Public Engagement Guidebook

PLANNING & DEVELOPMENT

HALIFAX

Public Engagement Guidebook

Public engagement is a vital component of every project undertaken by the Halifax Regional Municipality. Objective 9.1.1 of the Regional Municipal Planning Strategy (Plan) is to “engage citizens in the development of policies, programs and services as the basis for building healthy, strong and inclusive communities”. The plan further states, “HRM seeks to engage citizens in an ongoing dialogue through education, promotion and public debate on regional and local issues. Participation should be inclusive and accessible to all.” This Public Engagement Guidebook has been created as a tool to help ensure municipal engagement initiatives are developed with these goals in mind.

Every project at the municiaplity is different and has unique engagement needs. The Public Engagement Guidebook is intended to assist staff in developing an approach to engagement for policies, programs and services that reflects the needs of the project and the community it impacts. It provides key steps and considerations for all types of engagements to ensure they are effective, accessible and inclusive. The guidebook also identifies resources available at the municipality to support effective engagement planning, communications and decision making. It is divided into the following steps:

Step One: Assess the need for and purpose of your public engagement process

Step Two: Familiarize yourself with the community

Step Three: Develop an engagement plan

Step Four: Identify barriers to participation

Step Five: Design engagement activities

Step Six: Deliver engagement

Step Seven: Review, analyze and report feedback

Step Eight: Evaluate engagement

STEP ONE: ASSESS THE NEED FOR AND PURPOSE OF YOUR PUBLIC ENGAGEMENT PROCESS

It is important to ensure engagement for your project provides the appropriate level of public engagement, based on legislative requirements, Regional Council direction, the level of impact on the community and the level of influence participants have on the outcome. This allows you to set clear and realistic objectives for your engagement plan.

General project information

Project Title:
What is the decision being made in this project, program or initiative?
Who will make the final decision?

What level of engagement is appropriate?

Are there legislative requirements that require public engagment? If yes, describe:
Is there Regional Council direction for public participation? If yes, describe:
What is the level of impact your project will have? Use the table below to identify if it is low, medium or high.

Level of Impact	Assessment Criteria	Examples
High	• High impact across the municipality, including significant changes to the built form, natural environment or the general health and safety of all residents • High degree of interest across the Halifax region • High impact on a neighborhood area • Strong possibility of conflicting perspectives on the initiative or issues in question	• Regional Council's Strategic Plan • Municipal Planning Strategy/Land Use By-law • Major zoning change proposals or change to land categorization • Removal of a facility or service that serves the entire Halifax region • Major service change • Major transportation initiative
Medium	• Sufficient degree of interest across the municipality to warrant public engagement • High impact on community group(s) or specific facility or service • Moderate possibility for conflicting perspectives	• Development Agreement application • Relocation of youth centre • Proposed changes to a valued activity or program • Proposed improvements to service that is delivered across the Halifax region, such as library services, snow removal or garbage collection • Proposed improvements to customer services • Provision of a community wide event

Level of Impact	Assessment Criteria	Examples
Low	• Low impact on a neighborhood area, community group(s) or specific facility or service • Small change or improvement	• Local street cleaning • Removal of car parking lot • Certain types of infrastructure improvements • Road closures • Fee increases • Changes in service (e.g. changes to a local youth activity program, such as timing or venue/location) • Emergency information

What is the level of influence participants are likely to have on the project outcome?
Use the table below to identify if it is low, medium or high.

DETERMINING FACTORS

		Regional Council Direction	Legislative Requirement	Technical Factors	Budget	Example
INFLUENCE	High	Council direction or desire to have community define policy or outcome	Strong legislative or Regional Council policy requiring engagement	Not many technical constraints/ strong abilities to affect technical constraints	Budget or programs available to implement change	Secondary Plan Amendment
	Medium	Regional Council policy or requirements cannot be changed, but there is some ability to affect the policy or outcome	Moderate legislative or Regional Council policy requirements for engagement	Some technical constraints that limit outcome options	Some ability to adjust budgets or programs to implement change	• Development Agreement • Bike Lanes • Recreation Centre
	Low	Regional Council direction does not allow for ability to influence the policy or outcomes	No legislative or policy direction to engage	Limited ability to affect outcome due to technical standards or constraints	Minimal or no ability to adjust budgets or programming to influence change	• Site Plan Approval • Driveway Location

What is the appropriate level of public participation for your engagement? The level of public participation also depends on the complexity of the project/initiative, timelines and resources and may change throughout a project. Use your results from the previous tables in the matrix below.

IMPACT	High	Inform	Involve/Collaborate	Collaborate/Empower
	Medium	Inform	Consult	Involve/Collaborate
	Low	Inform	Inform/Consult	Inform/Consult
		Low	Medium	High
		INFLUENCE		

Inform: To provide residents with balanced and objective information to assist them in understanding the problem, alternatives and/or solutions. **Consult:** To obtain public feedback on analysis, alternatives and/or decision. **Involve:** To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered. **Collaborate:** To work with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution. **Empower:** To place final decision-making in the hands of the public.

Objectives of the engagement

Describe the overall goal(s) of your project.	
Based on the appropriate level of engagement identified for your project above, answer the following questions up to and including your identified level of public participation to determine the objectives of your engagement.	
Inform *This first step for all public engagement ensures participants have the information required to participate meaningfully.*	What is the information you want participants to understand?
	What do participants need to know to make this effort successful?
	What information is missing?
Consult *Effective when the direction of an issue is constrained by time, budget, technical and/or statutory requirements. There may be an opportunity for residents to influence details.*	What specific types of information are you seeking from participants? (e.g. input to inform decision-making recommendations or service delivery to a community, Regional Council or municipal business unit; feedback on a proposal; general values related to an issue, etc.)
Involve *Requires a more open timeframe.*	What decisions can participants influence?
	How will participants' input be incorporated into the decision-making process?
	How will you design your engagement to involve participants?
Collaborate *Requires more time and/or resources/ budget allocated.*	What specific contributions are you seeking from your participants?
	What authority are you willing to relinquish if necessary?
	What engagement elements are you willing to allow participants to lead or share responsibility for?
Empower *This will usually be driven by Regional Council.*	What specifically do you expect participants to do on their own?

STEP TWO: FAMILIARIZE YOURSELF WITH THE COMMUNITY

To ensure your engagement activities are effective, staff should become familiar with the community that will be impacted by the project. This research step will help you to give careful thought to the best methods to engage the diversity of individuals and groups in the community with whom you will need to consult.

Community Context

Review the following resources: • Relevant Statistics Canada data • Existing plans and reports for the community • Active planning applications and projects in the surrounding area • Stakeholders and community organizations • Identified environmental constraints • Identified heritage resources (e.g. registered heritage properties, heritage conservation districts, cultural landscapes) • Infrastructure and traffic information • Women's Safety Assessments (WSA)
Consider the following questions:
Are there any demographics in the area that must be considered when determining appropriate engagement approaches? (e.g. languages spoken, cultural customs, socioeconomic characteristics, environmental challenges or priorities, historical context, access to technology, level of understanding of the issues being engaged on, responses to previous engagement, etc.)
What are the community resources and assets in the area? (e.g. local residents, local associations, clubs and networks, local institutions, physical assets, etc.)
How should you engage with the community to achieve the broadest and most representative participation? (e.g. open houses, public meetings, online engagement, mailouts, etc.)
What locations and times for meetings/activities would be most appropriate for, and preferred by, those you wish to engage? (See step five "Event Scheduling")
If you are unable to answer any of the questions above or would like additional information about the area you are engaging with, reach out to the Office of Diversity and Inclusion/African Nova Scotian Affairs Integration Office (D&I/ANSAIO) and/or the area's Community Developer for assistance. Planning & Development (P&D) has an embedded Diversity and Inclusion Advisor to assist with these engagements.

Community Needs

Consider whether the following screening conditions necessitate a more robust or targeted level of participation (check all that apply):

☐ The project may disproportionately impact historically underrepresented* and/or underserved communities.

☐ The project or issue could impact spaces, places or objects of cultural heritage significance.

☐ The project or issue is unique/challenging (i.e. it is difficult to understand, will likely have social impacts, may be heavily values-based or may be controversial, politically sensitive and/or have significant financial impacts).

☐ A significant number of people or groups have expressed strong interest and/or opposing opinions about the issue or project.

☐ The project or issue has the potential to impact sensitive government-community relationships as they relate to issues of trust.

** Underrepresented groups include but are not limited to: African Nova Scotian communities, Indigenous communities, persons with disabilities, 2SLGBTQIA+ communities, Francophones/ Acadians, youth, immigrants, women/gender diverse persons, families with children, the older population, rural areas lacking technological infrastructure, renters vs home-owners, individuals living in congregate settings, etc.*

If any of the above conditions apply or you are unsure, contact D&I/ANSAIO to review the appropriateness of your anticipated level of engagement.

Engagement Strategies

D&I/ANSAIO has developed strategies to centre the voices, interests, values and experiences of underrepresented identities and cultural groups in the engagement process. These include:

- Mi’kma’ki Allyship Toolkit
- Accessibility Strategy
- French-Language Services Strategy
- Immigration Strategy

Actively and consistently include diverse community members when planning engagement activities. Many communities have been historically underrepresented in, and excluded from, participation.

Pre-engagement

Pre-engagement may be necessary for applications or projects that require significant or sensitive engagement approaches. Pre-engagement is an opportunity for informal networking, individual introductions and enhanced communication by bringing together resources like D&I/ANSAIO, Community Developers, municipal staff from relevant business units or other stakeholders, to clarify any issues and determine the approach to the forthcoming engagement. Pre-engagement allows you to increase trust between communities and staff, leverage lived experiences, knowledge, networks and connections for guidance on mapping out community assets and resources and to develop a broad and inclusive outreach process. Key issues to consider during pre-engagement include:

- [ ] Identifying community demographics and stakeholders.
- [ ] Identifying any historically underrepresented communities who are impacted by the project and reviewing any dedicated engagement strategies that may exist.
- [ ] Getting a sense of the tone of the meeting, event or other form of communication. Is it friendly, welcoming and informative or full of jargon and difficult to understand?
- [ ] Identifying established organizations in the community who should be personally engaged to help encourage people to attend and/or "host" a meeting or event?
- [ ] Identifying any community sensitivities you should be aware of.
- [ ] Determining appropriate engagement approaches (how many engagement events are needed, optimal dates/ time and platforms/venues to host the events etc.) and actions required.
- [ ] Identifying what physical barriers might prevent community members from participating in engagement opportunities and how best to address them. This will include thinking about the needs of people with disabilities, the needs of seniors and access to public transit.
- [ ] Clarifying the stakeholders' roles and responsibilities in the engagement process.
- [ ] Ensuring that engagement approaches are as culturally appropriate, comprehensive and accessible as possible.

STEP THREE: DEVELOP AN ENGAGEMENT PLAN

Plans for engagement should consider the messaging, goals, audience, methods, timing and resources required for robust public participation.

Key Information

Determine your engagement goals and record the key information you want your audience to know about the program, policy or project. Always keep in mind what you have learned about the communities being engaged. **You should be able to answer the five w's – who, what, when, where and why – information that can be used to answer key questions about the project or initiative. Remember to use accessible language that is:** 1. Clear – Free of jargon, devoid of technical language and relevant 2. Concise – Deliver key messages in 7-8 seconds, it might be all the airtime you get 3. Consistent – Messages must be repeated if they are to sink in **Consider the following questions to help you capture the key information for your project (this messaging can be useful for mailouts, public information meeting, and other presentations):**
How did we get here? *Brief history/evolution of the project to date.*
What is the purpose of the engagement process? *Level of engagement and goal.*
What is the role of the public in the process?
What are the decisions being made/issues being addressed?
What is negotiable? *What the public can influence.*
What is non-negotiable? *What the public cannot influence.*
What are the project phases, decision making milestones and associated timeframes? *This will be developed further later in this step.*
How can the public get involved or be heard?
What happens next and when do we plan to reconnect with the engaged group? *Notice of key milestones/follow up*

Corporate Communications

It is important to reach out to the municipality's Corporate Communications team early in the planning stages for all public engagement opportunities. Corporate Communications will work with you to determine if a communications plan is required for the project or initiative and provide strategic communications and issues management advice. Contacting Corporate Communications early can help prepare the organization for anticipated public or media interest and can also help you leverage the best channels to reach your target audience (e.g. print deadlines for community papers targeting rural audiences can be 4-5 weeks in advance of publishing dates). It is also important to involve the Diversity and Inclusion Advisor for P&D if an engagement is sensitive in nature, or requires outreach to a historically underrepresented population.

Engagement Plan

Project Milestones Complete using Project Milestones table below.	**Engagement Goal** Identify the purpose of the engagement at this stage.	**Target Audience** Complete using Stakeholders identified in the Target Audience table below.	**Engagement Tools** Complete using Engagement Tools table below.	**Date** Meeting date, online platform launch date, etc.	**Resources Required** Staff, facilities, AV equipment, etc.

Project Milestones

Outline the key decision-making points, significant milestones and process towards decision making points and milestones, and your targeted timing for each.	
Project Milestone	**Target Timing**

Target Audience

Complete the table below as necessary with any identified stakeholders for your project. D&I/ANSAIO and/or Community Developers can assist with identifying relevant stakeholders in the area.			
Stakeholder Type	**Stakeholders**	**Representative & Contact Information**	**Engagement Objectives**
General Community (e.g. residents, community members, civic leaders, elected officials, resident associations, elders, etc.)			
Special Interest Groups & Rightsholders (e.g. Indigenous peoples, community groups, environmental organizations, multicultural groups, youth groups, arts/cultural groups, social and health service providers, advocacy groups, sport/recreation groups, etc.)			
Businesses (e.g. developers, business owners, industry groups, chambers of commerce, business associations)			
Government Bodies & Institutions (Mi'kmaw Bands and First Nations people, Government of Canada, Province of Nova Scotia, municipal business units, YMCAs, public and private schools, colleges and universities, etc.)			
Other			

Engagement Tools

Identifying the appropriate tools for your engagement is important to ensure that your engagement goals are met. All engagement should proceed using appropriate and culturally acceptable methods for each of the different stakeholder groups.

Traditional engagement has generally focused on in-person meetings and activities, mailouts and print advertising. However, social media and formal online engagement platforms have become more common and user friendly. Online engagement allows public participation to take place on an ongoing basis with a broader geographic reach. However, before incorporating online engagement, there are several questions below to consider ensuring the approach is equitable and thoughtful.

Engagement plans should generally include multiple (low- and higher-tech) approaches and tools to ensure residents are able to participate, regardless of their ability or comfort attending meetings or accessing online engagement platforms.

Select engagement tools based on your project's identified level of public participation (Inform, Consult, Involve, Collaborate or Empower). The various levels of engagement should not be considered in isolation of the others. Tools from lighter levels of public participation should also be included to support the tools identified for more intense levels of public participation. Additional information regarding specific tools is provided in step five.

**use of tools marked with an asterisk below should be done in consultation with Corporate Communications*

Inform

Online Tools:	Traditional Tools:
☐ Application website	☐ Mailout
☐ Shape Your City page (to house project information, documents, videos, etc.)*	☐ Newspaper ad*
☐ Email (leverage community e-bulletins/ neighbourhood email listservs)	☐ Signage*
☐ Social media*	☐ Displays*
	☐ Information hotlines
	☐ Expert panels
	☐ Site visits

Consult

Online Tools:	Traditional Tools:
☐ Shape Your City page (options include polls, surveys, scales, dropdown choices, Q&As, comment forums, etc.)*	☐ Workshops
☐ Social media discussion*	☐ Interviews
☐ Email commenting	☐ Phone/mail surveys
	☐ Phone/mail commenting
	☐ Open Houses
	☐ Pop Up engagement
	☐ Engagement Storefronts
	☐ Stakeholder meetings
	☐ Public Information Meeting
	☐ Public Hearing

Involve	
Online Tools: ☐ Shape Your City page (options include idea pages, interactive mapping)	**Traditional Tools:** ☐ Crowdsourcing/ideation ☐ Mapping ☐ Design charrettes ☐ Participatory budgeting
Collaborate	
Online Tools: ☐ Document co-creation ☐ Online communities	**Traditional Tools:** ☐ Large group meetings ☐ Working Groups ☐ Advisory Committees
Empower	
Online Tools: ☐ Online voting	**Traditional Tools:** ☐ Decision making platform ☐ Public Participation Committees ☐ Community Indicator Projects

Consider the following questions as you choose your engagement tools:

- Many programs/ projects are built on personal relationships and the trust that comes with being face to face. Are staff in a position to recreate that same experience in an online setting? Is there enough of a trust reservoir to effectively bring these relationships and connections online?
- Online only engagement can create a 'digital divide,' an uneven distribution in the access to, use of, or impact of information for many people who do not have access to e-devices and/or the internet. Be mindful of the Digital Divide 5 'A's of Technology Access:
    1. Availability – To whom is the technology available?
    2. Affordability – To whom is the technology (un)affordable?
    3. Awareness – Who is (un)aware of the technology?
    4. Abilities – Who has the digital literacies to use the technology?
    5. Agency – Who has the self-efficacy to make use of the technology?
- What approaches and outreach will help to ensure all those who need to be engaged can fully participate?
- How can we create opportunities for the people least likely to be heard to participate? For example, equity-deserving individuals and groups who are at greater risk of exclusion include but are not limited to: Indigenous communities; People of African descent; Persons with disabilities; women; racialized groups; 2SLGBTQIA+ and gender diverse communities; temporary residents; immigrants and refugees; persons with low income; youth; seniors; victims of violence; persons who are homeless or under-housed; residents with increased vulnerability to environmental hazards, and development induced displacement.

STEP FOUR: IDENTIFY BARRIERS TO PARTICIPATION

Before finalizing your engagement, review your plan to ensure any barriers to participation are identified and addressed. Barriers to participation can be physical, structural, procedural and/or emotional.

Barriers to Participation

Barriers to participation include anything that prevents a person from fully participating because of their age, language, ability, creed, etc., and may include a physical barrier, an informational or communications barriers, an attitudinal barrier, a technological barrier, cultural barriers, literacy barriers, and mistrust with the government, a policy or a practice. Individual residents, as well as whole communities, may have less experience, confidence, or capacity to participate. As such, it is critical to determine the most effective best practices for inclusive engagement. By anticipating and addressing barriers to participation we begin to ask critical questions and understand how and why persons are excluded and how we can work to foster inclusive and accessible engagement. Consider the following questions to identify any barriers to participation you may have missed:
Are there any barriers or risks that may impede participation in your engagement process?
Is there a history between the organization and the community that you need to consider?

Social Lens Review

Consider the following questions to ensure your Engagement Plan will allow you to deliver a successful engagement process that achieves your goals and reaches all members of the community:

- ☐ Does your communication and outreach approach effectively reach all stakeholder groups and community members, including underrepresented groups (please consult with Corporate Communications and the Diversity and Inclusion Advisor for P&D)?
- ☐ Engagement is easiest when it builds on networks that are already working. What other established organizations in the community can help encourage people to attend and/or "host" a meeting or event?
- ☐ Does your engagement approach allow you to provide information to stakeholder groups and community members in a way that is easy for them to understand?
- ☐ Have you considered tools that will help you to build a positive relationship with the community, including underrepresented groups?
- ☐ Have you considered tools that will help stakeholder groups and community members understand any trade-offs that may be required to achieve project goals?
- ☐ Will conversations continue after the project concludes?
- ☐ Are the resources available (budget, staff time, etc.) to effectively deliver the engagement?

STEP FIVE: DESIGN ENGAGEMENT ACTIVITIES

It is important to carefully design your engagement's correspondence, website, online engagement tools and events. Messaging should be clear and welcoming to ensure it is accessible and will help to build trust and relationships.

Online Engagement

Project Website
The municipality's website, halifax.ca, provides information on municipal operations for residents. It includes pages regarding major projects, programs, initiatives and applications across municipal business units. The website is primarily effective when used at the 'Inform' level public participation. Project websites can be used to communicate the key information identified in step three. Websites can provide a summary of the project and its goals, an outline of past and upcoming work, links to resources and information on how to participate or obtain additional information. Website content should be written in plain language and updated regularly to reflect developments in the project. Share draft content with Corporate Communications, who can provide an editorial review and ensure alignment with the corporate writing and style guide before posting. Contact P&D's Transformation & Innovation team to request an update to a project website.
Social Media
The municipality operates corporate accounts across a number of social media channels (e.g. Facebook, Instagram, Youtube, LinkedIn, etc.) P&D also manages some planning-specific accounts including Halifax Planning on Facebook, @hfxgov and @hfxplanning. These channels can be an effective way to share messages, links and advertisements for upcoming engagement activities. Content can include short messages, images and videos (including some live streaming). For posts on the planning-specific accounts, draft your proposed content and contact P&D's Transformation & Innovation team to refine and post. To inquire about the municipality's corporate social media channels, contact Corporate Communications to determine how social media can be leveraged as part of your overall communications approach.

Shape Your City
Shape Your City Halifax is the municipality’s online engagement website. Shape Your City is a Bang the Table platform that provides a variety of tools to help you achieve your engagement goals. Privacy and moderation settings can be adjusted, based on project requirements. Tools include: **Quick Polls** Staff can ask a question and allow users to select a single answer to that question. Once answered, the results display in place of the poll. **Surveys** Staff can ask a series of questions with different formats. Questions can be formatted to be open responses, scales (including rankings, priority gauges and emojis), and choices (dropdown lists, multiple choice and checkboxes). **Q&As** Users can submit questions about the project for staff to review. Staff can then answer publicly, answer privately or delete the question. **Stories** Staff can create a topic and users submit long-form text responses. Users can then comment on responses that have been posted. **Forums** Staff pose a question or a series of questions to which users can reply in the form of public comments. Comments can be responded to by other users and responses are posted to create a discussion thread. **Ideas** Staff can pose a question for brainstorming or ideation and users can post their solutions as “post-its”. Post-its can be liked or commented on by other users. **Places** Staff can post a map of the project area and users can drop pins within the map and post comments. Shape Your City can be effective for all levels of Public Participation; however, it can generally only efficiently support self-directed, asynchronous engagement. This means that communication between project staff and participants cannot take place in real time. Staff must be sure to respond to feedback and questions through Shape Your City in a timely manner in order to continue to build trust with the community. To initiate a new Shape Your City page, please contact Corporate Communications.

Online Engagement Best Practices:

- Conduct pre-engagement, particularly when working with underrepresented groups or communities, to identify the engagement that works best for their needs.
- Include a combination of self-directed and one-to-one engagement to address a wide variety of barriers to participation.
- Provide multiple opportunities to participate and use both online and traditional methods. Larger projects can benefit from a wide range of tools, while smaller projects may only need one or two. In most instances it will be important to include more traditional methods such as phone and mail to support online tools and ensure access for individuals without computer access.
- When managing large groups, more staff resources may be required in supporting the online conversation and dialogue.
- To create community connections with stakeholders or underrepresented groups, small group formats may help with information sharing and building of trust.
- When creating a schedule for online engagement, consider that time is needed for active participation, as well as compiling information, resharing, and allowing time again for participants to validate this material.
- Moderation support is offered on Shape Your City for some tools to hide comments that are not appropriate.
- Online engagement tools often have embedded tools for accessibility, such as voice to text translation and image descriptions.
- Resources for planning accessible online meetings
    - HRM Best Practices for Accessible Online Engagement
    - Nova Scotia Accessibility Directorate Department of Justice Guide to Planning Accessible Online Meetings and Events

In-Person Engagement

In-person engagement events can take many forms, including:

- Public Information Meetings
- Public Hearings
- Open Houses
- Workshops
- Pop-Up Engagements
- Engagement Storefronts
- Crowdsourcing
- Design Charettes
- Working Groups

The goal of any in-person engagement is to optimize mutual learning. These events can be effective for all levels of public participation and allows for synchronous engagement. This means communication between project staff and participants can happen in real time.

- Resource for planning accessible in-person engagement
- Accessible Events Checklist (in 'Appendix 2 of the Special Event Planning Guide [PDF])

Event Scheduling

When scheduling an engagement event, selecting appropriate locations and timing is vital to its success. Consider:

- What is the best location for the event?

☐ Is it well known in the community?

☐ Is it accessible by walking/public transit?

☐ Is it physically accessible?

☐ Is it in an area generally regarded as "safe"?

☐ For passive consultation events, are members of your target audience likely to be there?

- What is the best date for the event?

☐ Are there any community events/holidays that might conflict with your engagement and prevent residents from attending?

☐ Is your target audience available on weekdays or weekends?

- What is the best time of day for the event?

☐ Will people with jobs outside of the area be able to attend daytime sessions?

☐ Will caregivers/parents be able to attend sessions in the evening?

☐ Will the timing of the event be convenient for people who rely on transit?

Event Set Up
The way you are planning to interact with event attendees will largely inform how you set up your event space. It is recommended project staff arrive well in advance of any event to set up and address any technical issues before members of the public begin to arrive. Consider: • Audience members should have a clear view of any presentation screens and microphones for providing comments should be placed to the side of any space so participants lining up do not disrupt audience views. • If attendees are intended to cycle through the space, station staff to greet attendees and explain the process, as well as at key locations in the room to answer any questions. Ensure seating for members of the public is still provided outside of the intended flow of traffic. • If the meeting room is physically large, make sure an audio system is installed and all participants use the microphones provided. • Plan the meeting space to ensure there is room for participants who use mobility aids to move around freely. • Keep in mind the needs of various participants and their service providers, such as seat allocation nearest to the sign language interpreters for people who are hearing impaired.
Presentations
Presentations are a common and effective way to provide information to attendees and establish a base level of understanding of the project, prior to beginning to have conversations. When planning a presentation: • Use plain language and ensure slides and other materials are clear, to the point and concise. • Speak clearly and at a moderate pace to make the information easier to understand. • Begin the presentation with introductions of key staff, the goals and agenda for the session, background information on the project, and the project's parameters and limitations. • Inform participants of the nearest emergency exits and accessible restroom facilities. • Outline how resident input will be captured and managed and what will be the means of reporting back to the community (e.g. "What We Heard" reports). • Advise participants to minimize interruptions and outline when question and answer periods are scheduled. During question and answer periods, remind people to speak slowly and clearly and state their name before beginning. Thank participants after they finish their remarks and consider summarizing what has been heard from each speaker (verbally, on chart paper, on screen, etc.). Staff can also ask clarifying or follow-up questions to ensure what was heard is accurate. • Manage the speaking time of participants to ensure fair, respectful and time-conscious opportunities for all who wish to participate.

Barriers to Participation
Events must be physically accessible to ensure all residents are able to participate in engagement. Consider: • Venues should be fully accessible (e.g. including building entrances, meeting rooms, washrooms, etc.). • Any materials provided should be high contrast. • Events should be scent free. In addition, when necessary, there are many services that can be provided to help remove barriers that may prevent residents from attending, including: • Child care at the event • Transportation to the event • Food and beverages • Translation/captioning services • Attendant care workers

Barriers to Participation
In-Person Engagement Best Practices: • For longer meetings, include regular health breaks in the agenda and identify when they will be taking place at the beginning of the meeting. • Provide a feedback mechanism, such as an e-mail address or phone number, to all participants at the start of the meeting or in the meeting materials. • Ensure that municipal staff are easy to identify at events and are visually distinguishable from applicants, consultants (e.g. using name tags or municipal lanyards). • Consider the use of a facilitator, who is external to the organization but connected to the community, to help design a group process and manage the meeting. This is especially important if an interactive component is designed to encourage dialogue among attendees, or between staff and the public. Recognize the importance of their contribution as experts and compensate them accordingly. • Consider community-led collaboration opportunities whereby community representatives are provided the opportunity to both collaborate in the planning process and share in the presenting of components of the strategy, such as information and question/answer sessions, etc. This is especially important for in-person engagement and/or forums where expected levels of impact, participant influence, and participation fall into the medium/high categories under step one.

Committee Engagement

Committee Type	Benefits	Drawbacks
Planning Advisory Committee (PACs) Comprised of residents selected by Regional Council to represent their communities who are afforded the opportunity to comment on and provide recommendations directly to Regional Council regarding planning applications and matters. Members are appointed for a select term and meet monthly.	• Community feedback is provided by individuals who are versed in municipal processes and policies. • Members of the public provide comments that are directly referenced in reports and Regional Council discussion. • Councillors who sit on PACs have the opportunity to see projects early in the process and how it does or does not evolve based on community input.	• The addition of another formal meeting further lengthens the planning application process. • Experience in the fields of planning, development or architecture are not required for committee members. As a result, the input provided is as residents, not experts.
Public Participation Committees Comprised of residents and stakeholders formed to provide input on and guide the development of a specific planning project, policy or application.	• Committees can often create a sense of ownership of the project by the community, increasing buy-in.	• Work done by these committees may duplicate input provided by the public through other engagement tools. • A lack of background in planning and development can result in a steep learning curve for members.
Design Review Committee Comprised of a group of professionals with experience in the development industry who review applications and policies related to Site Plan Approval.	• Staff and Regional Council can draw from the experience of other experts in the development field to add value to planning projects.	• Committee members who work in the private sector may be hesitant to critique the work of other professionals.
Advisory Committees Comprised of residents selected by Regional Council who represent various interests to review and provide advice to staff and Regional Council.	• Staff and Regional Council can draw from the experience of members of the committees who have specific interests impacts by the project, policy or application.	• A lack of background in planning and development can result in a steep learning curve for members. • The addition of another formal meeting further lengthens the planning application process.

STEP SIX: DELIVER ENGAGEMENT

While carrying out your project's engagement plan, you should continue to be mindful of its effectiveness and make changes if required. It is also important to communicate with stakeholders on an ongoing basis to develop a successful relationship with the community.

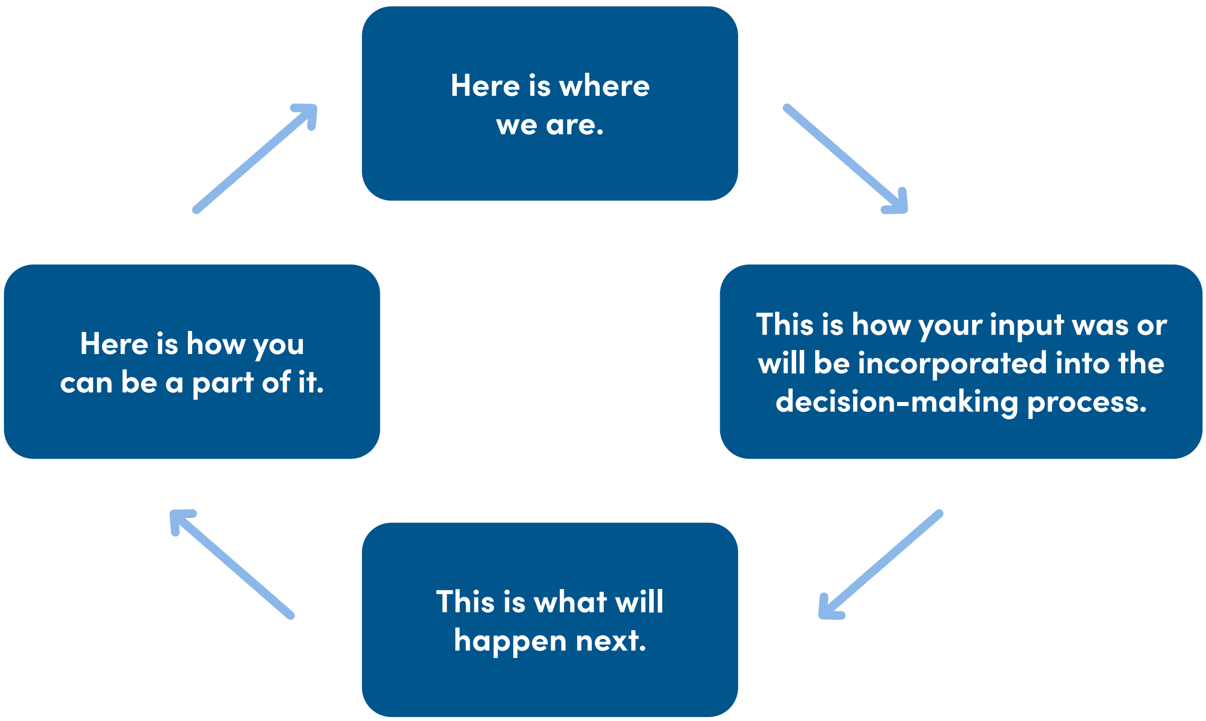
Monitoring Engagement

While completing your engagement consider the following:

- The goal of all engagement activities is to provide participants with a welcoming, accessible and inclusive experience that is effective in its delivery.
- To build trust, centre marginalized voices:
    - Recognize the privileges of people in the organizing group
    - Understand the level of trust with the organizing group
    - Begin with listening to issues of importance to communities you hope to work with
    - Are there existing initiatives led by those communities that you can support, if they want your support?
    - Clearly define and communicate and revisit often the roles and engagement approach
    - Consult with impacted people regarding photos, images, or language used in communications
    - Support volunteer leadership with honorariums
    - Understand and plan for target participants' access to hardware and internet
    - Understand participants level of comfort engaging online (with prevalence of anonymous/bigoted comments)
    - Take the time to invest in relationship-building. Move at the speed of trust.
    - Consider impact of data privacy
    - Find solutions to increase computer/internet access
- Engagement activities should be monitored to ensure they are reflective of the key questions and considerations identified in steps one to five.
- If the scope of the project or level of community impact changes, the engagement plan may need to be reviewed.
- Ensure the environment is welcoming to participants who may be reluctant to share their views.
- Resources for facilitating meetings include:
    - Engaging Questions for Public Engagement
    - Accessibility Guidelines for Organizers and Facilitators
    - Facilitating Public Issues Best Practices
    - Facilitation for Healthy Communities Toolkit
    - Diversity Through Inclusive Practices Toolkit
    - 100 Great Community Engagement Ideas

Project Updates

In order to maintain a relationship with the community, you should keep the community up to date on the process and progress of the project's development throughout. Provide information about opportunities for further consultation and participation using a public engagement feedback loop. It is important that these updates take place in a timely manner. Outline a timeline of next steps that reflect the results from the engagement activities. Participants should also be made aware of how their feedback may influence and direct the future of the project. A public engagement feedback loop should include information on the following:



Depending on the nature of your project, updates can be communicated via:

- ☐ Project website updates (e.g. important dates, amendments to proposals, project materials, engagement materials, decisions at milestones)
- ☐ Mail/email lists (e.g. important dates, amendments to proposals, project materials, engagement materials, decisions at milestones)
- ☐ Public Meetings (amendments to proposals)
- ☐ Stakeholder Meetings (amendments to proposals, new information/issues, decisions at milestones)

STEP SEVEN: **REVIEW, ANALYZE AND REPORT FEEDBACK**

In order to ensure all the feedback from your engagement is considered, it is important to keep organized records of the comments received and how they have been addressed. This helps to ensure your process is transparent and supports stronger relationships with the community.

Comment Management

Logging the public's comments, concerns and requests, including your responses, will allow you to fully consider all feedback you received in the recommendations for your policy, project or program. It also allows you to provide increased transparency related to your decision making by allowing you to demonstrate how each comment was considered and addressed.

The table below includes some information to consider gathering over the course of your engagement. The types of information gathered can be altered or expanded, depending on the project.

Date	Source	Commenter Name/ Contact Information	Organization Represented	Summary of Comment	Comment Category	Result
Date that the comment was received. This allows you to monitor at what point in the project you received the comments and your response time.	**Engagement event, Shape Your City, email, phone, etc.** This allows you to identify which activities successfully generated public participation.	**Name and contact information of the commenter (if available).** This allows for follow up if required and should follow Access & Privacy requirements.	**Name of the organization or group the commenter is representing (if applicable).** This allows you to group comments from the same source together for consideration.	**Summary of the main points raised and link to full correspondence (if available).** This allows you to consider each of the main comments, concerns and requests being brought forward.	**Any common themes or categories.** This allows you to better organize comments as you evaluate them.	**The impact the comment had on the project, policy or program OR reasons that the comment was not able to be acted on.** This allows you to track your decision making so that it can be defended as the project moves forward.

What We Heard Reports

The creation of a 'What We Heard' report is an effective way to summarize the feedback received through engagement. Furthermore, when these documents are published, the public has an opportunity to review and validate the report's findings or bring forward concerns that may not have been addressed. **While the format of a What We Heard Report can vary from project to project, they generally include the following sections:**	
What We Did	This section provides an overview of the project and a summary of the engagement activities that have taken place. This summary should include details like dates, engagement tools, venues, number of participants, etc.
Who Was Involved	This section provides a summary of the participants and stakeholders that took part in engagement activities and the correspondence received. This section can also serve as an important opportunity to identify any groups that may have been missed by the engagement.
Results/Discussion	This section identifies the topics identified by participants during engagement activities and how they have been or will be addressed. This section may be organized based on the key themes from across the engagement, feedback received during each engagement activity, etc.
Implications	This section summarizes the feedback and outlines next steps for the project.

Social Lens Review

Consider the following questions to ensure your findings are reflective of and sensitive to all members of the community:

- ☐ How will the proposed policy, project or program decision affect underrepresented groups?
- ☐ Are the insights from groups who face systemic barriers and inequities reflected in the report, recommendations and outcomes?
- ☐ Does the policy, project or program decision worsen or ignore existing disparities?
- ☐ Based on the above responses, are revisions needed?
- ☐ Did you receive any comments or concerns that should be forwarded to other departments for response, consideration/action?

STEP EIGHT: EVALUATE ENGAGEMENT

By evaluating the success of your engagement activities, you will be able to identify any issues that may need to be addressed in your project and inform future municipal engagements.

Engagement Surveys

P&D's Transformation & Innovation team has created a short survey staff are encouraged to provide at all public engagement sessions. This survey asks for feedback regarding the convenience of the event timing, clarity of the information provided, availability of opportunities to ask questions and suitability of the format. The survey also requests high level demographic information about the attendee.

If you are planning to have participants complete project specific surveys, or do not feel handing out the engagement surveys will be viable or appropriate at your event, Transformation & Innovation has also created a Public Engagement Tracking Sheet which planners are asked to complete following the engagement session to allow them to collect engagement statistics for the municipality.

The survey and tracking sheet are available on the intranet. They will be used to monitor the number of events hosted by the municipality and the number of people who attended. The feedback is also used to inform plans for future engagements.

For more information, contact Transformation & Innovation.

Evaluation Table

Consider the indicators below to assist in the evaluation of your engagement program:

Principle	Qualitative Indicators	Quantitative Indicators
Inclusive Participation	☐ All groups affected by the project have been involved in the engagement ☐ There were no barriers to participating in the engagement process ☐ Impact of participant input has been communicated to the public	☐ Number of people participating in each engagement activity ☐ Number of stakeholder groups participating in engagement ☐ Number of website visits ☐ Number of emails/phone calls received ☐ Observational feedback from project staff, attendees and stakeholders ☐ Transformation & Innovation survey demographic info ☐ What We Heard Report

Balanced and Complete Information	☐ The form of engagement and the information provided was reflective of the appropriate level of participation identified in step two ☐ Information provided was balanced and relevant ☐ Project information and criteria used by decision makers is available to the public ☐ Information about how public input was used is available to the public	☐ Surveys regarding public understanding of the project ☐ Observational feedback from project staff and attendees ☐ Count of references to municipal sources in public correspondence ☐ Accurate media coverage of the engagement process ☐ What We Heard Report ☐ Social Media reporting, where applicable (consult Corporate Communications)
Effective Process	☐ Engagement plan used methods that met the established engagement goals ☐ Engagement plan offered multiple opportunities and venues in which to be heard	☐ Surveys/participant feedback regarding public access to the engagement ☐ Number of people participating in each engagement activity ☐ Number of stakeholder groups participating in engagement ☐ Number of website visits/time spent on site ☐ Number of emails/phone calls received ☐ Observational feedback from project staff ☐ What We Heard Report
Capacity Building	☐ Increase in experience and knowledge regarding the engagement process by residents ☐ Development in the relationship between the community and the municipality ☐ Identification of lessons learned	☐ Surveys/participant feedback regarding public experience with the engagement process ☐ Number of new contacts identified for future engagements ☐ Number of follow up meetings/ conversations planned

<table>
<tr><td>Resources</td><td>☐ Engagement activities has appropriate staffing levels, venue locations, AV support, online tools, budget, etc.</td><td>☐ Surveys regarding public access to and experience with the engagement process

☐ Resources used</td></tr>
<tr><td colspan="3">You can also conduct a debrief with your project team to reflect on the project and lessons learned. Questions to discuss include:

Did we get the participation we had hoped for?

Did the engagement reach interested people and ask the right questions?

Did participants understand the process and their role in it?

Did participants understand the impact their participation had on recommendations and/or decisions?

Was the process timely and effective?

Did the chosen engagement levels and techniques accommodate the needs of participants? Was the process accessible, inclusive and flexible?

Did we get the information we were seeking for the decision makers to make an informed decision?</td></tr>
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