documented and that communication efforts are as complete and well-timed as possible.

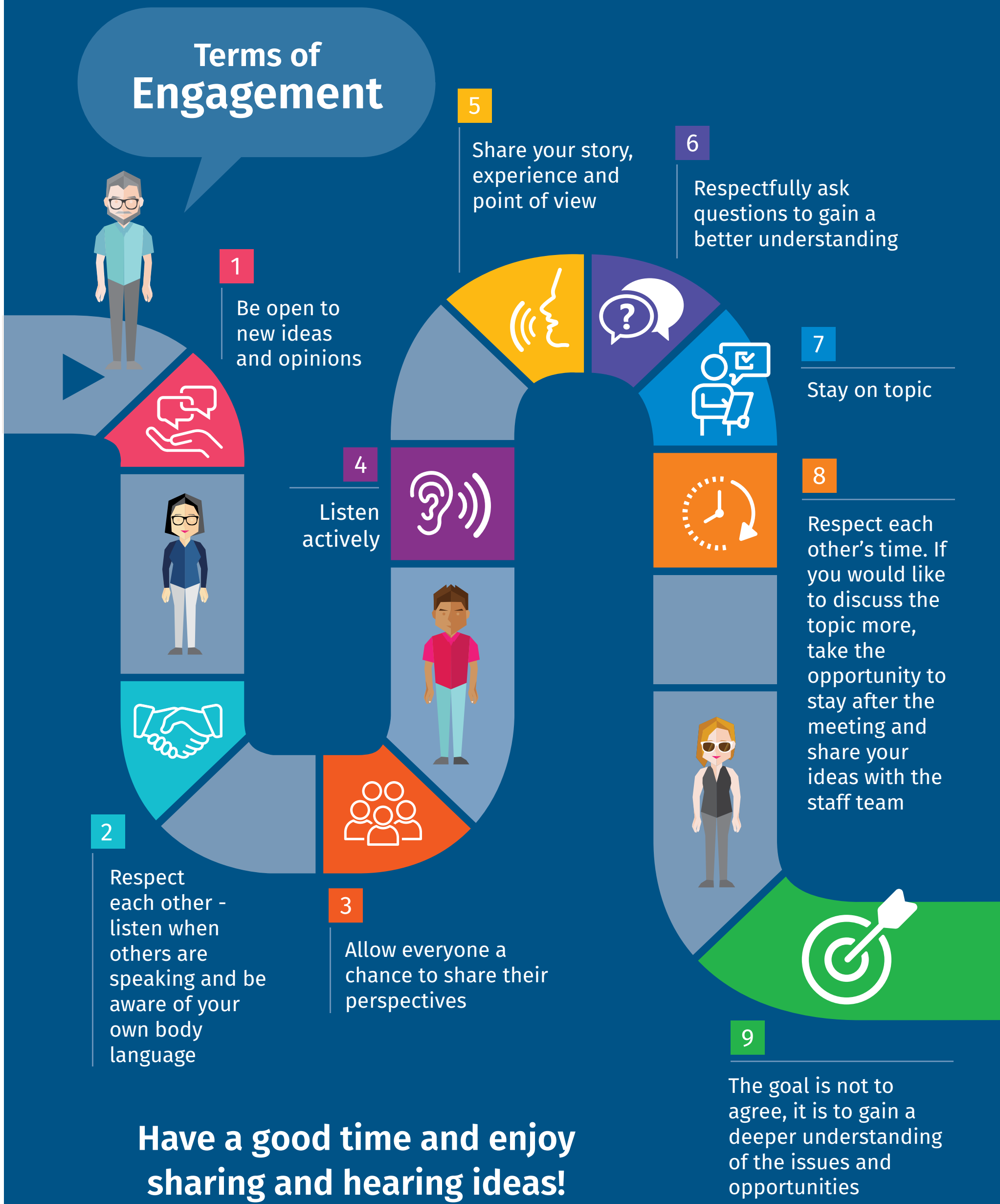
Residents

Residents contribute to informed decision-making and the quality of life in their community by sharing their ideas, experiences, and concerns in a constructive and respectful way. Their contributions can include the following:

- Help identify community needs and priorities.
- Identify barriers to participation.
- Make efforts to stay current and learn more about issues within the community.
- Participate in engagement initiatives and encourage others to participate.
- Express their point of view and contribute ideas while respecting opposing perspectives in a respectful way.
- Be willing to listen to and learn from other community members.
- Vote in local government elections.

First Nations

Consultation and engagement with First Nations communities occurs independently from the engagement of the broader public and requires a customized approach.



Thank You

The Regional District of Nanaimo, Comox Valley Regional District, Cowichan Valley Regional District and the City of Courtenay, would like to acknowledge and extend thanks to the many Canadian communities from which we drew inspiration, ideas, and best practices during the development of this strategy.

We came together as four local governments to develop an engagement strategy and toolkit that establishes a common language and approach to our engagement efforts and provides practical tools for our respective staff and communities to engage in a meaningful way.

Public Engagement

Toolkit

Why is an Engagement Toolkit Important?

An engagement toolkit helps the RDN establish a consistent approach to our public engagement efforts. It helps ensure that our staff and consultants are coordinated and proactive in their engagement approach, providing a more seamless and predictable experience for our residents.

Together with the Cowichan Valley Regional District, the Comox Valley Regional District, and the City of Courtenay, we built a toolkit inspired and informed by best practices, lessons learned across the public sector, and input from staff within each organization. The toolkit includes templates and tools that will help us build organizational capacity for more effective public engagement and foster two-way conversations with our community.

It is important to remember that proper public engagement takes time and dedication. Proper engagement should not be completed off the side of your desk nor be a quick box you check to show you completed a project. It needs to be meaningful, genuine and have purpose.

This toolkit is to help guide you through your engagement planning process. Much of the guide is meant to be helpful information and resources, and the steps that are mandatory are also noted. The Engagement Coordinator is able to assist you in developing your plans, answer questions, and must review and approve your plans in order to ensure the project goals are met. It is important everyone is aware of what steps go into proper public engagement and have the time and budget dedicated to executing the strategies effectively.

Before conducting or developing any public engagement process please review and become familiar with the RDN Board approved Public Engagement Policy.

Planning for Success: How We Engage

A successful public engagement process involves six key steps:

1 Plan
- Assess the need for engagement or determine the level of community impact
- Determine engagement objectives
- Identify stakeholders

2 Design
- Determine the strategy
- Choose techniques
- Develop key messages
- Create an engagement plan
- Establish measures and timelines

3 Promote
- Tell your story
- Invite participation

4 Connect
- Execute engagement plan
- Host events/open houses
- Gather input

5 Evaluate
- Evaluate the process

6 Close the Loop
- Report on feedback

How-To:

Plan

1. Determining Scope*
2. Stakeholder Identification
3. Stakeholder Mapping

Design

4. Engagement Techniques
5. Engagement Tools
6. Removing Barriers
7. Key Messaging
8. Budgeting for Effective Public Engagement
9. Engagement Plan Highlights**

Promote

10. Social Media
11. Writing for The Web
12. Writing Style Guide

* Mandatory for all projects with engagement. Must be completed prior to meeting with the Engagement Coordinator or drafting the Engagement Plan.

** Mandatory for all projects with engagement. Draft shared with and final plan approved by the Engagement Coordinator.

*** Mandatory for all projects with engagement. Final evaluation shared with the Engagement Coordinator.

Connect

13. First Nations Territorial Acknowledgement
14. Event Checklist and Plan
15. Facilitation Tips and Checklist
16. Helpful Event Forms and Templates

Evaluate

17. Participant Post-Event Evaluation
18. Staff Engagement Evaluation***

Close the Loop

19. Engagement Summary Report**

Helpful Links

- RDN Public Engagement Policy
- RDN Communications Policy
- RDN Media Guidelines
- RDN Social Media Guidelines
- RDN Graphic Standards and Logos
- RDN Advertising Templates and Guide
- RDN Communications Sharepoint

1. Determining Scope

MANDATORY COMPLETION OF SCOPE for all projects with engagement. Must be completed prior to meeting with the Engagement Coordinator or drafting the Engagement Plan.

These questions can be used to guide discussions, or to prepare an initial engagement scope. They will then inform the engagement plan template. Answering these questions and determining your scope must be completed before an initial meeting with the Engagement Coordinator prior to the development of a project Engagement Plan.

- **What is the decision to be made?**

- **What is the potential interest each stakeholder will have in the decision?**
- **Which departments need to be aware/involved in the decision-making process?**

- **Who is affected by the decision being made?**

- **What elements of the decision can be informed by public input?**

- Which elements will not be informed by public input?

- What information will those affected or interested need to participate?

- How do these stakeholders typically receive information?

- How do these stakeholders typically like to provide input?

- What risks are involved in involving stakeholders in this decision?
- How much time is needed to facilitate public engagement? (include notification, invitation, events, data analysis, reporting)
- Have we allocated budget for public engagement efforts? (e.g. advertising, venue rental, catering, print and display materials, overtime, consulting fees)
- What other issues or topics could come up?
- Are there opportunities to integrate other questions or issues in the same engagement process?

- **What does “success” or meaningful public engagement look like in the context of this project?**

- **How will we know if we have been successful in attaining meaningful public engagement for this project?**

When thinking about when best to engage, there are certain things to consider:

- Consider how to gain internal commitment early within your department and with senior management
- Look for existing opportunities to engage your audience (e.g. regular meetings)
- Think about times/events where there are many people in one place (e.g. festivals)
- Prioritize your audience’s convenience over your own
- Seek out a representative amongst your selected public and ask them for advice
- Avoid busy times and seasons such as summer vacations, stat holidays, religious holidays, and spring break
- Provide plenty of notice to potential participants (two to three weeks is the minimum public notice required)
- Consider potential conflicts or bridging opportunities with other community events and engagement activities

2. Stakeholder Identification

There are a variety of people or organizations that might be impacted or interested in the decision or project at hand.

It is important to remember that any issue or decision can affect different people in different ways. Anticipating the various people that might be interested or affected helps inform project planning, including stakeholder information needs, and determines which engagement techniques might be considered.

The Engagement Coordinator is an internal stakeholder that is required to be part of the discussions and planning from the beginning of the project. It is important to consider all other internal stakeholders when identifying your stakeholder list and how they may be affected by the project.

- **Who has a direct stake in the decision?**
- **Who may be indirectly impacted?**
- **Who might be impacted that we don't typically hear from?**
- **Who has the influence to enable or inhibit the decision?**
- **Who has influence and access to networks that would enhance the engagement process?**

Stakeholder Identification Checklist

Individuals: *(Examples)*

- Residents (various socioeconomic, geographic locations, gender, age, household compositions)
- Property owners
- Indigenous people – if identified, customized plan needs creating
- Visitors
- Youth
- Seniors
- Persons with disabilities
- Parents of school-aged children
- Pet Owners
- Others:

Business and Economic Groups: *(Examples)*

- Business owners
- Employees and employee groups
- Industry groups
- Business associations
- Development associations
- Chamber of Commerce
- Colleges and universities
- Large employers
- Others:

Government Bodies: *(Examples)*

- School Districts
- Police
- Fire services
- Emergency Management
- Coast Guard
- Ambulance
- Neighbouring municipalities
- Federal Government
- Provincial Government
- Health Agencies
- BC Transit
- Social service providers
- Others:

Advocates: *(Examples)*

- Neighbourhood or Community Associations
- Heritage Groups
- Transportation groups (cycling, accessibility, walking, taxi association)
- Sports and recreation groups
- Sports associations
- Special event organizers
- Arts and culture groups
- Environmental groups
- Others:

Tailoring Your Efforts: Stakeholder Needs

It's important to anticipate the information stakeholders will need and determine how best to engage them in the early stages of the decision-making process.

There are a number of questions that will assist in understanding where stakeholders are starting from:

- **What do they care most about?**
- **What are they most concerned about?**
- **Have they engaged in the past?**

- **What was the stakeholders' engagement experience?**
- **What barriers may exist to their engagement?**
- **How do they like to receive information?**
- **How have they typically provided input or participated in the past?**

The table below outlines an example of how you might anticipate stakeholder needs and corresponding engagement activities for stakeholders to ensure they are aware of opportunities, have the information they need to participate fully, and have activities designed to meet their needs. This can be a useful tool when developing an engagement plan and when reporting back on how specific stakeholders were engaged.

Examples:

Stakeholder	Interests	Desired information	Engagement activities
Neighbourhood Association	√ Land-use √ Changes in neighbourhood √ Costs to taxpayers √ Neighbourhood involvement √ Timing of proposed changes	√ Background reports √ Recent data √ Board decisions √ Visuals of proposed options	√ Website √ Direct invitation to President to participate √ Presentation at upcoming annual general meeting √ Survey to all members √ Workshop √ Booth at a neighbourhood market
Business Owners	√ Economic vitality √ Changes to business district √ Tax rates √ Timing of proposed changes √ Land-use √ Construction impacts	√ Background reports √ Recent data √ Board decisions √ Visuals of proposed options √ Tax impact	√ Website √ In-person visit from key staff to affected businesses √ Presentation to business improvement association or Chamber of Commerce √ Survey to all members
Not-for-Profit Sports Associations	√ Sports facilities √ Rental rates √ Recreational program or policy changes	√ Background reports √ Recent data √ Board decisions √ Visuals of proposed options √ Rate schedules √ Approved policies	√ Website √ Letter to Association Board requesting feedback on proposed changes √ Clear point of contact √ Email channel √ Information for association newsletter √ Survey to members √ Interactive pop-up event at sporting event √ Social media directed at parents of sport teams √ Signage promoting web survey in sporting facilities

3. Stakeholder Mapping

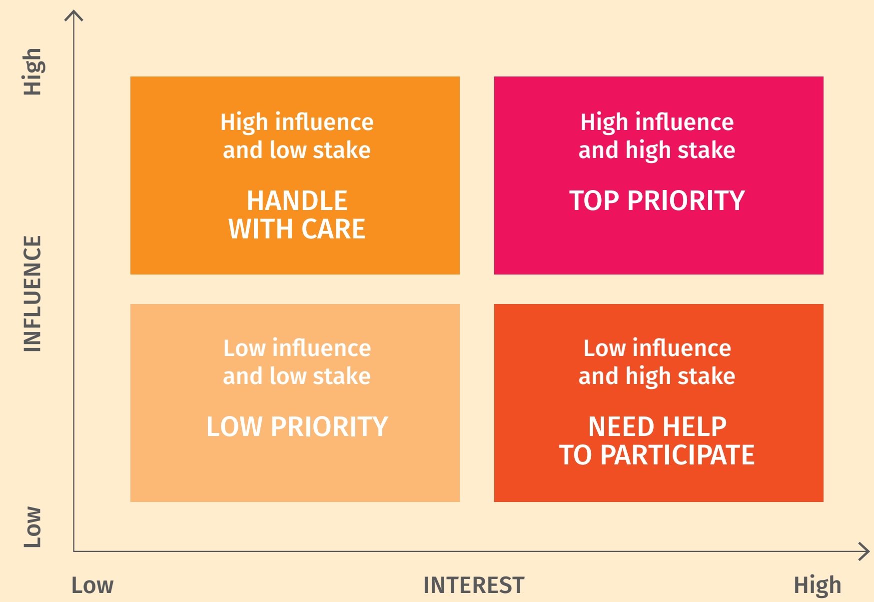
Once you have identified potential stakeholders, it is important to anticipate how stakeholders might be impacted or interested in a decision.

An example of a mapping exercise involves gathering key project staff and identifying stakeholder interests and influence. The placement of stakeholders within the four quadrants will inform strategies tailored to each stakeholder group's needs.

1. **Create** the matrix on a wall or a large piece of paper.
2. **Brainstorm** all the groups who might be involved or interested in your decision or project. Write their names on sticky notes. (One note per name)
3. **Place** the sticky notes on the matrix, considering both their level of influence (low to high) and their likely level of interest (low to high).
4. **Decide** how best to meet the needs of those identified based on their interest and influence

> *When you use the opinions and influence of your most powerful stakeholders, the project will be better equipped for success.*

Stakeholder Mapping Matrix



Source: Consultation Institute

4. Engagement Techniques: Determining the best tool for the job

IAP2 Spectrum of Public Participation

The IAP2 spectrum helps determine the level of engagement a decision or project requires and helps establish clear objectives and commitments for how public input will affect the decision. The spectrum increases the level of engagement from left to right, with increasing expectations of public impact, participation, and costs as you move to the right towards Empower. The tools and techniques are determined by the public participation goal or objective.

	Inform	Consult	Involve	Collaborate	Empower
Public Participation Goal	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
Promise to the Public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.
Example Tools	• Fact sheets • Websites • Open houses	• Public comment • Focus groups • Surveys • Public meetings	• Workshops • Deliberate polling	• Citizen Advisory committees • Consensus building • Participatory decision-making	• Citizen juries • Ballots • Delegated decisions

5. Engagement Tool Samples

Technique	IAP2 Spectrum	Description	Cost
Project website/ web page	Inform	A centralized online location to find information related to the project.	No direct cost to project but requires staff time to ensure it remains current. All public events are to be posted on the RDN website calendar.
Social media • **Facebook** • **Twitter** • **Instagram** • **LinkedIn**	Inform	Social media helps connect information with people. Social media is an immediate way to share information with large numbers of people and provide information that can be easily shared by others. Social media is another way of monitoring public commentary and assessing or responding to misinformation.	No direct cost to project but requires staff time to draft, post and monitor comments. Engagement Coordinator can assist with posting as needed.
Online engagement – Get Involved RDN	Inform Consult Involve	Get Involved RDN is an online engagement tool to be utilized for all engagement projects. It allows for two-way communication opportunities. It's not intended to replace in-person engagement but enhance. The tool helps bring the conversation off social media and onto a platform that provides a more interactive and respectful discussion. The tool also allows for detailed analytics and the use of various tools to gather input.	No direct cost to project but requires staff time to ensure remains current. All public events are to the posted on the Engagement Calendar which is separate from the RDN website calendar. Engagement Coordinator sets up and publishes all new project pages.
Information booths at events	Inform	A display where project information is available and may be interactive to solicit input.	Cost range depending on event scope.
Promotional video	Inform	Short videos suitable for online distribution. They can be used to educate, inform or promote.	Cost ranges from $2000-10,000 depending on the length, style and scope. Connect with the Engagement Coordinator to discuss ideas for video creation and for final approvals.
News release	Inform	Used to inform media of an issue, an event or project.	No direct cost to project but requires staff time to draft and work with the Communications Coordinator for approvals.
Fact sheets, FAQs	Inform	Provide commonly requested information about a particular issue or project, usually 1-2 pages and available online or in print.	Can be done in house if staff have design skills. Can be done by a consultant. Printing and distribution costs vary. Ensuring they are graphically appealing is recommended.
Newsletter	Inform	Community members and stakeholders can sign-up to receive updates and stay informed about projects.	Can be done in house if staff have design skills. Can be done by a consultant. Printing and distribution costs vary. Ensuring they are graphically appealing is recommended.
Presentation	Inform	Organizing frequent and informative presentations throughout the community is an excellent way of building relationships and doing outreach.	No direct cost to project but requires staff time to draft. An RDN presentation template is recommended for use.

Technique	IAP2 Spectrum	Description	Cost
Surveys (telephone, mail-in, online)	Consult	Use to obtain data on opinions, concerns, issues, satisfaction levels.	Online surveys are of no direct cost to the project using the projects Get Involved RDN page. Staff are to design with the Engagement Coordinator. Include promotion costs. Can be done by a consultant. Recommended for telephone survey.
Focus groups	Consult	Small, often representative or specifically selected groups that are facilitated to test ideas or messages and gauge perceptions and opinions.	Cost range depending on scope.
Pop-up booth	Consult	Provide a temporary physical presence and a way to reach your audience directly. They can educate, raise awareness, and create an opportunity for residents to ask questions of staff or provide feedback.	Cost range depending on scope. May include promotion costs.
Open house	Consult	An advertised public event where residents can access materials, plans and exhibits. Staff and technical experts are available to answer questions, and stakeholder feedback can be collected through one-to- one discussion or interactive display boards or stations.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Community meeting	Consult	Special interest meetings with local community groups, business, institutional or industry stakeholders.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Public hearing	Consult	Official meetings where individuals or groups are invited to share their views on an agenda item. Typically, a formal meeting with legislated requirements. Used to satisfy regulatory requirements such as bylaw readings and land-use matters. Dialogue is time-limited, and comments are recorded.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials.
Study circle	Involve	A small, diverse group of 8-12 people who meet for about two hours per week for four to six weeks to address issues in a collaborative way. Led by a central facilitator, people consider the issue from many points of view resulting in strategic actions.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Workshop	Involve	A facilitated meeting or conference to discuss a particular topic. May involve multiple speakers and multiple aspects of the topic and results in recommendations or potential solutions.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Site visit	Involve	Tours of an area or project site led by a project manager or another well informed employee or consultant, for stakeholders, community members, media and elected officials to gain a greater understanding of issues and implications.	Cost range depending on scope. Include transportation costs as needed.

Technique	IAP2 Spectrum	Description	Cost
Design charrettes	**Involve**	Charrettes are designed to encourage the participation of all. They are an intensive planning session where residents, designers and others collaborate on a vision for development. It provides a forum for ideas and offers the unique advantage of giving immediate feedback to the designers. More importantly, it allows everyone who participates to be a mutual author of the plan.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
World cafés	**Involve**	An informal conversational process intended to facilitate open and intimate discussion around a certain topic. Working off predetermined questions, participants change tables during the process and focus on identifying common ground in response to each question.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Deliberative polling	**Involve**	A random, representative sample is first polled on a targeted issue. After this baseline poll, members of the sample are invited to gather at a single place for a day to discuss the issues.	Cost range depending on scope.
Advisory committee	**Collaborate**	A group of stakeholders or representatives of stakeholder groups that provide input on a project or initiative. Requires staff support for terms of reference, selection, meeting agenda and minutes and reporting purposes.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Task force	**Collaborate**	A group of stakeholders or representatives of stakeholder groups with Terms of Reference and a limited timeline that provide input on a specific project or issue. Requires staff support for terms of reference, selection, meeting agenda and minutes and reporting purposes.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Open space meeting	**Collaborate**	A participant led discussion ideal for encouraging participants to gain ownership of an issue and come up with solutions. Participants agree on the areas of discussion that have importance for them, and then take responsibility for facilitating the sessions.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Participatory decision making	**Collaborate**	A large number of stakeholders (residents, staff, experts, etc.) come together to find a common ground or consensus on a solution that will benefit everyone. In a participative decision-making process, each individual has an opportunity to share their perspectives, voice their ideas and tap their skills to improve team effectiveness and efficiency. The group determines the result and it is implemented.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Referendum or Alternative Approval Process (AAP)	**Empower**	The official choice in response to a specific question made by casting a ballot either in favour or opposing question provided.	Cost range depending on scope. Include costs for promoting.
Voting	**Empower**	The official choice made in an election by selecting candidates on a ballot.	Cost range depending on scope. Include costs for promoting.

6. Removing Barriers to Engagement

Inclusive engagement is about building strong and sustainable relationships within your community. One of the key components to making public engagement processes responsive, inclusive, and culturally appropriate is building the capacity of staff to understand the implications of age, gender, race, culture, and socio-economic status on public process.

Effective public engagement takes careful planning and acknowledgement that each population we work with provides a unique opportunity to broaden our understanding of what makes a community.

1. **Build personal relationships with target population**

    Are there key individuals or constituents you already have or should be building a relationship with?

2. **Create a welcoming atmosphere**

    Does your process reflect, honour, and welcome the community?

    Do the venues you choose invite participation and engagement?

    Choose gathering places that are comfortable and that are conducive to the interactions that you want to have

3. **Increase accessibility**

    Is the venue accessible to people with disabilities?

    Is the venue accessible by various modes of transportation (buses, cyclists, pedestrians, etc.)?

    Are there other barriers or issues that should be considered?

    - Language
    - Time of day
    - Childcare
    - Power dynamics between and within community groups
    - Food/environmental allergies

4. Develop alternative methods of engagement

Do you have non-traditional methods of outreach to get people involved?

Do you offer multiple ways for contributing input and feedback?

5. Maintain a presence with the community

Are there community driven events that you can participate in where people will already be gathering?

Are there outside opportunities for you to meet community members and build relationships?

6. Partner with diverse organizations and agencies

Are there organizations that currently have relationships with your target populations that you can connect with (remember to consider power dynamics)?

7. Developing Key Messaging

Consistent and plain language messages are critical to the success of the process. This information is what will help encourage the public to take interest and participate in the decision-making process and will be used to guide media interviews, social media, speaking remarks, and print materials.

Key messages summarize the issues or opportunity and should be:

1. **Clear**: Present the information in plain language and at an easy-to-understand, Grade 6 reading level.
2. **Concise**: Use brief, bulleted lists for quick understanding instead of wordy paragraphs.
3. **Concrete**: Convey factual information in a straightforward manner. Avoid speculation and take care to remove any bias.
4. **Correct**: Fact-check your copy carefully to ensure the information is accurate.
5. **Coherent**: Eliminate wordiness and technical jargon.
6. **Complete**: Check with people in other departments to ensure you have not missed key information.
7. **Courteous**: Be respectful of the time and effort participants are giving. All points of view are valuable.

Key Message Elements

- Develop three to five key messages
- Keep sentences short and create stand-alone sentences - provides less opportunity for the information to be taken out of context
- The basic elements of messaging should include the elements of the 5 W's and H: Who, What, When, Where, Why and How
- Provide context that compels the listener to care or want to learn more
- Reference where the strategic direction or context has come from (e.g. Official Community Plan, Strategic Priorities, Master Plan, Financial Plan etc.)

Key Message Tips

- Use simple words, avoid jargon or buzzwords
- Avoid qualifiers such as "I think," "I believe," "I feel," and "I hope" – makes the speaker sound uncertain
- Use active language, not passive
- Use words that help paint a picture in the listener's mind
- Avoid references to internal terminology such as projects, processes and programs
- Identify a few keys facts or data that support your key messages

Examples

- **Decision/Opportunity**: The regional district is considering options for upgrading a recreation facility and is seeking the public's input to inform their decision. Key messages will summarize the key components of the decision/opportunity, the decision makers, the timeline, and how the public can get involved.
- **Who**: The Regional District of Nanaimo is planning for the future of the Oceanside Arena, the oldest recreation centre in the region.
- **What**: The 80-year-old recreation centre requires significant investment to repair the building and continue to serve the needs of the neighbourhood. The community has grown and changed over the years, so it's important to hear from residents when planning for future investment.
- **When**: The Regional District of Nanaimo Board will decide how to proceed with improvements to the facility as part of the annual budgeting process this fall.
- **Where**: Citizens can learn more and provide input at a number of upcoming open houses and in an online survey at www.getinvolved.rdn.ca
- **Why**: Recreation facilities and programs support the health and well-being of our community. They create safe and affordable spaces to bring the community together. This facility has served generations of families in this neighbourhood, and as the community's needs change, so must the facility's.
- **How**: The RDN Board will have a number of considerations when deciding how to proceed. They will have to consider the condition of the building, overall community needs, affordability, and the input of facility patrons.

8. Budgeting for Effective Public Engagement

It is important to anticipate the costs associated with engaging the public and these should be outlined within the overall project budget. Also, when engagement efforts have not been funded appropriately there is risk to the overall project. Less than adequate engagement can potentially result in higher costs overall if there are delays or additional engagement is required.

Reflecting back to the IAP2 spectrum, the more intensive the engagement towards Empower, often higher the cost. The Engagement Coordinator can help ensure all costs are listed so the department can confirm the budget is appropriate.

Hard Costs	Proposed Budget	Final Costs
Consultants/contractors (if required) ■ Public engagement consultant ■ Communications consultant	$	$
Tools and techniques ■ Public opinion polls/surveys ■ Online surveys ■ Facilitators ■ Focus groups	$	$
Technical requirements ■ Computer analysis ■ AV equipment (podium, screens, speakers, laptop set-up and rental)	$	$
Logistics ■ Venue ■ Refreshments ■ Security/parking attendants ■ Tables and chairs ■ Interpreter (if required) ■ Insurance	$	$

Hard Costs	Proposed Budget	Final Costs
Communications ■ Advertising (print, online and radio) ■ Website development and maintenance ■ Print materials ■ Presentation materials ■ Signage	$	$
Subtotal	$	$
Soft Costs	**Proposed Budget**	**Final Costs**
■ Staff time ■ Special event costs (overtime or call-outs for set-up, deliveries, take down)	$	$
Subtotal	$	$
Other	**Proposed Budget**	**Final Costs**
	$	$
Subtotal	$	$
Total	$	$

9. Engagement Plan Highlights

MANDATORY COMPLETION OF HIGHLIGHTS & PLAN TEMPLATE (see link on following page)
Mandatory for all projects with engagement. Draft shared with and final plan approved by the Engagement Coordinator.

This high level summary is mandatory for all projects that have any level of engagement and will be included in staff reports to the Board. It will also be shared publicly on your project's **Get Involved** RDN page.

- **Engagement Objective**
  - Define the intention behind incorporating public engagement in this project.

- **Decision**
  - Explain the decision to be made and how public engagement will inform that decision.

Promise to the Public

- Describe your commitment to the public and how their input will be used.
- Outline the level of public engagement based on the IAP2 spectrum (there may be different levels for different phases of the project).

Tools and Timeline

- List who is affected by the decision (external stakeholders).
- Outline corresponding tools for reaching stakeholders and seeking their input and timing.

10. Social Media

Social media can be a powerful, efficient, and inexpensive way to inform the community. Through short, visual messages, the public can stay informed about the projects and issues that matter most to them, and they can share the information with their networks.

Tips for posting:

- Be consistent
  - Tone of voice
  - Use interesting, colourful, or clever visuals (video, images or GIFS)
- Focus your messaging
- Determine which hashtags will help reinforce or share your message
- Measure and analyze results through analytics, comments and shares
- Share information that contextualizes or reinforces your messaging

Most departments have a person that has access to make social media posts for their department. If your department does not, the Engagement Coordinator can assist. All social media posting is to be done by scheduling on the social media calendar found on SharePoint.

> *Social media can be a powerful, efficient, and inexpensive way to engage and inform the community.*

11. Writing for the Web

Know who you are writing for before you start. What you're writing should be tailored to your intended audience.

Write the way you speak

- This is a common rule in web writing. The content that you create should be like a conversation between two people. Stuffy language can get in the way.
- One of the easiest ways to write as you talk is with contractions. People talk in contractions — like can't and don't, and using them helps people relate to what you're writing. The important thing to remember, though, is not to overuse them. Only use them when they sound natural.
- Remember to use the active voice. For example, instead of writing, "The bill should be paid by the property owner," we would write, "The property owner pays the bill." It's much simpler and more direct.
- An easy way to tell if you are using the active or passive voice is to add "by zombies" after the verb in the sentence. If the sentence still makes sense after adding "by zombies," it's in the passive voice. If not, it's in the active voice. (GRAMMARLY)

Be short and to the point

- If a headline is longer than 11 words, it's probably too long. Use full names and titles in headlines. Paragraphs should be two to three sentences at most. Aim for a sentence length of 15 to 20 words. For example, "Perhaps more important than firefighting itself in many modern industrial countries is fire prevention," could just be, "Fire prevention is important."
- Brevity can also increase readability and make the site more user-friendly for people using smartphones or tablets.

Write for smaller screens

- The more text, the more scrolling someone does on their smartphone or tablet.

Jargon and government legalese

- We should be writing to the person with the least amount of knowledge on the topic.
- Don't be afraid to say "we" instead of "The Regional District." Instead of "residents" or "applicants," consider saying "you."

Run-on sentences and multiple commas in a sentence

- Use periods where you can to help a reader digest the content.

Words like "may" and "shall"

- When something needs to be done make sure a resident knows by using strong words like "must."

Acronyms

- The website shouldn't require a glossary of terms or a legend for acronyms. Spell out what you're talking about in detail.

Symbols

- While symbols — like "&" and "@" — can shorten your text, it is better to spell out what you're writing. Symbols like these will only confuse your readers, especially those who may be learning English as a second language.

Repetition

- If the full title of person or place has been used already as a first reference on the page, we don't have to repeat that full title. "Mayor Jane Doe" would simply become "the Mayor" down the page.

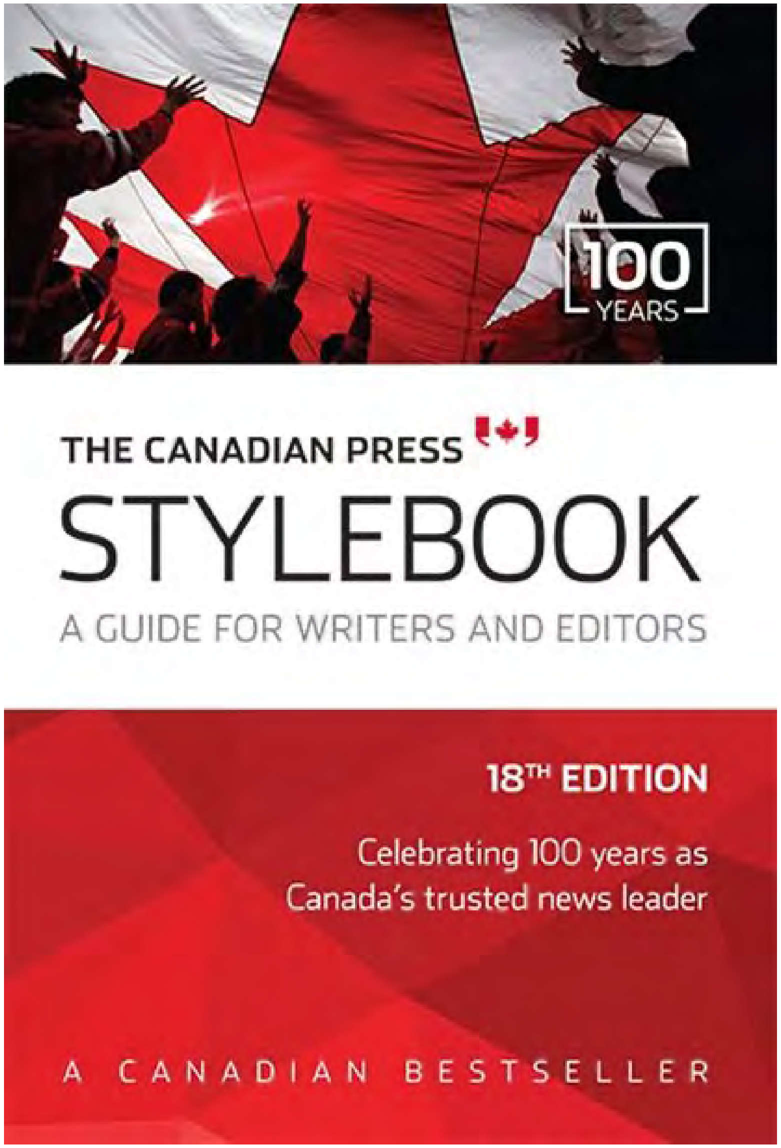
12. Writing Style Guide

We are committed to creating content that empowers, educates, and guides our residents. We can achieve this by making our messaging clear, relevant, interesting, and engaging.

Only experts can make what's difficult look easy, and it's our job to demystify topics and actually educate.

Canadian Press Style Guide

Media and communications materials, including news releases, follow the writing standards outlined in the Canadian Press (CP) Style Guide. The CP Style Guide is updated routinely by the Canadian Press and is followed by media and most public sector agencies to ensure consistent written style and formats.



Connect

13. First Nations Territorial Acknowledgement

Acknowledging the traditional territory or land in which we work is a way to pay respect to First Nations people who were here before the settlers. This practice encourages us to learn more about the people whose lands we live on, and to learn more about our history and relationships. It is also a reminder that we are all responsible for these relationships.

The acknowledgement is the recommended statement to be read at the commencement of RDN hosted events, ceremonies or gatherings, or when sharing formal greetings or remarks. We can also use this acknowledgement any time we come together as colleagues.

> *"I would like to respectfully recognize the Coast Salish Nations whose traditional territory we are on."*

The spirit of the acknowledgment is to give thanks to the people of our traditional territories for hosting us and is an important step towards reconciliation.

When hosting a larger community event or official opening, it may be appropriate to request a local Elder do a welcome to the territory in accordance with protocol.

14. Event Checklist and Plan

Venue & Timing

- Choose a venue that will accommodate more than the number of people you expect
- Choose a venue that is accessible for those with mobility, visual or hearing needs and meets accessibility standards
- Choose a venue that is inclusive of diverse races, cultures, and gender identities
- Consider how the venue supports multiple transportation modes, vehicle and bike parking, and bus routes
- Visit the venue the same time of day as your event is planned to assess the natural light or additional lighting needs
- Consider the acoustics and temperature of room
- Confirm what other events are occurring during the time of your event
  - Will those events attract or detract people from attending?
  - Will those other events create conflict or excess noise?
  - Will there be enough parking for attendees with another event taking place?
- Confirm any audio-visual needs and whether the venue can accommodate them
- Confirm where the washrooms and emergency exits are located
- Confirm who will be on-site during your event and obtain their contact information
- Confirm what time you can access the venue to ensure ample time for setup and take down
- Confirm garbage, recycling, and compost equipment receptacles availability
- Confirm availability of table and chairs – including room setup

Notes on the Venue:

Promotion and Advertising

- Direct invitation to those most affected or interested by email, phone call or letter
- Social media
- Posters
- News release
- Print or online advertising
- Insertion in newsletters

Notes on Promotion:

Supplies

- Sign-in sheets with option to receive future updates
- Clearly marked container for feedback forms, surveys or comment cards
- Nametags for key attendees and staff
- Business cards
- Miscellaneous items: tape, zap straps, scissors, large envelopes, band-aids, paper clips, large clips, elastics, petty cash, etc.
- Attendee counter or “clicker”
- Ball point pens, pencils, permanent markers, colourful markers
- Door signage, sandwich boards or balloons to help attendees find the room
- Easels and flip-chart paper
- Feedback forms/comment cards
- Audi-visual equipment – laptop, projector, speakers, microphone, cords to connect laptop to projector, presentation remote, USB
- Visual aids – posters, maps, PowerPoints, background reports, etc.
- Notice of filming or photography if video or photos are being taken
- Photo release form if planning to publish an identifiable person’s image
- Podium
- Refreshments (coffee/tea, cookies, muffins)
- Large format paper, sticky notes (various colours and sizes), sticky dots
- Table linens
- Tables and chairs
- Venue contact and key contact information
- Water for presenters
- Children’s activities – Lego, books, colouring posters and crayons

Notes on Supplies:

Staff Roles at Events

- Ensure you have included enough staff to help set-up, facilitate and take down the event
- Establish clear roles and responsibilities for the event (set-up, reception, facilitation, assistants, technical experts, media spokesperson etc.)
- Meet prior to event start time to discuss what may occur at the event and ensure staff have a shared level of understanding about key elements of the issues and event – including what happens after the event
- Attendees should be greeted and thanked as they leave
- Take photos of comment boards, flipcharts, or interactive display boards to record visually and to quickly reference what was heard. These photos can also assist with data entry and reporting after the event
- Take photos of the event with identifiable faces hidden from plain view
- Determine who is taking the data (notes, flip charts, etc.) or input from the event and what is being done with it
- Track how many people stop to talk and/or take material; note what questions are commonly asked (this data will be included in the "What We Heard" summary)
- Ensure attendees are aware of next steps and where they can go for more information after the event
- Debrief at the end of the event to share staff perspectives about what was heard, what was surprising, what worked well, what should be done differently in the future

Notes on Staff Roles:

15. Facilitation Tips & Checklist

Meetings or events where stakeholders are brought together to provide input or ask questions about an issue are generally more effective and efficient if they are facilitated, particularly if the issue is controversial. A facilitator manages the meeting, keeps conversations on track and ensures each participant's voice is heard. This tip sheet will provide some information on how to accomplish these tasks.

What is Facilitation? What is the Role of a Facilitator?

The definition of facilitate is "to make easier" or "to help bring about." The role of the facilitator is to help the participants work together by providing and managing the meeting process or structure, while the participants remain focused on the meeting content. The facilitator keeps the process on track and moving forward with all participants engaged, making best use of time and resources.

An effective facilitator quickly establishes and builds trust with the group through honesty and transparency in his/her communication. Facilitators must know what questions to ask, when to ask them, and how to structure questions to get good answers without defensiveness. Facilitators should know how to rephrase or reframe questions and comments, give positive reinforcement, encourage contrasting views, include quieter members of the group, and deal with domineering or hostile participants.

Good Facilitators

- Value people and their ideas
- Think quickly and logically
- Are excellent communicators
- Are active listeners
- Avoid jargon or acronyms
- Speak clearly, at a moderate pace, and at an appropriate volume
- Guide the discussion, but don't lead it
- Raise questions to bring out different viewpoints
- Restate ideas when the person presenting them is not clear

Facilitator's Checklist

Before the Meeting: Prepping your Facilitator or Yourself as the Facilitator

- Know who the meeting participants will be and which community groups will be represented
- Understand the purpose of the meeting and the desired outcome. What will a successful meeting look like?
- Together with the project manager, establish a structure for the meeting and confirm the agenda
- Select and design a process and agenda for the meeting that will help participants to engage effectively and provide the required feedback. Have a plan but be willing to be flexible in response to the situation.
- Set up the meeting space, and ensure that other logistical details have been taken care of
- Provide adequate notice of the meeting, its purpose and agenda to participants

During the Meeting: Facilitator Roles

At the beginning of the meeting, with the group:

- Review the purpose and the expected outcome of the meeting
- Review the ground rules/expectations
- Review the items for discussion and the timeline
- Be very clear about your role as a facilitator. During the meeting, maintain eye contact with participants. Try not to talk too little or too much. You are there to bring out the views and contributions of participants. Stimulate discussion in the group when needed, ask the right questions and provide context for the discussion
- Be sure that everyone is heard and able to participate fully. Know when to draw in those who may not be participating initially, and prevent others from dominating
- Summarize when necessary and build on the contributions of the participants
- Keep the discussion on topic. Be aware of when the group is off topic or confused and when structure may be needed; explain, summarize and help to paraphrase participants' input when necessary; decide when to extend a discussion and when to move the group onto the next topic; remind the group when they are off subject
- Prepare to work through conflicts between participants by creating trust within a "safe space"
- Stick to the pre-determined timeline
- At the end of the meeting, provide closure and reiterate action items/next steps
- Ensure that proper records/minutes are kept (e.g. record of discussion, decisions made, next steps, action items). Ensure accuracy

Ground Rules

Ground rules help meeting participants establish appropriate ways to interact with each other during the meeting and encourage positive group interaction. The rules do not have to be extensive.

Here are some examples:

- Listen to and show respect for the opinion of others
- Follow the agenda—stay on track
- The only stupid question, is the one that isn't asked
- No disruptive side-conversations
- Cell phones off

16. Helpful Event Forms & Templates

Please download and customize to your specific event.

Evaluate

17. Participant Post-Event Feedback Form

1. Have participants fill out the form after the engagement event
2. Collect feedback forms
3. Analyze, report findings, and improve future events

Please download, customize, print and distribute the form to participants.

18. Staff Engagement Evaluation Form

MANDATORY COMPLETION OF FORM for all projects with engagement. Final evaluation shared with the Engagement Coordinator.

1. Debrief with project team and document lessons learned.
2. Send evaluation form to project team.
3. Identify potential alterations for the next event.

Item	What worked well?	What could be improved?
Did we achieve our objectives? ■ Why or why not?		
Diversity ■ Did we engage a wide range of voices? How?		
Inclusion ■ Were all relevant stakeholders identified and included?		
Accessibility ■ Did we ensure barriers to participation were removed? ■ How?		

Item	What worked well?	What could be improved?
Respect ■ Was the process respectful of participants' time and input? ■ How?		
Transparency ■ Were the levels of involvement and influence clearly communicated with participants? ■ Did we report back/commit to report back with results and updates to participants?		
Responsiveness ■ How did the public engagement team respond to participant questions?		
Other ■ Were there any questions or concerns expressed from participants? ■ General overall comments or feedback from participants?		

Event	What worked well?	What could be improved?
Venue ■ Location – easy to access (parking, transit, wheelchair accessible)? ■ Wayfinding – signage, easy to find room? ■ Room – good size, layout, furniture? ■ Registration desk (materials, welcome process)? ■ Refreshments (amount, type)? ■ AV equipment?		
Staffing ■ Appropriate number of staff? ■ Relevant knowledge? ■ Facilitation skills?		
Format & Activities ■ Agenda – good timing and flow? ■ Presentation – length, content? ■ Facilitation – clear instructions, keeping time, managing issues? ■ Activity – comments on the process? Lessons learned? ■ Input gathered – quality feedback and ideas documented?		
Relevancy ■ Were the materials and questions provided meaningful and relevant to participants?		

Close the Loop

Reporting Out on Public Engagement Efforts

The final step in the engagement process is ensuring that the community is aware of what input was collected and how it was used.

Often a “What We Heard” report will be produced that provides an overview of the process undertaken, who participated, what was asked, what was heard and the project’s next steps. The “What We Heard” report demonstrates transparency and documents the efforts undertaken. Once complete, these reports should be available to elected officials, staff, participants and the broader public. Reflect on how you communicated with stakeholders throughout the process and use similar methods for closing the loop on the outcome.

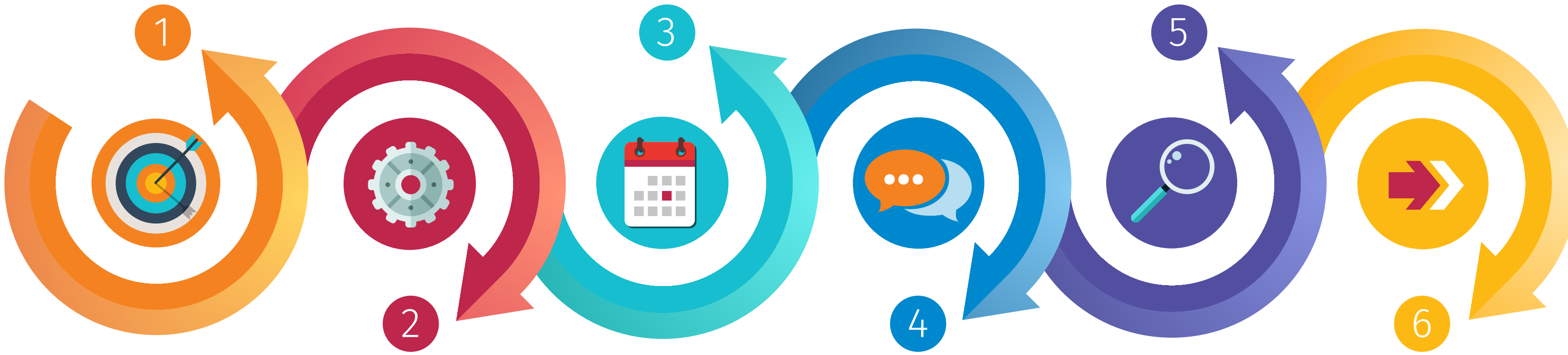
For lengthy projects, or projects with multiple events or phases, there may be several reports produced after each phase or milestone. They can be important building blocks when time passes between phases or can be used as a reminder of what was heard in the past.

Some questions to consider when evaluating your public engagement activities are:

- Did you meet, exceed, or satisfy the goals you had set out at the outset of the planning process?
- Was the issue clearly defined before starting?
- Did the engagement adhere to the core values of public engagement set out in this toolkit?
- Did you include potential participants in the design of your engagement activity?
- Were the appropriate stakeholders identified?
- Did the identified stakeholders participate?
- Were the tools and techniques appropriate?
- Were a variety of techniques used?
- Were there any unforeseen circumstances or constraints?
- Were individuals and stakeholders given adequate opportunity to participate in all aspects of the process?
- Was the engagement inclusive? Did it meet the needs of those with disabilities or language barriers?
- Was the received input relevant and valuable?
- Were all critical issues addressed?
- Did you effectively record and analyze the input received?
- Was the engagement completed within the set budget and timeline?
- Were participants made aware of how the engagement and their feedback could/would be used?
- Did the input inform the decision?
- What went well?
- Were participants generally satisfied with the process?

MANDATORY COMPLETION OF REPORT for all projects with engagement.
Draft shared with and final plan approved by the Engagement Coordinator.

The "What We Heard" report should include:



Project Overview/ Process & Objective for Engagement

- Key background
- Engagement objectives
- Strategic approach or principles applied

Steps to be Undertaken in Overall Process & Associated Timeline

- Engagement opportunities should be identified within the steps

Awareness & Engagement Activities Undertaken

- Describe how events and surveys were promoted – advertisements, social media, news release
- Outline number, dates, and locations of events and surveys
- Include photos of events and images of promotional tools used and/or media coverage

What We Heard

- Include photos of events and images of promotional tools used and/or media coverage
- Theme/Analyze open-ended comments. Review volume, privacy considerations and preferences of decision-makers
- Open-ended comments are included as an appendix for review

Note: Open-ended comments can often unintentionally identify an individual. **A detailed review of all comments must be completed.**

Who We Heard From

- Number of participants, relevant demographics (e.g. renter vs. owner, age, neighbourhood, previous participant, etc.)

Next Steps

- Outline the next steps in the process and how input will be used/was used to inform the decision
- Note upcoming meetings or decision points and associated timeline
- Include web address for where to find additional information

Approved Policy Web Links

- RDN Public Engagement Policy
- RDN Communications Policy
- RDN Media Guidelines
- RDN Social Media Guidelines
- RDN Graphic Standards
- RDN Advertising Templates and Guide
- RDN Logos
- RDN Communications SharePoint