2021

PUBLIC ENGAGEMENT TOOLKIT

DISTRICT OF OAK BAY

IDENTIFYING STAKEHOLDERS

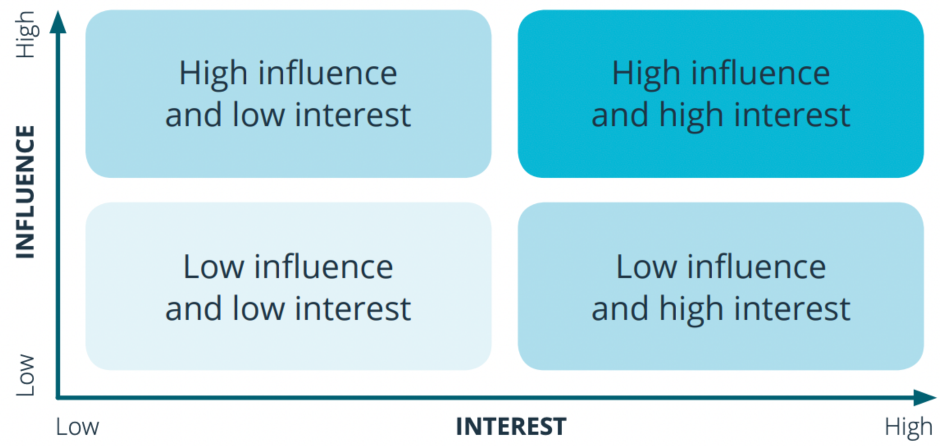
Every decision has impacts. Whether it is increased costs, new traffic patterns, construction impacts, levels of service, or a change in the way a property is used in a neighbourhood. Anticipating who may be interested and affected by the decision is an important planning consideration to ensure their information needs are met and that they are either aware of the change or aware of their opportunity to provide input prior to a decision being made. There are a variety of people or organizations that might be impacted or interested in your decision. This list helps identify potential stakeholders and will then help guide how best to communicate and engage within the community:

First Nations	Property Owners	Community Groups and Associations
Citizens	School District	Mayor and Council
Oak Bay BIA	Cultural Groups	Post-Secondary Institutions
Fire	Health Authority	Persons with Disabilities
Police	Advisory Bodies	Business Owners
Seniors	Developers	Environmental Groups
Media	Emergency Management	Provincial Government
BC Transit	Sports Groups	Transportation Groups
Ambulance	Service Agencies	Federal Government
Youth	Student Associations	Neighbouring Municipalities

STAKEHOLDER MAPPING

Once you have identified potential stakeholders or interests, it's important to understand how stakeholders might be impacted or interested in a decision. This helps guide the level of engagement and how to tailor it to the needs of specific groups or interests.

STAKEHOLDER MAPPING MATRIX



STAKEHOLDER MAPPING EXERCISE

This exercise is best done as a group as it benefits from the wisdom and perspective of multiple people.

1. Create the matrix noted above on a wall or a large table-top 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 stickies on the matrix, considering both their level of influence (low to high) and their likely level of interest (low or high).
4. Decide how best to meet the needs of those identified based on their interest and influence.

DEVELOPING KEY MESSAGES

Consistent and plain language messages about a potential decision or public engagement process is critical to the success of the project or initiative. This information is what will help encourage the public to take interest and participate in the decision-making process. Key messages summarize the issues or opportunities and should be “clear, concise, complete, and correct” so that anyone can understand. This information should be used to guide media interviews, social media, speaking remarks, and print materials.

KEY MESSAGE ELEMENTS

- Develop a small number (ideally 3) of key messages and their supporting points
- Keep sentences short and create stand-alone sentences
- 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

TIPS FOR DEVELOPING KEY MESSAGES

- Use simple words, avoid jargon or buzzwords
- Avoid qualifiers such as “I think,” “I believe,” “I feel,” and “I hope”
- Use active language, not passive
- Use words that help paint a picture in the listener’s mind
- Avoid references to internal terminology or acronyms.

BEST PRACTICES FOR COMMUNICATIONS AND PUBLIC ENGAGEMENT

The following identifies best practices to improve District communications and ensure that it serves as a foundation for success in public engagement efforts.

1. PROVIDE QUALITY INFORMATION

- ***Be a facilitator of information, not a gatekeeper.*** An open government philosophy makes it easier to engage with a local government. Easy access to information and transparency of process facilitates trust. Open data and open government commitments reinforce public participation values.
- ***Ensure proper context is shared.*** Provide the needed context for both issues and decisions. Ensure that there is a shared understanding of how participation works in the District for each process. Ensure that accurate data, background, and considerations have been produced for people to be aware of issues, or to engage further. Anticipate their interests and informational needs to meaningfully engage the matter at hand.
- ***Keep it real.*** Engaging content is necessary to making information interesting and make people care. Use plain language and convey ideas in real terms that anyone can understand. Use consistent language throughout a given process, and across multiple processes. Avoid jargon and minimize the use of “process language” (like plans, policies, projects and strategies). Use language that people can relate to, understand and visualize (like parks, shops, jobs, and other community features).
- ***Be human.*** Demonstrate through language, photos and video used that the District is a people-centred organization. This is also helpful for recruitment and recognition purposes.

2. ENSURE

- ***Create an organizational vision and values that welcome public participation.*** Introduce organizational principles and values for guiding communications and public participation goals and activities. Clearly outline what decisions need to be made, and how public input will be used in the decision-making.
- ***Create communication checklists and tools*** to guide consistent public information sharing and practice across all departments.
- ***Ensure project charters include components and resources to inform/involve public (i.e., key messages, tools, timelines).*** Anticipate public needs at outset of project plan, and identify other considerations or opportunities related to other projects or agencies. Plan adequate time for public engagement to occur and to be effective.
- ***Prioritize communications and engagement efforts based on greatest needs and impacts.*** Create a contacts database and share what is heard broadly (internally and externally).
- ***Create an annual communications calendar*** for the organization that outlines seasonal and routine activities of the District to guide work plans. (e.g. Holiday closures, property tax dates, tax sales, dog and business license renewal dates, annual pool closures, watering restrictions, inclement weather, leaf collection, annual report, budget, etc.).
- ***Establish a staff structure and policy framework*** that is clear and understood in terms of responsibilities. Create organizational policies for traditional media and social media, scripts for phone and email interaction, visual identity guidelines and writing style guides, and public engagement philosophy.
- ***Develop corporate standards and guidelines*** to inform tools and approaches.

3. OFFER MULTIPLE TOOLS AND CHANNELS

- ***Provide choices.*** Provide residents with choices for how to engage with the District. No one tool will reach all demographics and multiple communications channels provide more access and options for awareness, education, and input. Ensure online mediums are current, complete and designed based on what works for the customer.
- ***Provide plenty of notice and do so through multiple channels.*** Provide plenty of notice and time for the public to participate. Recognize the limited volunteer capacity of many organizations, and the busy lives of residents and businesses impacted by decisions and services.
- ***Maximize time and effort.*** Coordinate the District's outreach efforts to maximize public input and community energy. Prioritize public engagement efforts on the decisions and issues foundational to the community and continue to reference the input gathered.
- ***Focus on the basics.*** Ensure customer service systems and tools are current and responsive.
- ***Be social.*** Social media and video are necessary tools for a local government. They are immediate, efficient, and cost-effective. Centralize or minimize the number of social media tools across the organization to foster a “go-to” information resource for all departments and subject areas.

4. CHAMPION COMMUNITY DIVERSITY

- ***Know Your Community.*** Be experts in understanding the diversity and composition of the community (e.g. age, family composition, cultural considerations, etc.). Anticipate their needs and interests, and respect how they receive information about District activities.
- ***There is no "general public."*** Recognize a community it not homogenous. Individuals and groups, and individuals of shared background or age, for example, have different needs and may be more or less interested in different issues/services.
- ***Build a goodwill relationship.*** Public participation is an ongoing relationship. Invest in keeping the community informed routinely. Build a two-way relationship with residents and stakeholders so they can rely on the District's communication tools and staff for accurate, current information and timely response.
- ***Encourage the community to lead and you to support.*** Look for opportunities to support community efforts or processes by providing information or tools if appropriate (e.g., kitchen table workshops, citizen-led meetings, community hosted panels or events, etc.).

5. SUPPORT STAFF IN ALL AREAS

- ***Everyone is a communications officer and everyone has something to contribute.*** Utilize staff in creating content – support a culture where everyone's job is to communicate well. Seek content and information from areas that are content-rich (e.g., archives, long-serving staff, etc.).
- ***Build strong relationships with media.*** Media remain a critical medium for conveying District information and influencing public opinion and engagement. Professional, two-way relationships are important to ensuring confidence and trust in process and information.
- ***Internal is external.*** Ensure internal communication efforts are robust to support strong information sharing within the organization. Local governments are often one of the largest employers in a community and the staff are residents and taxpayers as well. Staff can be excellent advocates for District initiatives, programs and activities when kept well informed. It's important that communication values are modelled and that employees can communicate directly within the community about the current activities of the organization.

PLANNING CHECKLIST FOR COMMUNITY EVENTS

A successful public event requires detailed planning and anticipation of the needs of attendees and staff. Here's a quick checklist:

VENUE

- [ ] Choose a venue that will accommodate more than the number of people you expect, and supports the format you have chosen
- [ ] Consider the location and how it supports all transportation modes, vehicle and bike parking, and bus routes
- [ ] Strive to have the building and room accessible for those with mobility, visual or hearing needs
- [ ] Visit the venue at the same time of day as your event is planned
- [ ] Consider acoustics, temperature, and natural light within specific event space
- [ ] Confirm what other events are occurring during the time of your event. Be aware of whether other events might attract others in the building or nearby, or whether neighbouring activities might conflict or generate noise
- [ ] Confirm where the washrooms and emergency exits are located and who is available to assist if venue support is needed

STAFF ROLES

- [ ] Ensure you've included enough staff to help set-up, facilitate and take down the event
- [ ] Establish clear roles and responsibilities for the event (e.g. set-up, reception, facilitation, rover, technical experts etc.)
- [ ] Meet prior to event start time to discuss what may occur at the event and ensure staff have shared level of understanding about key elements of issue and event, including what happens after event
- [ ] Attendees should be greeted and thanked as they leave
- [ ] Ensure attendees are aware of next steps or where they can go for more information after the event

SUPPLIES

- ☐ Venue contract with key contact information
- ☐ Door signage, sandwich boards or balloons to help attendees find the room or entrance.
- ☐ Tables, chairs for registration, catering and attendees
- ☐ Garbage, recycling and compost
- ☐ Table linens
- ☐ Podium
- ☐ Easels
- ☐ Laptop, projector, screen, speakers, microphone and presentation remote
- ☐ Sheets for attendees to sign-in and sign-up for future updates
- ☐ Refreshments (coffee/tea, cookies, muffins)
- ☐ Large format paper and pens
- ☐ Attendee counter (or “clicker”)
- ☐ Sticky notes in various colours and sizes
- ☐ Feedback forms/Comment cards
- ☐ Ballpoint pens and permanent markers
- ☐ Staff nametags, lanyards, and business cards
- ☐ Name-tags for attendees
- ☐ Visual aides (posters, maps, PowerPoints, background reports etc.)
- ☐ Water for presenters
- ☐ Clearly marked container for feedback forms, surveys or comment cards
- ☐ Notice of filming or photography if video or photos are being taken
- ☐ Miscellaneous kit: tape, rope, zap straps, scissors, large envelopes, band-aids, paper clips, large clips, elastics, petty cash, etc.

CLOSING THE LOOP: ENGAGEMENT SUMMARY REPORT

Upon completion of a public engagement process or event, it's important that what was done and what was heard is documented and shared in a staff report as part of the background for governance decision-making. This can be used to inform Council, staff, participants and the broad public who may not have attended but are affected by the decision. This becomes an important record and background document as a process or decision advances.

THE ENGAGEMENT SUMMARY REPORT MAY INCLUDE:

1. Overview of the Project/Process and Objective for Engagement

2. Outline of the Process - steps undertaken in overall process and associated timeline

3. Awareness and Engagement Activities Undertaken

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

4. What We Heard

- Include photos of events and images of promotional tools used and/or media coverage
- Theme/analyze open-ended comments. Depending on volume, privacy considerations and preferences of decision-makers, at times all open-ended comments are included as an appendix for review. Depending on the volume and nature of open-ended comments, these may sometimes be reported verbatim and not summarized. Note: Open-ended comments can often unintentionally identify an individual. A detailed review of all comments must be completed

THE ENGAGEMENT SUMMARY REPORT MAY INCLUDE:

5. Who We Heard From

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

6. Next Steps

- Outline the next steps in the process and how input will be used to inform the decision
- Note upcoming meetings or decision points and associated timeline

The District gratefully acknowledges the work of the members of the Mayor's Task Force on Public Engagement whose work informed this Public Engagement Framework and Toolkit.

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Councillor Eric Zhelka

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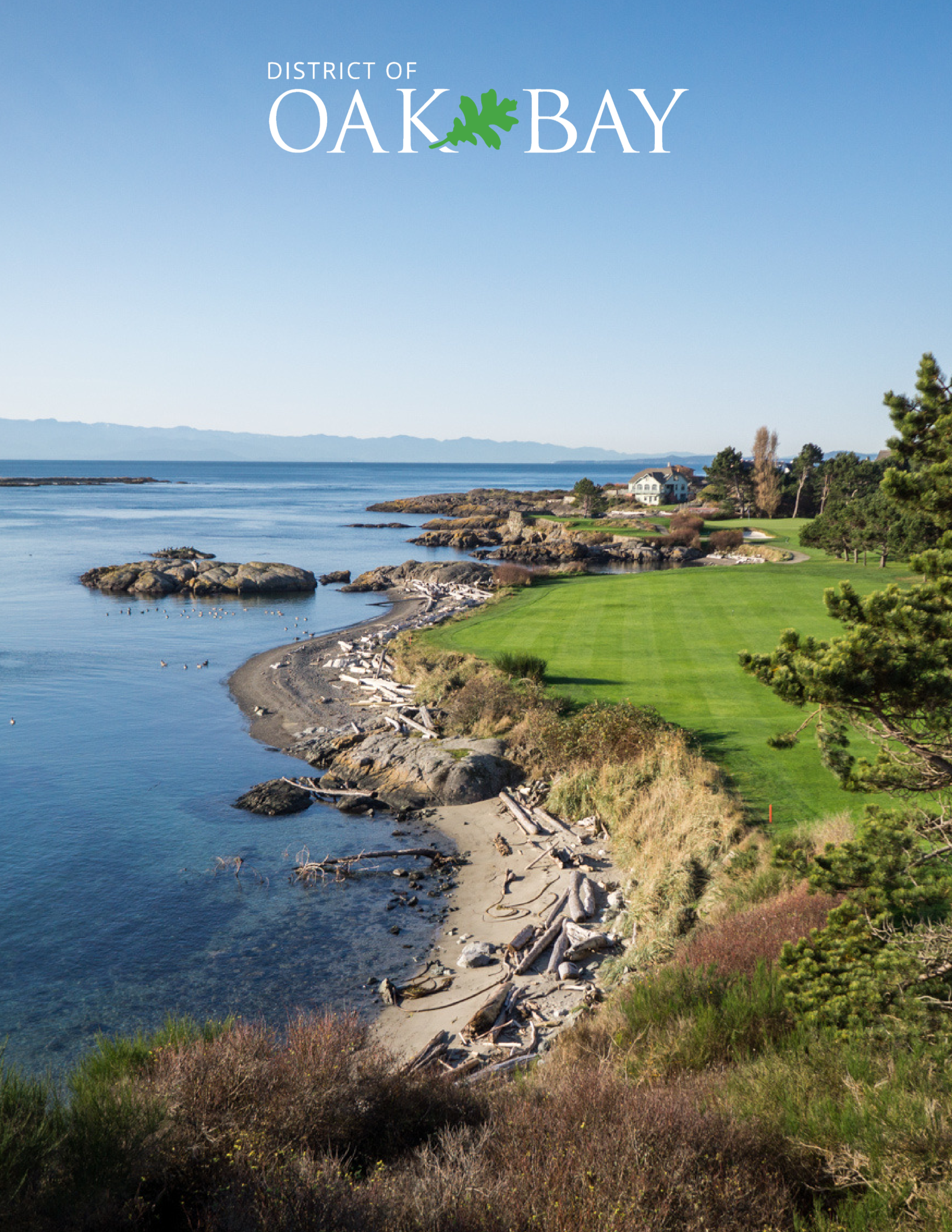
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