

2018

# Public Engagement Guide



## Table of Contents

Purpose.....	2
What is public engagement and what are the benefits? .....	2
Benefits.....	3
What guides public engagement? .....	3
Developing Your Plan .....	4
Step 1 – Determine the goal of public engagement.....	4
Public Engagement Continuum .....	5
How much engagement do you need to reach your goal? .....	6
Step 2 – Identify Stakeholders.....	7
Step 3 – Assess the Level of Community Impact and Choose Techniques to Engage the Public.....	8
Step 4 – Communicating the plan .....	24
Step 5 – Implementing the plan .....	24
Step 6 – Reporting and follow-up.....	24
Step 7 – Evaluating the public engagement process.....	25
Tools and Worksheets (attached) .....	26
Establishing an Advisory Group Guide .....	27
Components of advisory groups.....	27
Checklist Planning a Public Meeting – Tasks and Timelines.....	29
Checklist for an Accessible Meeting.....	31
Accessibility statements and scenarios for: .....	35
Public events, feedback, accessible formats and communication supports.....	35
Evaluation Questionnaire .....	36
Example of How Many Techniques Might Be Used in One Project.....	37

## Purpose

The Municipality of South Huron is a dynamic municipality that interacts with the public in multiple and various ways. For this reason, Council and Staff require a range of flexible public engagement techniques, both in person and online that can be used separately or in combination to engage the community in the activities and decision-making processes of the municipality.

The Municipality of South Huron Public Engagement Guide was developed to ensure open two-way communication with the community. Public engagement is a key component of open and transparent governance; it helps us to develop and deliver quality programs and services; and is important to South Huron achieving its mission and vision.

If you think you need to engage external stakeholders in the course of your work, such as if you are involved in the development of policies, programs or projects, then this guide is for you. It should be used for both short and long-term initiatives. The guide provides a practical step-by-step public engagement plan.

The guide should be used at the beginning of projects to ensure that the appropriate engagement tool or set of tools are being used. In addition to using the guide, staff should consider relevant legislation or other municipal public engagement policy requirements.

This guide will be kept evergreen. Comments are welcomed and suggestions for additional information or other tools required.

## What is public engagement and what are the benefits?

For some residents, engagement in municipal government means voting – and yes, voting is a form of public engagement called empowering, that is, when decision-making is placed in the hands of the community. But the municipality benefits immensely when it provides more active opportunities for public engagement than voting. Public engagement means regularly engaging the community through sharing information, through consulting, involving and collaborating on projects, development of municipal policies, strategies and plans for strategic investments. Public engagement includes any process that involves the public in problem-solving or decision-making and uses public input to help make decisions.

Our current engagement practices occur in two ways:

1. When engagement is mandated by legislation – such as the Planning Act, Environmental Assessment Act and Municipal Act
2. When engagement is not mandated by legislation – such as building new facilities or creating municipal budgets.

## Benefits

Public engagement can help the Municipality of South Huron do a better job. It provides a means for the municipality to share ideas, values and discover areas of mutual interest. It can also identify potential and existing concerns and areas of conflict before they escalate.

Ideally, the process brings together individuals and groups building cooperative working relationships and mutual understanding.

There are many benefits of engaging stakeholders, here's what public engagement can accomplish:

- Build cooperative working relationships
- Understand views, concerns, interests and expectations
- Leverage the wealth of talent in the community
- Collaboratively identify and/or develop recommendations and alternatives
- Bring attention to an important issue
- Reduce opposition and delays, prevent crises
- Achieve better decisions
- Create shared visions embraced by interests
- Help stakeholders understand the complexities of the issue
- Build stakeholder support and shared ownership in the decision, implementation and/or evaluation
- Help Council understand the needs and priorities of the community so they can make decisions with these needs and priorities in mind
- It is important to remember that benefits of public engagement are long-term.

## What guides public engagement?

In every process, regardless of the scope, the following principles should guide all public engagement activities. The Provision to Provide Public Notice and this Engagement Policy sets out the Municipal commitment to public engagement, including the guiding principles. This policy and guiding principles are the foundation upon which the public engagement framework is built and are fundamental to all engagement activities.

1. Valuing inclusiveness — ensuring public notice and engagement is based on building trust and relationships that seek to involve all members of the community.

2. Promoting open two-way communication — working with the community in a co-operative and collaborative way to share information and provide opportunities for open and constructive dialogue.

3. Providing timely communication — ensuring information is available in a timely manner.
4. Providing clear and accessible communication — ensuring the use of plain language in a wide variety of formats and channels of communication.
5. Being fiscally sustainable — ensuring methods and resources for public notice and engagement reflect the magnitude and complexity of the initiative.
6. Being transparent and accountable — sharing information and having open public engagement processes, final decisions and outcomes.
7. Being environmentally sustainable — ensuring environmentally friendly public notice and engagement methods.
8. Striving for continuous improvement — seeking better ways of engaging the community and providing efficient and effective public notice and engagement processes.

Following the guiding principles is the most effective way to build trust and to demonstrate Municipal commitment to the community. The guiding principles must be consistently demonstrated by Staff and Council involved in engagement activities.

## Developing Your Plan

This guide provides a step-by-step process to help you develop an engagement plan. Here is what the plan looks like:



### Step 1 – Determine the goal of public engagement

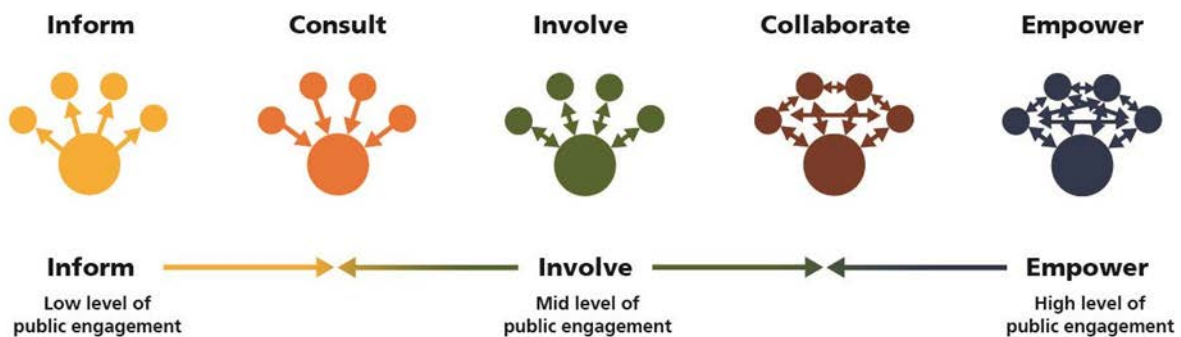
Sometimes it is difficult to determine if and when public engagement is necessary. As you begin to develop your project plan/work plan, you need to understand the results that are to be achieved by engaging the public. Start by asking yourself:

- In my project, which decisions can be influenced? Or is there an opportunity for people to influence the decision?
- If I engage, what is the public engagement objective (what am I looking to find out)?

Public engagement efforts should reflect the magnitude and complexity of the issue/project and the desired public engagement goal or outcome. If decisions cannot be influenced, then you will be providing the public with information or an education process. If decisions can be influenced or public engagement is appropriate for support for your project, creating an engagement plan is necessary. Begin with determining the goal and measurable outcomes of engaging the public.

The Municipality has adopted a framework (below) to help Staff, Council and the Community understand the various goals of public engagement. Each of the goals should not be seen as being isolated. Rather, each is a complimentary approach that can be used independently or in combination within a single project.

#### Public Engagement Continuum



Public Engagement Goal	Promise to the Public
<i>Inform</i> - involves providing information to: <ul style="list-style-type: none"> <li>• Notify stakeholders of an issue/project/decision</li> <li>• Assist stakeholders in understanding an issue/project – alternatives, opportunities, solutions</li> <li>• Prepare stakeholders for more intensive forms of engagement</li> </ul>	We will keep you informed
<i>Consult</i> - allows stakeholders the opportunity to provide feedback -	We will keep you informed, listen to and acknowledge concerns and

Public Engagement Goal	Promise to the Public
usually at one point in the project planning or implementation process	aspirations, and provide feedback on how public input influenced the decision
<i>Involve</i> - allows stakeholders to work directly with the municipality throughout the process to ensure that aspirations are consistently understood and considered	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
<i>Collaborate</i> - allows stakeholders to partner with the municipality in various aspects of the planning and decision-making process, usually including the development of alternatives and identification of the preferred solution	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
<i>Empower</i> - final decision-making is placed in the hands of the community	We will implement what you decide

#### How much engagement do you need to reach your goal?

Less engagement is appropriate when:

- There is no decision to be made
- Issues are low priority, routine in nature
- Providing information to the public (one-way communication) is most effective
- Legislative requirements define how much public engagement is required

More engagement is appropriate when:

- There is a decision to be made that requires public feedback
- Issues are high priority, controversial or have a health and public safety impact
- Public comments can have an impact on the design and development of a project
- Public buy-in is important for the project to be successful
- It's important to build partnerships and strengthen relationships between the community and the municipality on a project
- Issues that place the final decision-making with citizens or other stakeholders
- Legislative requirements define how much public engagement is required

Remember that communicating the plan will be very important. Contact the Corporate Communications section (Office of the CAO) early in the process to inform them about the project and to obtain suggestions. By involving Corporate Communications early in the process, staff will be able to help you determine optimal times and techniques to get your message out. Also remember the

municipality has corporate identity standards which should be followed at every stage of the public engagement process.

## Step 2 – Identify Stakeholders

Now that you have determined the goal of public engagement for your project (or goals depending on the complexity of your project), you need to identify the stakeholders.

It is important to remember that not all stakeholders will be impacted to the same extent or have the same level of interest in a project. Knowing your stakeholders will impact what engagement techniques to pursue (i.e. youth may want to communicate through social media outlets, to reach the silent majority you may want to consider using surveys or posting local signage in the community).

Remember that stakeholders do not have endless amounts of time to offer, so ensure their time is well spent by giving them the opportunity to have a meaningful impact on your project. Keep in mind that tokenism damages trust and buy-in so avoid involving a certain group simply to meet a quota or asking for input that cannot or will not be used or at least seriously considered.

The following is a list of potential stakeholders. The list is not meant to be exhaustive so make sure you identify any stakeholders who may not appear below.

- General Public
  - Those directly affected
  - Those indirectly affected
- Groups and Organizations
  - Residents associations
  - Businesses and business associations
  - Sport and recreation groups
  - Cultural groups and associations
  - Health organizations and associations
  - Professional associations
  - Environmental groups
  - Charities and service clubs
  - Places of worship and religious organizations
  - Not-for-profit organizations
- Government Institutions
  - municipal agencies, boards, commissions
  - Other municipalities
  - Provincial government
  - Federal government
  - School boards and local schools



- Council
- Municipal business units and departments

Anyone who is affected by a decision should be involved in some way in the decision.

*Remember* that depending on the scope and magnitude of your issue/project, interdepartmental communication is important. Other departments may help identify potential stakeholders.

### Step 3 – Assess the Level of Community Impact and Choose Techniques to Engage the Public

#### Assessment

Now that you have identified the goal of public engagement and who the stakeholders are, you will need to assess the “level of community impact” before choosing the appropriate engagement techniques. This means assessing the effect of an action or potential change in the community for which the Municipality of South Huron is responsible, or involved in. In other words, the degree (level one to five, below) to which people in South Huron would experience a change in lifestyle due to changes in service, a new development and/or issue.

#### Level of community impact

*Level one* – for issues or initiatives that are low priority, limited geographic area and/or community impact, limited target audience, routine in nature. Goal: to inform

*Level two* – for issues or initiatives that are low priority, broad geographic area and community impact, broad target audience, routine in nature. Goal: to inform

*Level three* – for issues or initiatives that are high priority, limited geographic area and/or community impact, limited target audience, controversial, health and public safety impact. Goal: to consult, involve or collaborate

*Level four* – for issues or initiatives that are high priority, broad geographic area and community impact, broad target audience, controversial, health and public safety impact. Goal: to consult, involve or collaborate

*Level five* – for issues that place decision-making with citizens or other stakeholders. Goal: to empower

#### Engagement Techniques

You will need to select techniques at each step in a decision-making process. Depending on the scope of your project, your objective, timelines and budget, there are a number of ways to engage the public both online and in person. The chart below provides techniques to engage the public but there are many other ways, be innovative and remember to keep accessibility of the participants, location and materials in mind. Be cognizant of Notice Requirements in accordance with Policy.

<b>Technique Description</b>	<b>Engagement Goal</b>	<b>When to use the technique – level of community impact</b>	<b>Cost and Time (level of effort)</b>	<b>Tips and Accessibility Considerations</b>
<i>Information on website</i> Use the municipal website to reach out and provide information.	Inform	Level: all	Time and resource/expertise are required to create and maintain content	Use plain language Websites can make information accessible and available to people who have vision loss, learning disabilities or difficulty getting to public meetings
<i>Posters</i> Use to provide information/promote event, project, program, service.	Inform	Level: all	Printing costs; design expertise Medium time	Use plain language Graphic depictions work well. Use colour contrast where appropriate to improve accessibility
<i>Digital screens</i> Used to advertise a meeting, event, survey, program or service. Located at the municipal offices, libraries and community centres.	Inform	Level: 1-5	Costs to prepare are minimal; however time and resource/expertise are required	Reaches those who attend municipal facilities in-person Corporate Communications designs digital screens, involve

Technique Description	Engagement Goal	When to use the technique – level of community impact	Cost and Time (level of effort)	Tips and Accessibility Considerations
				them early in the process
<i>Newspaper advertisements</i> Use to provide information/promote event, project, program, service.	Inform	Level: 2-5	Medium cost Medium time	Use plain language
<i>Television/Radio</i> Use media such as radio and community channel to present information (and elicit response) to a broad audience.	Inform	Level: 3-4 Many people will take the time to watch/listen rather than read	Can be expensive if you are buying the time Medium time	Develop tools to measure impact on audience
<i>Mobile (road) signs</i> Signs placed by the road to advertise a meeting, event.	Inform	Level: 3-4	Signs must be placed in accordance with the municipality's Sign By-law	Reach those who travel by the sign Information must be easily conveyed

<b>Technique Description</b>	<b>Engagement Goal</b>	<b>When to use the technique – level of community impact</b>	<b>Cost and Time (level of effort)</b>	<b>Tips and Accessibility Considerations</b>
<i>News Releases</i> <i>Use to inform media of an issue, project or event, municipal positions/statements, progress on projects or in response to events that have occurred that require a municipal response.</i>	Inform	Level: 3-5	Skill and expertise is needed to prepare this properly	Corporate Communications issues news releases for the municipality, involve them early in the process
<i>Open Houses</i> <i>Materials, plans and exhibits are displayed in a station format and the public is invited to tour through. Use to share information. Can be used in combination with other strategies to gather public perception/comment such as using comment cards.</i>	Inform	Level: 2-4 Excellent opportunity to educate Fosters small group or one-on-one communication Builds credibility	Preparation of materials, handouts, speakers and displays could be costly Usually more staff intensive than a public meeting	Information materials should be in plain language and available in accessible formats The location should be set up with several information stations, each addressing a separate issue. Venue should be accessible May be difficult to document public input One perspective can dominate discussion

<b>Technique Description</b>	<b>Engagement Goal</b>	<b>When to use the technique – level of community impact</b>	<b>Cost and Time (level of effort)</b>	<b>Tips and Accessibility Considerations</b>
<i>Tours and Field Trips – guided and self-guided Allows group(s) of stakeholders to tour specific site or sites. Opportunity for stakeholders to acquire greater knowledge about an issue or project.</i>	Inform Can be used to consult, involve or collaborate by providing an opportunity for people to discuss issues	Level: 3-4 Opportunity to build rapport	Costs of transportation must be considered Intensive planning and organization needed by staff	Be aware of accessibility needs such as accessible venues, materials in accessible formats and dietary considerations if food is provided
<i>Fact Sheets/FAQ's Provide information about a particular issue or project, usually one page on municipal website or print out.</i>	Inform	Level: all Opportunity to clarify information that is easy to read and reduces public concern	Minimal cost, depending on distribution Low to medium amount of staff time to gather information and prepare this effectively	Materials should be in plain language and available in accessible formats Consider using question and answer style
<i>Email Use to contact stakeholders and solicit input.</i>	Inform Consult	Level: all	No cost Medium to high amounts of time are needed to read, respond and direct input	Ensure you develop a way to analyze responses to make the data useful
<i>Interviews A one-on-one meeting or a small group focused discussion designed for a specific objective, such as learning about issues and publics for next phase of the</i>	Inform Consult	Level: 3-4	Costs can increase if providing food and travel. Need to book a room/ space Time needed to develop effective questions and approaches upfront	Be on time, polite, neutral Know your objectives for the interview Interview room/ location should be accessible Provide the interviewee with information beforehand

Technique Description	Engagement Goal	When to use the technique – level of community impact	Cost and Time (level of effort)	Tips and Accessibility Considerations
<i>engagement process.</i>				Helps build rapport
<i>Information Kiosks</i> <i>A station where project information is available. Can use to solicit input.</i>	Inform Consult	Level: 3-5	Can be minimal cost if materials are already prepared Staff resources needed to maintain and monitor	Can be permanent or temporary Can use technology to make the kiosk interactive and to gather comments
<i>Fairs and Events</i> <i>Use to build awareness or provide and share information about issues through exhibits and interactive activities.</i>	Inform Consult	Level: 3-4 Opportunity to highlight a project/ initiative and share information to a targeted and/or large audience	May be expensive with high degree of organization Usually one or two days at or hosting fair/event. Conducive to media attention	Be prepared for crowds if advertised widely Consider accessibility of venue Weather could play a factor if outdoors
<i>Telephone Hotlines</i> <i>Use to take calls from the public to gather information about issues or gauge concerns. Also used to provide information.</i>	Inform Consult	Level: 3-4 Provide updates on project activities so people don't get "the run around" when they call	If telephony is in place, costs are minimal Medium amount of staff time to create effective message and information	Need designated contact prepared for prompt and accurate responses Controls information flow Conveys image of accessibility

Technique Description	Engagement Goal	When to use the technique – level of community impact	Cost and Time (level of effort)	Tips and Accessibility Considerations
<p><i>Municipal Offices/Public Meetings – in-person, online</i></p> <p><i>An organized large group meeting usually used to make a presentation and give the public an opportunity to ask questions and give comments. Public meetings are open to the public at large.</i></p>	Inform Consult	<p>Level: 3-4</p> <p>Participants hear relevant information and have an open opportunity to ask questions and make comment</p> <p>People learn by hearing others' questions and comments</p>	<p>Costs usually minimal</p> <p>Staff resources usually minimal, depending on issue</p>	<p>Facilitators need to establish open and neutral environment for all views to be shared</p> <p>Emotions can be high and one perspective can dominate</p> <p>See planning a public meeting checklist (including accessibility considerations) attached</p>
<p><i>Public Information Meeting (PIM)</i></p> <p><i>Use to provide information and receive public feedback on development applications. Typically, this meeting is held before recommendations to Planning and Development Council.</i></p>	Inform Consult	<p>Level: non-statutory</p> <p>meeting held prior to legislated Planning and Development Council meeting</p>	<p>Costs minimal</p> <p>Staff resources needed to attend meeting, provide information and answers questions as needed</p>	<p>Planner makes a brief presentation</p> <p>Usually a workshop setting Venue should be accessible</p>

Technique Description	Engagement Goal	When to use the technique – level of community impact	Cost and Time (level of effort)	Tips and Accessibility Considerations
<i>Public Information Centre (PIC)</i> <i>Use to provide information and receive public feedback on road/engineering projects from traffic calming to road design.</i>	Inform Consult	Level: 1-4 Non-statutory unless chosen as public engagement type for class Environmental Assessments Fosters one-on-one communications	Costs associated with creating visuals Staff resources needed to attend, provide information and answer questions as needed	Consultant usually present to answer questions Drop-in event Visuals (story boards) provided Venue should be accessible Comment sheets are provided and should be available in accessible formats
<i>Twitter</i> <i>Social media messaging tool where brief messages can be shared with followers (could be a large audience). Can be used to inform of issues (such as service disruptions), upcoming meetings, events, programs.</i>	Inform Consult	Level: all	Costs to prepare are minimal; however time and resource/expertise are required Time needed to monitor and respond	Messages are brief, must be under 140 characters Followers may re-tweet your message so the potential audience reach is significant Social media may offer a platform for discussion/feedback to people with disabilities who find it difficult or cannot attend meetings. But remember that many popular social media platforms are not yet fully accessible



Technique Description	Engagement Goal	When to use the technique – level of community impact	Cost and Time (level of effort)	Tips and Accessibility Considerations
				Corporate communications drafts and shares tweets for the municipality
<i>Facebook Social media platform where meetings, events, photos, programs, services can be shared with followers.</i>	Inform Consult	Level: all	Costs to prepare are minimal; however time and resource/expertise are required Time needed to monitor and respond	Followers may share your message so the potential audience reach is significant Social media may offer a platform for discussion/feedback to people with disabilities who find it difficult or cannot attend meetings. But remember that many popular social media platforms are not yet fully accessible Corporate communications drafts and shares information for the municipality

Technique Description	Engagement Goal	When to use the technique – level of community impact	Cost and Time (level of effort)	Tips and Accessibility Considerations
<i>South Huron Citizen Engagement Tool (crowd sourcing) where participants share their opinions and ideas and vote or comment on others.</i>	Consult	Level: 3-4	Costs to prepare are minimal; however time and resource/expertise are required Time needed to monitor and respond	A question is posed to gauge community ideas and opinion. Residents can vote on ideas posted by others. Set a duration of time for keeping the forum active Social media may offer a platform for discussion/feedback to people with disabilities who find it difficult or cannot attend meetings. But remember that many popular social media platforms are not yet fully accessible
<i>Symposium A meeting or conference to discuss a particular topic. This may involve multiple speakers and multiple aspects of the topic.</i>	Inform Consult	Level: 3-4	Can be costly to bring in speakers Facilitator is necessary	Intended to expose participants to multiple aspects/ views on one topic Venue should be accessible

Technique Description	Engagement Goal	When to use the technique – level of community impact	Cost and Time (level of effort)	Tips and Accessibility Considerations
<i>Advisory Group/Committees</i> <i>A group of stakeholders or representatives of stakeholder groups that provide input on a project or initiative. Group can also be ongoing.</i>	Consult Involve Collaborate	Level: 3-4	Costs of staff time to support and resource the committee is substantial Volunteers must dedicate substantial time	Define the terms of engagement up front One perspective can dominate discussion Venue should be accessible Materials should be in plain language and available in accessible formats See Establishing an Advisory Group Guide attached
<i>Surveys – online, telephone, mail, in-person, hand-out</i> <i>Use to obtain data on issues, satisfaction levels, opinions and concerns.</i>	Consult	Level: 3-4 Works well for needs assessments and satisfaction levels for a representative number of people within the municipality, a particular group or the entire community	Can be costly It takes time to develop a valid and reliable survey	Determine whether the issue requires statistically valid data or qualitative input Questions should be worded carefully so as not to influence an outcome and written in plain language

Technique Description	Engagement Goal	When to use the technique – level of community impact	Cost and Time (level of effort)	Tips and Accessibility Considerations
<i>Comment Forms/Cards</i> A form given to people to complete and return.	Consult	Level: 3-4	Costs are minimal Effective questions take time to create, ensure they solicit information that is useful for decision-making	Results may not be representative of larger population Plan to accept feedback in a variety of ways. For example, some people with low vision may prefer to give verbal rather than written feedback
<i>Focus Groups</i> Small selected group that are formed to test ideas, messages and gauge public opinion.	Consult	Level: 3-4 Opportunity to test key messages prior to implementing program	Facilitator is necessary	Be clear about the objective when inviting participants Allow for insights, perspectives, opinions, ideas and suggestions If in-person meeting, venue should be accessible
<i>Voting pads (also called clickers or audience response technology)</i> Interactive tool which allows participants to weigh-in real time during meetings, events, etc. anonymously.	Consult	Level: 1-4	Facilitator is necessary	Be clear about the objective of using voting pads Provides instant feedback from participants to help guide a conversation/ gauge participants understanding or feelings on an

Technique Description	Engagement Goal	When to use the technique – level of community impact	Cost and Time (level of effort)	Tips and Accessibility Considerations
				<p>issue/identify priorities</p> <p>Venue should be accessible</p>
<p><i>Dot stickers</i>  <i>Use stickers to allow participants to weigh-in real time during meetings, events, etc.</i>  <i>Used in the same way as voting pads but participation is not completely anonymous.</i></p>	Consult	Level: 1-4	<p>Facilitator is necessary</p> <p>Cost is minimal</p>	<p>Be clear about the objective of using stickers</p> <p>Provides immediate feedback from participants to help guide a conversation/ gauge participants understanding or feelings on an issue/identify priorities</p> <p>Venue should be accessible</p>
<p><i>Task Force</i>  <i>A small group of stakeholders or experts formed to develop a product within a limited time, such as a set of recommendations, policy or proposal.</i>  <i>The product is passed through to official decision makers.</i></p>	Involve	<p>Level: 3-4</p> <p>Findings of a task force of independent or diverse interests will have greater credibility</p>	<p>Costs will increase if a facilitator is required</p> <p>Staff support/prep time is intensive</p>	<p>Be prepared to work through to compromise</p> <p>Venue should be accessible</p>

Technique Description	Engagement Goal	When to use the technique – level of community impact	Cost and Time (level of effort)	Tips and Accessibility Considerations
<p><i>Workshops</i>  <i>Involves a group of people who meet to work through an issue and/or develop solutions. To make workshops more interactive, discussions and dialogues typically involve the larger group as well as smaller group exercises.</i></p>	<p>Involve  Collaborate</p>	<p>Level: 3-4  Excellent for discussions on criteria or analysis of alternatives  Fosters small group communication  Ability to draw on other team members to answer difficult questions  Fosters public ownership in solving the problem</p>	<p>Costs can be minimal  Several small group facilitators are necessary</p>	<p>Hostile participants may use a “divide and conquer” strategy of breaking into smaller groups  Venue should be accessible  Materials and presentations should be in plain language and available in accessible formats</p>
<p><i>Public Hearings</i>  <i>Formal meetings where individuals or groups are invited to make presentations. May be formal or quasi-judicial meeting with legislated requirements. Typically used to satisfy regulatory requirements. Dialogue is time-limited. Comments are recorded. Examples include: Ontario Municipal Board (OMB) and Licensing Appeal Committee.</i></p>	<p>Involve  Collaborate</p>	<p>Level:  legislated</p>	<p>Costly  Staff experts needed to attend and speak to issues, can be time intensive to prepare for hearing</p>	<p>Designed around one specific issue  Feelings of conflict may accompany this type of activity, ensure neutral environment</p>

Technique Description	Engagement Goal	When to use the technique – level of community impact	Cost and Time (level of effort)	Tips and Accessibility Considerations
<i>Charrettes</i> <i>Mostly used with planning issues, the charrette is an intense problem-solving session where a facilitator leads a group to alternative solutions.</i>	Involve Collaborate	Level: 3-4 Promotes joint problem solving and creative thinking	Facilitator is necessary	Be clear on the promise to stakeholders about how their input will be used Use of visual techniques in designing issues can be helpful Venue should be accessible
<i>World Cafes</i> <i>A meeting process featuring a series of simultaneous conversations in response to predetermined questions. Participants change tables during the process and focus on identifying common ground in response to each question.</i>	Involve Collaborate	Level: 3-4	Costs usually minimal Time needed to prepare effective questions. Staff may be needed as facilitators/note takers at each table	Room set-up is important. The room should feel conducive to a conversation and not as formal as the standard meeting format. Venue should be accessible Think through how to bring closure to the series of conversations
<i>Citizen Panels</i> <i>A process that gathers a randomly selected and demographically representative panel of citizens to carefully examine an issue. A panel is usually tasked to provide recommendations or undertake research in support</i>	Collaborate	Level: 3-4	Costs medium-high Time and resource intensive	Involves citizens providing feedback on a public problem or issue A panel may provide feedback on more than one issue or on one issue more than one time

Technique Description	Engagement Goal	When to use the technique – level of community impact	Cost and Time (level of effort)	Tips and Accessibility Considerations
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*of a pending decision.*

*Citizen Juries*  
*A process that gathers a randomly selected and demographically representative panel of citizens for three to five days to carefully examine an issue. As the word "jury" suggests this group is usually empowered to make the decision on behalf of the decision-maker and a consensus decision is usually required.*

Collaborate  
 Empower

Level: 3-4

Costs very high  
 Time and resource intensive

Involves citizens in developing a thoughtful, well-informed solution to a public problem or issue  
 Venue should be accessible  
 Materials should be in plain language and available in accessible formats  
 A jury is disbanded once the decision is made

*Voting*  
*Casting one's ballot, the democratic voice of the people.*

Empower

Level: 5

Substantial cost to ensure voting process is valid  
 Intensive staff resources

Encouraging the public to vote is important  
 Voting process should be accessible



## Step 4 – Communicating the plan

Communicating the plan is an important element to the success of the public engagement process. With the Corporate Communications section, communication objectives should be set within overall public engagement objectives. Different communication strategies may be needed for different types of engagement. By involving Corporate Communications in step 1, you should now be ready to get your message out.

## Step 5 – Implementing the plan

This is where all the pieces come together. Keep in mind that public engagement work includes many variables so it is important that you closely monitor, and where appropriate, modify your approach. For example, the goal of engagement may need to change if the scope or magnitude of the issue changes; i.e. if an issue that was considered to be low impact becomes higher impact, the level of engagement should increase or vary accordingly.

Are you ready to implement the plan?

Be sure you have completed the following:

- Reviewed the guiding principles
- Identified public engagement goal and measurable outcome(s)
- Identified stakeholders
- Assessed the level of community impact
- Selected effective techniques to engage stakeholders
- Worked with Corporate Communications for how best to communicate your plan

## Step 6 – Reporting and follow-up

Reporting and giving feedback is an important step in the process – it ensures those involved see their input was received, understood and valued.

Be sure to:

- Acknowledge the participants who gave generously of their time, energy and expertise
- Advise participants when an outcome is expected
- Provide a record of the engagement process and how the final decisions were reached

Depending on your project, reporting to Council may be necessary. Remember that it means providing complete and unbiased results of the engagement process, supplying background information on the objectives of the engagement, defining the process used and the follow-up action taken and providing an outline of next steps or the decision.

## Step 7 – Evaluating the public engagement process

The final stage of the plan is evaluating the effectiveness of your public engagement process. It is important to understand what was done well and what could be improved upon in the future. It may also identify future needs within the same project as well as gather valuable information that may help with future projects that are similar. Evaluation should include internal and external considerations.

Key questions to ask during the evaluation include:

- Did the process reach the right people and ask the right questions?
- Did the people who got involved feel they were heard?
- Did the answers tell you what you needed to know?
- Did the process stay within the allocated time, budget and resources?

There are a number of techniques that can be used to evaluate the process. These can include informal discussions, interviews, questionnaires and evaluation forms.

One of the questions you might struggle with is how many people you need to engage in the evaluation. Of course it is ideal to involve as many people as possible but bigger isn't necessarily better. The scale and scope of an evaluation should consider scale and scope of the public engagement process itself, as well as the purpose and audience for evaluation.

**Measures** - measuring the expected outcomes is important to discovering whether you have achieved your goals and should be included in the evaluation. As you identified measurable outcomes in step 1, you will now be able to demonstrate the results of your plan. Opportunities should be provided to involve stakeholders in expressing their level of satisfaction with the progress made in achieving the objectives/outcomes. An outcome may indicate:

- satisfaction with the process
- success with the conclusion of the work
- approval of the recommendations/resolution of the issue

There is an evaluation questionnaire in the appendix to help you complete this final step.

Congratulations! You have completed the public engagement plan.

## Tools and Worksheets (attached)

Establishing an advisory group guide

Planning a public meeting checklist (including accessibility considerations)

Accessibility statements for public meetings, feedback, accessible  
formats/communication supports

Evaluation questionnaire

Example of how many techniques might be used in one project

## Establishing an Advisory Group Guide

What is an advisory group? A group of stakeholders or representatives of stakeholder groups that provide input on a project or initiative. Group can also be ongoing.

When to use them:

- When required by legislation, such as the County's accessibility advisory committee
- When there are high priority issues either municipality-wide or area specific and it is important to solicit information from diverse perspectives
- To solicit input on complex topics
- Some advisory groups are convened to provide advice over time, irrespective of a specific decision process, others are convened to support only one decision
- In either case, an advisory group can be used at any single step in the decision-making process or throughout the entire decision process

Why we use ongoing advisory groups:

- To build partnerships in the community
- To inform Council and/or staff of key community perspectives
- To provide a forum for constructively resolving issues
- To facilitate an effective information exchange
- To leverage expertise in the community

Key tips

- Advisory groups are useful when there is a high volume of decisions to be made that require some level of public engagement and the public is worn out
- Advisory groups may be helpful when the municipality can't really move forward because controversy will result in criticism, whatever it decides
- Advisory groups should talk at the level of strategies, not tactics

Keep in mind

- An advisory group's true purpose is to reflect public perspectives
- Ongoing advisory groups cannot substitute for broader public engagement
- Recommendations from advisory groups are not binding

## Components of advisory groups

Terms of reference must be developed that includes:

Establish the group's objective

- Advisory groups need to understand why they have been convened and to have a clear sense of purpose and the scope or topic on which their advice will be sought
- They can advise or recommend depending on their authority

- They can comment on reports and products
- Develop a specific product, like a plan, that will take a lot of effort over an extended period of time
- Provide input into the development of the public engagement plan
- Their mandate should be signed off by senior staff

#### Determine membership

- Can range in size but 8-10 is ideal
- Membership should reflect the breadth of relevant interests or perspectives around the issue to be addressed
- It may be appropriate for stakeholder groups (such as environmental groups and resident associations) to select a representative for the advisory group
- Depending on the issue, age, gender, disability or other demographic categories may need to be represented. One person can represent several categories
- Substitutes or alternates may be considered, particularly if the group is made up of representatives from specific organizations

#### Establish roles and responsibilities

- Members will be provided orientation to their responsibilities, at minimum members should:
  - Attend meetings regularly
  - Maintain an open mind regarding other views
  - Work as a team member
  - Focus on "the big picture"
  - Participate collaboratively in group decision making
- Determine if a chair will be selected by the membership or by Council
- The chairperson should be able to oversee meetings effectively and lead efforts to build consensus among different points of view
- Chairpersons should not see their role as helping the group function; they should not to push the group toward a particular outcome

#### Establish the operations

- Establish ground rules for behavior and process
  - Rzone, critique issues not people
- Advisory groups should be held as often as is necessary
  - On a long-term project with a volume of issues, meetings may be held at regular intervals such as monthly or quarterly
  - Groups that advise on a specific project may decide to schedule their meetings to coincide with decision points or important milestones
- Determine documentation that will be provided/compiled, could include attendance, agenda, summary of meeting
- Determine how the group's input is going to be communicated to the decision maker (Council/staff)

## Checklist Planning a Public Meeting – Tasks and Timelines

Timelines and tasks are ideal but should be modified as needed.

### **Eight weeks prior to meeting**

- Know purpose and goal of meeting
- Define stakeholders
- Determine timeframe (date, time)
- Establish budget
- Delegate tasks within core group (may be more/less than three individuals)
- Meeting coordinator – book venue, determine set-up, manage finances, book refreshments/food, book equipment and gather supplies
- Meeting promoter – produce printed materials, invite public, organize volunteers, market/promote meeting
- Meeting facilitator/spokesperson – create agenda, design presentation, facilitate meeting, answer questions and concerns

### **Six weeks prior to meeting**

- Book date, time, duration, location, equipment (laptop, projector, tables, chairs, flip charts, lectern, easels)
  - Ensure location and room layout is accessible, see *planning accessible meetings checklist* attached
  - Know room occupancy for fire regulations. If a large crowd is anticipated book a larger room or an overflow area
- Ensure sufficient parking
- Order supplies – clipboards, pens, markers, tape, notebooks, scissors, stickies, contact list with phone numbers, extension cords
- Schedule speakers, experts
- Discuss promotion of meeting with Corporate Communications – i.e. posters, flyers, handouts, media relations, advertisements
- Determine notification requirements

### **Four weeks prior to meeting**

- Create agenda
- Send invitations – include information about accessibility of location, find out if there are particular accessibility needs (i.e. listening/viewing devices) and if there will be food/ refreshments, ask if there are any dietary considerations. Include RSVP if applicable.
- Notify stakeholders/whole community
- Finalize promotion materials with Corporate Communications
- Recruit volunteers to assist (other staff, community members, students). Provide meeting purpose and details
- Order refreshments/food – ensure dietary considerations are addressed
- Ensure contingency plans are in place (e.g. snow date)

### **Two weeks prior to meeting**

- Send final notice to stakeholders
- Distribute promotional materials in community
- Finalize print and display material – fact sheets, sign-up sheets, questionnaires

### **Two days prior to meeting**

- Confirm meeting details – venue, room set-up, equipment, speakers, accessible needs (seating, listening/viewing devices)
- Confirm refreshments/food order
- Test presentation

### **Meeting day - *Items to bring***

- Print and displayed materials (fact sheets, sign-up sheets, questionnaires)
- Business cards, name tags
- Clipboards, pens, markers, tape, notebooks, scissors, stickies, contact list with phone numbers, extension cords
- Direction signs and arrows

### **Meeting day**

- Ensure room set-up is accurate and all equipment is present and working (*if meeting is on weekend, ensure this is done on last business day before meeting*)
- Make sure there are garbage/recycling receptacles (*if meeting is on weekend, ensure this is done on last business day before meeting*)
- All items (above) are at meeting
- Speakers and volunteers arrive at least one hour early to set-up and have briefing
- Greet participants as they arrive, hand out literature, collect names on sign-up sheets

### ***Tips for a successful meeting:***

- Begin with a welcome, clarify the purpose of the meeting, set expectations, ground rules (Rzone) and authority of the chair
- During the meeting, be an active listener - sincerely hear and understand what is being said
- Manage set expectations (ex. not everyone's perspective will be accommodated)
- Ensure technical staff have duties during the meeting (versus sitting together in the back corner of the room)
- If participants bring other issues to the table, ensure you visibly acknowledge and "park" them, giving your personal commitment to get back to them
- Know your public, if there is a participant(s) who will roadblock the meeting, involve them, don't marginalize them
- Ensure that you have a skilled and appropriate facilitator

- Stay calm if a situation becomes emotionally charged, ensure appropriate person (facilitator, chair, senior staff person) addresses the situation
- Allow for questions and answers
- When closing, summarize the meeting, include identification of next steps and timing, how participants can stay in touch with the process, thank participants for attending

### **After meeting**

- Return meeting location to original condition
- Provide summary of engagement process and feedback, could be online, emailed to participants, report to Council. *See accessibility statements with examples in the following section to help you*
- Thank staff, volunteers
- Debrief with staff, volunteers to evaluate the process and garner any additional insights (either right after meeting or within days)
- Return equipment

## **Checklist for an Accessible Meeting**

### **Pre Planning**

- Assign staff member to ensure meeting is accessible.
- Before confirming the date, find out if other accessibility-related events are taking place in the area during the same time frame. This may have an impact on your event and availability of service providers.
- Is there any renovation or construction work scheduled during the time of your meeting? (this may affect accessibility)
- As part of pre-event planning, ask if participants require accessibility accommodations. *See accessibility statements with examples in the following section to help you*
- Ensure that the invitation or notice of meeting includes information about the accessibility of the event.
- Check that there are visual fire alarms. If not, inquire about the facility's evacuation plan or create your own.

### **Refreshments and Dietary Arrangements**

- Are you giving participants an opportunity to indicate any dietary needs ahead of time (i.e.: when registering for the event)?
- When beverages are being served, are bendable straws and lightweight cups available within easy reach of people using wheelchairs and scooters?
- Are sugar-free beverages, juices and water available for people with dietary concerns such as diabetes?
- If food is provided buffet-style, will someone be on hand to help serve people with visual and physical disabilities?
- If pastries and cookies are on the menu, will you also have fresh fruits and vegetables for people with dietary concerns?



## ***Exterior Access***

### **Parking**

- Are there barrier free designated parking spaces available for estimated number of attendees with disabilities? If not, can you arrange for more designated parking spaces close to the building during the event? Is there accessible metered parking or public parking lots with accessible spaces close by?
- Is there level access or a curb cut from the parking area to the main entrance?
- If it is winter, are parking areas clear of snow and ice?

### **Sidewalk/Path of Travel**

- Is there barrier free path of travel from parking lot or drop off area to meeting entrance? (Path to be free of stairs and obstructions. If there is level change, ramp to be maximum 1:12 rise with handrails both sides)
- If winter, are walkways clear of snow and ice?
- For safety, are sidewalks separated from road and driveway?
- Are event personnel aware of stair free pathways to the event?
- Is there an area suitable for guide dogs to relieve themselves and water bowls for guide dogs?

### **Signage**

- Are signs for street address and building name clearly visible from street?
- Is signage well-lit at night (for evening events)?
- Are large letters and plain language used on signs directing people to specific areas?
- Are signs free of glare?
- Are additional signs specific to the event in large print?

## ***Interior Access***

### **Entrances and Lobbies**

- Are all entrance doors wide enough for barrier free access (minimum 32" clear)?
- If main entrance is not accessible, are there signs directing people to accessible entrance?
- Are entrances well lit?
- Are doors easy to open (with a lever handle or an automatic door opener)?
- Are large letters and plain language used on signs directing people to specific areas? Signs mounted at approximately 60" from floor for people in wheelchairs or with low vision.
- Is additional staff required at doorways too direct and assist?
- Are there telephones with auditory adjustments and TTY availability?
- Is there at least one telephone that can be used by someone seated?
- Are customer service areas low enough for wheelchair and scooter users to see over and across?

## **Elevators**

- Are elevators located close to meeting and large enough to hold power wheelchair and/or scooter users?
- Are there Braille buttons and raised numerals?
- Are elevator controls mounted at comfortable height?
- Do elevators have auditory signals for persons with low vision or who are blind?
- Do elevators have visual cue systems for persons who are deaf or hard of hearing?

## **Washrooms**

- Are there accessible washrooms near to meeting location?
- Does door signage have raised tactile male or female sign or Braille lettering?
- Do event planners know the location of accessible washrooms?
- Does washroom door have power operator?

## **Hallways & Corridors**

- Is there a clear path of travel to meeting area, washroom facilities, elevators and exits (width of 72" for persons in wheelchairs to pass one another)?
- Are floors slip resistant, glare free with low pile carpeting, hardwood flooring or tile?
- Are interior doors minimum 32" clear width?

## **Meeting Rooms**

- Is meeting room large enough to provide circulation and seating for anticipated number of participants who use wheelchairs, scooters, guide dogs etc.?
- Is accessible seating available throughout?
- Can a companion sit beside person with the disability?
- Is reception or refreshment area in a location with a clear path of travel?
- Are stage and speaking areas, including lectern or podium, clear of obstruction and accessible to wheelchair or scooter users?
- Check that noise levels (ventilation systems, noise from adjacent rooms) are not distracting.
- Does meeting room have drapes/blinds to provide reduction in glare or light from windows?
- Are cables, wires and microphones well secured (no loose cables) and not blocking path of travel?

## **Accessible Formats and Communication Systems**

- Provide materials in alternate formats and provide contact information on how to obtain these formats (per Corporate Identity Standards).

- Sign language interpreter for people who are deaf, deafened or hard of hearing.
- Real-Time Captioning (CART) – uses simultaneous speech to text translation for people who are deaf, deafened or hard of hearing.
- Computerized Note Takers – use laptop computer with a standard keyboard and overhead screen or monitor.
- Assistive Listening Systems – receives feed from the audio system found in meeting room.
- Interveners – may guide people who are deaf-blind.
- Communication Support Attendants – help people with disabilities access information.

## Accessibility statements and scenarios for:

Public events, feedback, accessible formats and communication supports

### **1. Statement for accessibility needs for public meetings, events, etc.**

#### **Statement template (whether or not an RSVP is required):**

If you have any accessibility needs, please let us know one week before the event by contacting STAFF NAME/or POSITION by phone [phone number, incl. TTY], email [email address] or by filling out the accessible online feedback form on [greyhighlands.ca](http://greyhighlands.ca).

#### **Scenario:**

Transportation is hosting a public open house on January 21, 2017, at the Municipal Office.

#### ***Statement used in the public notice and any promotions:***

If you have any accessibility needs, please let us know by January 21 by contacting the XXXXX by phone at 519-235-0310 ext. XXX, by email at [xx@southhuron.ca](mailto:xx@southhuron.ca) or by filling out the accessible online feedback form on [southhuron.ca](http://southhuron.ca)

### **2. Statement for providing or receiving feedback from the public in an accessible format or with communications supports**

#### **Statement template:**

We welcome your feedback. In addition to this [type of document] you can also provide comments by phone [phone number], email [email address] or fill out the accessible online feedback form on [southhuron.ca](http://southhuron.ca)

#### **Scenario 1:**

Administration is hosting an information meeting and is handing out a comment card to participants as a way to collect feedback on a new planning study.

***Statement placed on comment card:*** We welcome your feedback. In addition to this comment card, you can also provide comments to Administration by phone at (insert number), ext. (insert extension), by email at (insert email) or by filling out the accessible online feedback form on [southhuron.ca](http://southhuron.ca)

## Evaluation Questionnaire

Project name: \_\_\_\_\_ Date: \_\_\_\_\_

Evaluator's name and position: \_\_\_\_\_.

	No	Partially	Yes
1. The public engagement guiding principles were followed.	1	2	3
2. The objectives of engagement were clearly defined before starting.	1	2	3
3. The engagement goal reflected the magnitude and complexity of the project.	1	2	3
4. The level of community impact chosen was appropriate.	1	2	3
5. Attempts were made to reach and involve those directly and indirectly affected.	1	2	3
6. The engagement techniques chosen were appropriate.	1	2	3
7. Project results were communicated to stakeholders.	1	2	3
8. Measures were identified and achieved.	1	2	3
9. The process stayed within allocated time, budget and resources.	1	2	3
10. What went well?			
11. What can be improved for next time?			

### For office use

Calculate the average and check it against the performance ranges below.

From 1.0 – 1.5 Poor

From 1.6 – 2.0 Fair

From 2.1 – 2.5 Good

From 2.6 – 3.0 Excellent

## Example of How Many Techniques Might Be Used in One Project

*Project:* Build a new community centre and twin pad arena

*Stakeholders:* South Huron Community, sports and recreation groups, cultural groups, residents in the ward

*Level of Community Impact:* 4

Steps/Stages of the Project	Engage the public?	Public Engagement Goal	Technique
Announce funding and beginning of project	Yes	Inform – share information to prepare for involvement and generate interest	Information on website News release Letter to stakeholder groups
Determine what services and programs to provide	Yes	Consult and Involve – obtain ideas and suggestions from the community and other stakeholders	Online survey Comment cards Workshop World café Focus group
Complete preliminary design and site plan concepts	Yes	Consult - stakeholders will have the opportunity to provide feedback on user needs	Public meeting Focus group
Complete design details of building	No	n/a	n/a
Issue and complete a request for quotations	No	n/a	n/a
Construct building – ground breaking	Yes	Inform – keep public engaged and reduce concerns/questions	Information on website News release Email invite to targeted stakeholders

<b>Steps/Stages of the Project</b>	<b>Engage the public?</b>	<b>Public Engagement Goal</b>	<b>Technique</b>
Evaluate building and move in	No	n/a	n/a
Hold a grand opening ceremony	Yes	Inform – invite the public to attend a ribbon cutting ceremony and activities	Information on website News release Email invite to targeted stakeholders