Community Engagement Process Development

Public Participation Playbook

Created by Public Participation Partners
in association with Alta Planning + Design and City of Raleigh residents

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I. INTRODUCTION

WHAT IS PUBLIC ENGAGEMENT?

Public engagement for the City of Raleigh is any process that involves Raleigh residents in city problem solving or decision-making and uses their input to make sustainable decisions that affect their communities.

WHY IS IT IMPORTANT?

Public engagement fulfills the City's commitment to Raleigh residents by defining goals, identifying the needs of communities, and determining key audiences. It creates an opportunity for City staff to ensure that the decisions made reflect the needs of residents and provides a platform for residents to guide those decisions.

> **"The engagement professional's role is often to identify barriers to participation and help people to overcome them. Professionals face increasing responsibility to make it easier for the public to become engaged and stay engaged in a way that is meaningful and convenient for them."**

(Source: Planning for Effective Public Participation, Foundations in Public Engagement, IAP2 International Federation 2016, p.21)

Public participation can lead to well-informed decisions when decision-makers have complete information – in the form of community knowledge, values, and perspectives obtained from the public – that can be applied to the decision-making process. Decisions that incorporate the perspectives and expertise of all stakeholders are more achievable and sustainable because they consider the needs and interests of all participants, including vulnerable/marginalized populations. In addition, public participation helps participants better understand project impacts to their community and creates opportunities for participants to become invested in the project outcomes.

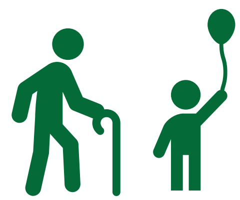
As a result, decisions that are informed by public participation processes are seen as more legitimate and are less subject to challenge. Decision-makers who fully understand stakeholder interests also become better communicators and are able to explain decisions and rationale in terms stakeholders understand and in ways that relate to stakeholders' values and concerns.

1.1 ENGAGEMENT REGULATIONS AND GUIDELINES

WHAT IS REQUIRED?

To ensure that the City's policies, services, and activities do not discriminate against any individuals or exclude or deny them from participation, the following regulations and guidelines must be followed:

Governmental Engagement Regulations & Guidelines



The Age Discrimination Act of 1975:
Prohibits agencies that receive federal financial assistance from discriminating based on age.

The Americans with Disabilities Act of 1990:
Ensures the rights of disabled individuals to participate and benefit from the services, programs, or activities of any public entity.

Title VI of the Civil Rights Act of 1964:
Prohibits agencies that receive federal financial assistance from discriminating based on race, color, or national origin, including matters related to language access for limited English proficient (LEP) persons.

Executive Order (EO) 13166, Improving Access to Services for Persons with Limited English Proficiency:
Requires agencies that receive federal financial assistance to ensure meaningful access to Limited English Proficiency (LEP)* persons in the form of translated written materials, language assistance, and concise, understandable, and readily accessible documents and notices.

**An LEP person is any individual that does not speak English as their primary language and who has a limited ability to read, write, speak, or understand English.*

Public agencies that receive federal financial assistance for transit and transportation projects are required to comply with all listed regulations.

Public agencies that do not receive federal financial assistance for their projects are not required to comply with Executive Order 13166 or Title VI of the Civil Rights Act; however, it is recommended that efforts are made to comply with the Americans with Disabilities Act.

Types of project that only require ADA compliance:

- Transit corridor studies
- Transit design projects
- Transportation planning and design projects that require environmental studies
- Corridor studies that require environmental studies and/or federal permits
- Census outreach and education

EQUITABLE ENGAGEMENT PRACTICES

Based on engagement recommendations and guidelines, it is recommended that the following practices be implemented for all city projects to ensure that the public participation process is fully inclusive and does not limit or deny access to participation:

- Include statements on public meeting notices that access to language services and disability accommodations are available and provide requested services at public meetings.
  - ◊ Example: "Assistance for Deaf and Hearing Impaired available; call 919-996-#### (voice) or 919-996-#### (TDD) at least # days in advance of meeting. Assistance for limited ability to read, speak, or understand English available; call (Project Manager) at 919-996-#### at least # days in advance of meeting.
- Work with community-based organizations and other stakeholders to identify and inform LEP individuals of outreach activities.
- Include public meeting notices in local newspapers in languages other than English.
- Provide public meeting notices on non-English language radio and television stations.
- Provide project materials and/or notices to apartment complexes, schools and religious organizations.
- Conduct public meeting and other outreach activities in spaces that are accessible for the disabled.
- Offer assistance for the hearing impaired at public meetings by providing American Sign Language interpreters or provide project information in writing and using graphics or other visual methods.
- Offer assistance for visually impaired by using large print in written materials and following Web Content Accessibility Guidelines 2.0 (WCAG 2.0) for all online content.
- Offer assistance to low-literacy individuals by ensuring that all written materials are written at an 8th grade reading level or less.
- Conduct public meetings on various days and times to accommodate the elderly, shift workers, and individuals with children.
- Conduct public meetings in locations that are accessible by transit.
- Provide an activity corner or childcare for all on-site public meetings.

Types of projects that are not typically required to comply with federal engagement regulations and guidelines unless federally funded:

- Area Studies
- Capital Improvement Projects
- Comprehensive Plans
- Neighborhood Plans
- Ordinance Updates
- Park Plans

II. ENGAGEMENT PLANNING

INTRODUCTION

Planning for the public engagement process is a crucial step in ensuring that engagement efforts are effective. Defining the goals and objectives for the public engagement process provides clarity about the engagement process. This step will help to minimize risk, avoid unnecessary expenditures of effort and resources, and reduce challenges to the process. Ideally, engagement planning should begin before a project contract is advertised to ensure that adequate staff time and financial resources are allocated to support the desired engagement process.

PLANNING FOR ENGAGEMENT HELPS AGENCIES

- ☑ Define engagement goals
- ☑ Identify the community's needs
- ☑ Determine key audiences
- ☑ Develop a method for measuring success
- ☑ Ensure that a public participation process
  - ✓ is needed
  - ✓ fits the context of the project
  - ✓ is based on a clear understanding of the challenge or problem

2.1 DRAFT THE PUBLIC ENGAGMENT PLAN

WHAT IS A PUBLIC ENGAGEMENT PLAN?

A public engagement plan outlines the process of involving the public in a decision-making process. It describes engagement goals and objectives, identifies key stakeholders, and outlines specific approaches and tools used to accomplish those goals. The plan should be used to guide the implementation of public engagement activities for all stages of the decision-making process that require public input. The plan can be an internal document or can be made public to educate residents about the city's plans for outreach and dialogue. Public engagement plans should be designed to be flexible based on the project and the public needs. It is necessary to create a clear and detailed plan for your engagement process prior to implementing any engagement activities. It is necessary to create a clear and detailed plan for your engagement process prior to implementing any engagement activities.

WHY IS IT IMPORTANT?

It is important to develop the public engagement process based on the needs of the community, not the convenience of the project team or agency. This includes the selection of communication strategies and engagement activities. The following steps will guide you through the process of developing an effective engagement plan.

2.2 DEFINE THE DECISION PROCESS

All projects require agencies to make decisions regarding how public funds will be used. Public engagement must follow a logical and transparent process that allows the public to understand how and why the decisions were made. Agencies can lose public trust by not involving the public in the decision-making process or by waiting until possible or preferred options have already been determined to ask for feedback.

To avoid this, it is important for engagement staff to understand the project's decision-making process so that they can plan their public engagement process to support it. Without a clear understanding of what type, how, and when decisions are made for a project, it is difficult to determine when and how to include the public in the decision-making process. The Decision Process Checklist will help you to identify the decision-making process for your project.

Plans for public engagement help to:

- ✓ Outline the steps that will be taken at each public input point and the data used to support the selected methods and tools.
- ✓ Offer consistency in implementation of strategies.
- ✓ Provide clear guidance to document and measure the effectiveness of engagement strategies that can provide insight for future projects.

DECISION PROCESS CHECKLIST

1. Define the purpose for the project:

- What is the problem to be solved or the decision to be made?
- What is the agency's position on the project?
- What types of actions are being considered?

2. Define the decision:

- What decisions need to be made during and as a result of the project?
- Who will make the decisions?
- What information will be used to make the decision?
- How will decisions be made?

3. Define the public's role:

- At what points in the decision-making process can the public most usefully contribute?
- What information is needed from the public to make the decision?
- What are the potential obstacles to obtaining public input (known controversy, budget, time, public distrust, etc.)?
- What decisions need to be made after engagement and how will the public be involved in that process?

4. Determine how decisions will be communicated:

- How will decisions made at each level be communicated to stakeholders, the affected community, and the public?

2.3 DEFINE PUBLIC ENGAGEMENT GOALS AND OBJECTIVES

The second step in the public engagement planning process is to identify the public engagement goals and objectives for your project. Setting goals is crucial for the engagement process because they determine how engagement is conducted, and can help you to understand the limitations, constraints, and resources required to implement the engagement process.

When setting engagement goals, keep in mind how engagement regulations and guidelines may apply to your engagement process. Other considerations include:

- Why do you need to conduct public engagement?
- What do you hope to achieve from public engagement?

Objectives for public engagement help to:

- ✓ Ensure that the public participation process is incorporated into the decision-making process
- ✓ Select the appropriate outreach tools and techniques and evaluate engagement outcomes
- ✓ Make it easier to develop and evaluate success measures

To make sure that your objectives are clear and reachable, each one should be **SMART**:

- **SPECIFIC:** State what will be done, expected outcome, and those involved.
- **MEASURABLE:** Define outcomes that can be measured and documented.
- **ACHIEVABLE:** Ensure that expectations are realistic based on known constraints (ex. time, staff resources, financial resources, community capacity, etc.).
- **RELEVANT:** Determine if outcomes of meeting the objective will support overall public participation goal and level on the International Association for Public Participation (IAP2) Spectrum.
- **TIME SENSITIVE:** Set expectation for when objective will be achieved.

2.4 IDENTIFY THE PUBLIC'S ROLE

The role of the public in the decision-making process will vary based on the project and the type of decisions. For example, a controversial project or a project with significant property impacts may require collaboration with the public at each stage of the decision-making process, including the development of alternatives and identification of the preferred solution. Conversely, a study update may only require the public to provide feedback on study alternatives or final recommendations.

It is necessary to identify the role of the public and the level of its participation in the decision-making process to determine what type of public engagement is needed to reach decisions.

IAP2 SPECTRUM

The IAP2 Spectrum was designed to assist with the selection of the level of participation that defines the public's role and the public participation goal that will drive the engagement process. Each level of public participation and the accompanying goal on the spectrum suggests that a commitment is being made to the public, and that the agency promises to take the identified action that will achieve the goal of the level selected.

INCREASING LEVEL OF PARTICIPATION

INFORM: is a form of one-way communication conducted by the agency to provide information to community members.

CONSULT: community members are informed of and can provide feedback on provided options but have little to no involvement in developing solutions.

INVOLVE: allows for more discussion with community members as well as flexibility for alternative outcomes in the project; however, it is important to be transparent with the public about the final decision-making process before expectations are formed.

COLLABORATE: emphasizes the partnership between community members and the agency where a level of decision-making control is delegated to the community involved.

EMPOWER: allows the community to make the final decisions.

Increasing level of participation →

Chart 1: IAP2 Spectrum of Participation

	Inform	Consult	Involve	Collaborate	Empower
Public Participation Goal	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
Promise to the Public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.
Example of Tools	Fact sheets, websites, open houses, mailings, social media	Public comment, focus groups, surveys, public meetings	Workshops, deliberative polling	Stakeholder advisory committees, consensus-building, participatory decision-making	Stakeholder Resident juries, ballots, delegated decisions

(Source: Planning for Effective Public Participation, Foundations in Public Engagement, IAP2 International Federation 2016, p.29-30)

The public participation process involves a commitment to the public to provide them with information, communication, and access to influence on the decision being made. Without clear expectations, the public may develop a wide range of assumptions about the public involvement process that are not intended and unable to be fulfilled.

When making promises to the public, it is important to consider these three factors:

- ✓ Clarify expectations and commit to things that can be delivered.
- ✓ Follow through on the commitment.
- ✓ Effectively and consistently communicate the commitment to the public.

IDENTIFYING THE PUBLIC'S ROLE:

- ☐ **STEP 1:** Determine what the public can expect from the engagement process.
- ☐ **STEP 2:** Identify what level of participation the decision-makers will support.
- ☐ **STEP 3:** Decide what influence the public has and what things they cannot change. Use the Decision Process Checklist on page 9.
- ☐ **STEP 4:** Identify what assumptions/ constraints may limit a decision.
- ☐ **STEP 5:** Based on the responses to steps 1-4, select the level of participation that best matches participation goals.

2.5 RESEARCH AND COLLECT DATA

The next step of the engagement process is thorough analysis of the social and economic characteristics of the project area, and identification of potential stakeholders.

1. DEFINE THE OUTREACH AREA

The project outreach area is a defined geographic boundary that is used to identify residents and stakeholders who are most affected by the project. The boundary is determined by (but should not be limited to) the defined project study area, and includes all directly impacted properties, and/or all persons most likely to use the proposed resource or service (ex: pedestrian shed).

Create the outreach area boundary using a GIS service (likely ESRI ArcGIS):

STEP 1: Analyze the area surrounding the project study area to determine which properties should be included.

STEP 2: Draw a boundary line around the desired area or create a buffer based on the desired distance from the study area line, corridor centerline, or proposed resource/ service location.

STEP 3: Follow natural boundary lines (ex. roads, parcel lines, natural features, etc.) when possible to ensure that whole properties are included.

2. CREATE A DEMOGRAPHIC PROFILE

A demographic analysis determines the best methods for engaging residents within the project outreach area and additional resources that may be required. By determining the diversity of a community, engagement staff can create participation methods that can engage different stakeholders productively and create a more inclusive engagement environment.

STEP 1: Using Census data, identify the Census Tract Block Groups that encompass the outreach area. Do not include block groups with no residents.

STEP 2: Locate the most recent American Community Survey data to collect the following data for the outreach area and the city:

- Race including Hispanic or Latino Origin by Race
- Poverty Level
- Median Household Income
- Zero Car Households
- Limited English Proficiency
- Disability Status
- Age
- Educational Attainment
- Housing Tenure

STEP 3: Compare the outreach area data to the city data.

STEP 4: Document notable presence of people of color, low income, or limited English proficiency, as well as disabled, youth, senior, and renter populations.

STEP 5: Conduct field visits, examine satellite imagery, consult with community leaders, and use other sources to help to identify groups that are too small to be noted at the Census geography level.

Building Community Relationships

It is good practice to contact community leaders early in the engagement planning process to:

- Notify them of the upcoming project.
- Ask for their advice on how to best engage the groups that they represent.
- If they would be willing to assist with making the initial introductions.

3. HOW TO USE THE DEMOGRAPHIC PROFILE DATA

Once special populations within the outreach area have been identified through Census data, field visits, and community leader input, it is possible to customize engagement strategies and determine the resources needed to reach each group. Refer to Chart 2: Demographic Profile Engagement Considerations for more information.

Demographic Profile Engagement Considerations

Race

If there is a notable presence of people of color and/ or immigrant groups, then consider the following:

- Are there any cultural, religious, political, or historical factors that may influence or serve as barriers to their engagement? (ex: appropriate meeting venues, meeting times/dates, perception of safety in government interactions, etc.). If possible, consider contacting community leaders to identify best methods to engage these groups.
- Is it possible that these groups could be disproportionately or adversely impacted by the final decision? If yes, consider conducting small group meetings with these groups to identify ways to avoid or mitigate potential negative or adverse impacts.

Poverty

If there is a notable presence of low income and/or zero car households, consider:

- Holding meetings at multiple times of day and on weekends to accommodate shift workers.
- Holding meetings in geographically accessible locations and/or providing transportation to/from meetings.
- Offering child care and refreshments.
- Ensuring that all online outreach uses mobile friendly platforms and do not require application downloads to view.

LEP

- According to N.C. Department of Transportation standards, if at least 50 adults of a Block Group's population within a language group speak English less than very well, then it is recommended that oral interpreters be provided at meetings and targeted media advertising be used to reach these individuals.
- Federal guidelines state that if a language group that speaks English less than very well exists within the outreach area that either has 1,000 adults or makes up 5% of the aggregate population (with at least 50 adults), then translated meeting and notification materials should be provided.

Education

- If there is a notable presence of residents with less than a high school education, consider lowering the reading level of all outreach materials.

Chart 2: Demographic Profile Engagement Considerations (cont.)

Demographic Profile Engagement Considerations	
Disability	After reviewing disability status data, if there are residents with disabilities within the project outreach area, consider: • Providing American Sign Language (ASL) interpreters at public meetings by participant request (see the access to language services and disability accommodations statement on p. 5). • Following ADA accessible recommendations for print and visual materials. • Providing phone-in lines or video conferencing sessions for public meetings. • Providing staff to assist disabled participants. • Holding meetings in accessible venues. • Including a request for accommodations statement on all meeting notices. • Following Web Content Accessibility Guidelines 2.0 (WCAG 2.0) for all online meeting content.
Age	If there is a notable presence of senior residents, consider: • Limiting the use of online or social media outreach and instead use direct mailers. • Following ADA accessible recommendations for print and visual materials. If there is a notable presence of youth, consider: • Incorporating methods to obtain their input through essays, poster contests, video submissions, or interactive visioning exercises during public meetings.
Housing	If there are renters living in the project outreach area, consider: • Ensuring that all mailed notices are sent to the property owner AND physical address. • Asking apartment property managers to distribute notices using their communication channels and/or to host popup events to allow the project team to engage residents.

2.6 IDENTIFY POTENTIAL STAKEHOLDERS

The identification of potential stakeholders is an important step to making sure outreach and engagement efforts are effective, representative, and equitable. Stakeholders are typically individuals, groups, or communities who have a vested interest in or affected by the outcome of a project or decision.

There are generally three (3) types of stakeholders:

- Primary stakeholders: People that are invested and will be directly impacted by a decision (ex: project area property owners and tenants)
- Secondary stakeholders: People that are indirectly affected by a decision (ex: project area commuters)
- Tertiary stakeholders: People that are not likely to be affected directly or indirectly by a plan or decision but still have an interest in the outcome (ex: general public, developers*)

**may vary depending on the project*

1. RESEARCH POTENTIAL STAKEHOLDERS

The first step to identifying stakeholders is to determine who will be directly or indirectly impacted by the outcomes of the decision or project.

It is important to pursue local community support in identifying potential stakeholders. Determine which organized groups and individuals are interested in the project or decision's impacts, or view the project or decision as controversial.

Seek out community leaders, gatekeepers, and organizations that have standing relationships within a community to help identify hard-to-reach groups or individuals. Hard-to-reach groups may include people with limited English proficiency, immigrants, religious minorities, indigenous groups, senior citizens, people with disabilities, families with young children, renters, new residents, and/or people who do not belong to organized groups.

Youth are another group that are traditionally left out of the decision-making process. Youth often serve as conduits for people of color, persons with disabilities, and individuals with limited English proficiency.

Some specific types of stakeholder groups include:

- Property owners
- Businesses
- Local, regional, state and federal agencies
- Elected officials
- Civic associations
- Interest groups
- Communities of color
- Labor organizations
- Youth
- New immigrants
- Renters
- Indigenous nations/groups/band councils
- Educational institutions
- Seniors
- Advocacy groups
- LGBTQQIA2-S communities
- Limited English Proficiency (LEP) individuals
- Faith-based organizations
- Neighborhood groups

It is important to consider ways to engage youth and to make outreach activities more accessible to them.

Community leaders, gatekeepers, and organizations that have standing relationships within a community are often found in:

- Church or faith-based organizations
- Homeowner associations
- Resident groups and local organizations
- Neighborhood groups
- Senior groups
- Service groups
- Cultural groups
- Non-profits that provide services to groups
- Schools or parent groups in the area

Approaching and recruiting these gatekeepers and obtaining their support can lead to successful outreach efforts.

When developing a list of stakeholders, consider the following:

- Are there specific communities that will be impacted/affected by decisions?
- Are people already organized?
- Who is typically not involved in the process?
- What steps will you take to ensure the inclusion of impacted communities that have not historically been involved in the decision-making process?

Once you have identified your list of potential stakeholders, create strategies for:

- Locating stakeholders and how they can best be reached.
- Informing stakeholders about the project or process.
- Educating stakeholders on why it would be beneficial for them to be involved.
- Informing stakeholders about how their views will be taken into consideration.
- Building a relationship with stakeholders.

SURVEY OF COMMUNITY PREFERENCES

As a part of the City Planning Department's Community Engagement Study, Raleigh residents were asked to identify the barriers to engagement that they experienced during past City Planning Engagement efforts. Barriers to engagement included:

- Lack of trust in the City
- Lack of City transparency
- Did not feel input would be valued
- Not aware of outreach activities
- Inconvenient meeting times and locations
- Information not easy to understand
- Not sure where to find information
- Do not feel knowledgeable enough to contribute

2. IDENTIFY STAKEHOLDER ISSUES

Before engaging stakeholders, answer the following questions to create a profile for each stakeholder group.

- What is the issue?
- What is each stakeholder level of impact?
- What is the level of concern among stakeholders?
- What area is the stakeholder located in relationship to the project?
- Are there any language barriers?
- Is there government mistrust?
- Is there disagreement to the project?
- Is education on a particular topic necessary?

3. DEVELOP STAKEHOLDER RELATIONSHIPS

Developing stakeholder relationships can help to build trust, communication, and understanding to bridge the gap for all parties that have a stake in the decision-making process.

STEP 1: Schedule to meet with the community leaders.

STEP 2: Develop a list of questions to ask.

STEP 3: Find out what their issues and/or concerns are.

STEP 4: Explain how their feedback will be used throughout the decision-making process.

The questions below will help you build a relationship and begin to understand the context and perspective that each stakeholder brings to a project. They will also help you identify any other stakeholder voices that may be missing in the conversation.

- What is the history of the community?
- Who are the leaders or gatekeepers in the community?
- What other groups should we be talking to?
- Which groups are not represented?
- What are some reasons why groups do not participate?
- What are some of the local gathering places?
- What are the best methods to reach and engage the community?

It is important to seek opportunities to engage stakeholders outside of the formal engagement process to develop relationships that are not solely based on a transactional need for their input.

- Look for opportunities to support the education efforts of community organizations and neighborhood groups by providing them with information on agency resources and services.
- Attend neighborhood group or community organization meetings to introduce the department instead of a particular project.

4. COMMUNITY LEADER GROUPS AND ADVISORY GROUPS

Community advisory groups are special interest groups that represent their communities and/or neighborhoods. They assist with how local agencies provide services and bridge communication gaps between agencies and the general public. Community advisory groups meet on a regular basis and are often appointed by City Council.

Community Leaders

Community Leaders or Ambassadors are community or organization leaders who serve as a liaison between the community and agency and assist the agency with notifying, educating and involving residents in a project engagement process.

Community Leaders can serve as champions for the project and help to ensure that their community is actively involved in the decision-making process. Community Leaders are best used for engaging diverse populations and communities with a history of agency distrust, and can be used at a single step or engagement phase or throughout the decision-making process. Responsibilities for a Community Leader/ Ambassador include:

- Distributing outreach materials to their members.
- Promoting outreach activities.
- Hosting agency led stakeholder or small group meetings, community conversations, or popups.
- Collecting resident feedback on behalf of the agency.

> **A public advisory group cannot substitute for broader public participation. In addition, if a group does not appear to be representative of a broad range of perspectives, the public may object to an agency's reliance on its advice."**

(Source: Foundations in Effective Public Participation - Techniques for Effective Public Participation, IAP2 International Federation, 2016 p.94)

Advisory Groups

Advisory groups are community volunteers appointed by City Council to provide oversight of the project planning process and ensure that decisions include a broad representation of the community. Selected members represent various project stakeholder groups. Members should serve as an important link to build a partnership and facilitate an effective information channel between the agency and community.

Appointed bodies like advisory groups are best used for controversial projects or when there are many decisions requiring some public input, but the public is worn out, and should be used throughout the decision-making process. Responsibilities for advisory groups include:

- Reviewing and commenting on the project scope.
- Reviewing and commenting on the engagement scope and plan.
- Providing input on the development of project concepts and final plan recommendations.
- Distributing outreach materials to their members.
- Promoting outreach activities.
- Informing the agency of community perspectives on project decisions.

Community advisory groups are an efficient way to engage stakeholder groups in the community without requiring participation from the general public. As it is critical that these representatives best speak for the community stakeholders, stakeholder analysis is the first step in establishing an advisory group.

Conducting a stakeholder analysis helps to establish encompassing representation of the community stakeholders. After the analysis, use recommendations from community leaders to choose members of the advisory group. In the first meeting, establish rules, objectives, and concerns/issues to be discussed by the group and work to address ongoing issues in further meetings. This process is outlined in more detail in Chart 3: Establishing a Community Advisory Group Process.

Pros and Cons of Using a Community Leader or Advisory Group

PROS

- Assists with expressing views of people that share the same thought process
- New ideas often emerge
- Hold decision-makers accountable
- Opportunity to facilitate or change the outcome of a decision
- Develop advice specific for the decision-makers
- Access to high levels of information
- Useful when the general public is worn out
- Promotes public participation from the community
- Helps to build relationships and establish trust between the agency and community
- Helps to resolve differences in a way that is acceptable to all parties

CONS

- One individual can drown out the views of the entire group
- Group leaders may not always act in the best interest of the group
- Residents may not have knowledge on how to become part of certain groups
- Members may not truly represent the community in terms of diversity or perspective
- Lack of project understanding can sometimes convey the wrong message to communities
- Often are used in the place of obtaining input of the general public

Chart 3: Establishing a Community Advisory Group Process

Establishing a Community Advisory Group	
Task	**Description**
1. Stakeholder analysis	• Conduct a community profile to identify relevant affected and interested groups and barriers to engagement. • Identify currently active committees. • Consider special interest groups. • Analyze potential groups/individuals to ensure relevance and capacity. Identify conflicts and alliances between stakeholder groups and provide insight into likely perspectives. • Provide ongoing opportunities for involvement as issues change or new residents become interested in/affected by operations.
2. Select the Community Advisory Group Members	• Conduct an application or selection process to choose members of the advisory committee; seek recommendations from trusted community leaders. • Choose 5 - 12 residents (depending on the project scope) who are of different races, incomes, and educational backgrounds. • Make sure your final member selection represents the full range of perspectives on the project or decision.
3. First meeting	• Clearly state the role, purpose, and objectives of the advisory group. • Conduct an icebreaker process to enable participants to identify themselves and share their values/perspectives. • Collaboratively determine the terms of reference, decide the ground rules, and determine the ongoing committee process, including reporting requirements, grievance processes, and communication networks (e.g. email lists, newsletters, websites). • Collaboratively determine if any important stakeholders are currently not represented through a brainstorm/mind-map/snowball sampling technique. • Determine current concerns/issues and where to gather more information for the next session. • By consensus or election identify a group chairperson. • Identify potential opportunities for education or training to ensure that all members have the same level of understanding of project topics, processes, etc. • Identify the resources or materials needed for members to support community outreach efforts.
4. Subsequent meetings	• Summarize the previous meeting and provide hardcopies of minutes, terms of reference, ground rules, etc. • Set agenda for current meeting. • Work through issues and concerns. • Set up working committees where necessary to focus on specific concerns.

2.7 SELECT ENGAGEMENT TOOLS AND TECHNIQUES

There is no one-size-fits-all approach when it comes to community engagement. A range of activities are necessary to reach stakeholders, engage the people most critical to the project, and encourage participation.

SELECTING ENGAGEMENT ACTIVITIES

When considering which engagement type to choose, keep in mind the following questions:

- Can we generate the required information and outputs to satisfy the objectives of the process and make the necessary decisions?
- Can we build meaningful relationships using this technique?
- What level of public engagement is preferred (or required)?
- What public engagement techniques best suit the participants' skill or education levels?
- What techniques are applicable given the available resources?
- What needs to be completed to satisfy regulations?
- What techniques will achieve the goals and objectives?

It is important to consider the logistics involved in planning and implementing engagement techniques. By doing so before implementing an engagement strategy, can help to increase public interest and participation.

MEETINGS

Meetings can be useful to share information, provide opportunities for participation, and to educate the public on certain issues or topics. Meetings can be used for either large or small groups of residents. Identifying what type of engagement activities to conduct during the meeting depends on the reason for engagement and the level of participation needed.

Appendix A outlines the most widely used meeting types and includes information on when each type is best used, the level of participation it elicits, and the resources required. Below are best practices for each meeting type.

FORMAL PUBLIC MEETINGS

Public Meetings/Public Hearings

Level of participation: inform and consult

Public meetings and hearings are structured meetings with an agenda during which the project team conveys information, listens to comments, and answers questions. It may include a formal presentation, a Q&A session, and an informal discussion period.

- Keep presentation to a minimum.
- Test presentation prior to the meeting.
- Make sure presentation is clear, understandable, and legible.
- Minimize technical language.
- Review station assignments with staff.
- Conduct a site visit of location to prepare logistics (room arrangement, projector, etc.).
- Create an agenda and equipment and supply list (flip charts, projectors, refreshments, etc.).
- Prepare for breakout sessions and discussion tables.
- Create a meeting plan for staff that details the agenda, any staff roles, questions for the staff to ask, and any other necessary information prior to the meeting.
- Consider who should be notified and what tools to use for notification.
- Record and transcribe meeting.
- Consider childcare and refreshments.
- Follow-up with meeting notes and summaries and make available to participants.

Workshops

Level of participation: involve and collaborate

Workshops are used to allow participants to work on an interactive exercise or activity to develop ideas and input.

- Provide a facilitator and staff to document key input at each table.
- Begin with explanation of activities/ exercises to the larger group prior to breaking out into smaller groups.
- Make sure you have a convenient location with space enough for participants to freely move around.
- Have clear instructions as to what the activities or exercises entails.
- Notify participants that interaction and work is involved.
- Provide the necessary support staff and materials.
- Predetermine how the activity or exercise results will be used.
- Chose activities depending on the demographics of the group and what kind of feedback solicited.
- Be respectful to all participants.
- Provide time for each table to report results to the group.

Open Houses

Level of participation: inform and consult

Open houses are informal and self-serving with stations displays to educate and receive input about a project.

- Select location within community large enough to accommodate.
- Create a meeting plan for staff that details the agenda, any staff roles, and any other necessary information prior to the meeting.
- Provide handouts with project descriptions, graphics, team contact information.
- Clearly identify staff with name tags.
- Consider staff attire based on the audience.
- Be mindful of time when scheduling event.
- Conclude with a comment station.
- Consider refreshments and childcare options.
- Arrive early to do a walkthrough of stations and to greet participants that arrive early.
- Debrief after participants has departed to discuss views on how the meeting went.

Small Group Meetings

Level of participation: inform, consult, involve, and collaborate

Small group meetings are structured meetings (comprised of 5-20 people) with an agenda during which the project team conveys information, listens to comments, and answers questions. Small group meetings can also be used to discuss issues and/or concerns about a particular topic.

- Conduct in discussion table format.
- Provide a facilitator and a scribe to take document key input at each table. Scribes can either be staff or volunteer meeting participants.
- Prepare appropriate equipment and/or supplies.
- Create a meeting plan for staff that details the agenda, any staff roles, questions for the staff to ask, and any other necessary information prior to the meeting.
- If you are holding more than one small group meeting, the meeting plan can help keep the process and methods of feedback standard across meetings and make sure the same questions are asked of the participants.

SURVEY OF COMMUNITY PREFERENCES

Engaging Diverse Communities

CEPD Community workshop participants provided the following resident recommendations for city-led public meetings:

- Small group meetings with affinity groups (disabilities, immigrants, etc.)
- Streaming meetings online/engaging online (surveys)
- Remote access – combine live meetings with live streaming on Community TV
- Pop-ups – going where people already are
- Present new ordinances and procedures and changes at many existing organization meetings such as CACs, neighborhood associations, other community groups like WakeUp Wake County or Power Up
- Plug into what already exists

Charettes

Level of participation: inform, consult, involve, and collaborate

Charettes are intensive planning meetings where residents and staff collaborate on a concept, collect group perspectives, set priorities, and reach conclusions for development and/or planning. It provides a forum for ideas and offers the unique advantage of giving immediate feedback to project staff.

- Give clear instruction and outline agenda.
- Provide clear objectives of the charrette.
- Have space to accommodate large groups.
- Prepare staff to answer questions with consistent responses.
- Create a meeting plan for staff that details the agenda, any staff roles, and any other necessary information prior to the meeting.
- Have project/study background information available.
- Record input.

Focus Groups

Level of participation: consult

Focus groups are facilitated group interviews with a small group of individuals selected to represent either a stakeholder perspective or the diversity within a given community used to gather information and discuss a particular issue.

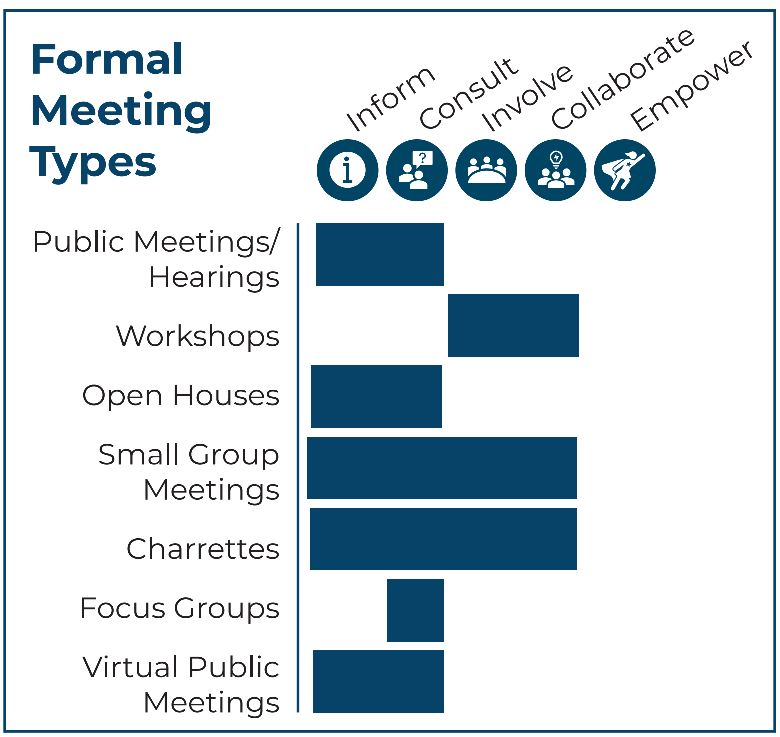
- Consider the needs of participants when determining meeting time and location.
- Several focus groups can be held in one day to accommodate multiple groups.
- Consider what participants will need to know to participate in a discussion.
- Set a clear objective for the information you gather.
- Determine how input will be recorded (ex. Tape recorder, scribes, flip chart, etc.).
- Provide refreshments.
- Provide participants a clear and transparent explanation of the purpose of the meeting and how their feedback will be used.

Virtual Public Meetings

Level of participation: inform and consult

Virtual public meetings are used as an alternative to face-to-face meetings. They take place over the internet allowing participants to view project information and/or updates on their own schedule. Virtual Public Meetings can also be conducted as live meetings to allow participants to ask questions and provide immediate feedback to project staff.

- Make sure virtual meeting sites are available 24/7.
- Information should mirror face-to-face meetings.
- Ensure that virtual sites and live meetings are easy to access and mobile friendly.
- Provide a call-in phone number for live meetings.
- Provide staff to monitor responses and/or comments.
- Record live meetings and post to project website.
- Provide online surveys to allow participants to provide feedback.



INFORMAL PUBLIC MEETINGS

Pop-Up Outreach

Level of participation: inform and consult

Pop-up outreach is used as a direct way to engage people where they already are, using a table or booth at a high density location to provide information and get quick feedback for a plan or project. Also known as intercept outreach or “event tabling,” pop-up outreach can take place wherever people congregate—from a library or sporting event to a shopping mall or county fair. This method is often combined with a short survey, conducted verbally, or on a tablet or survey card. Best used in all phases of plans and projects.

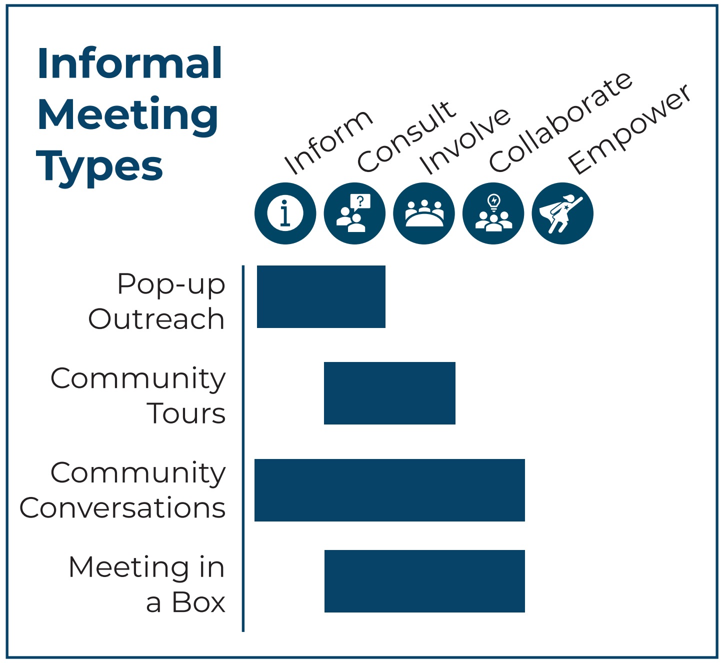
- Fairs and Events: use displays or booths that are interesting and informative, and support a local fair or event by reserving a space – great way to boost attention and get notice from media.
- Use 3-4 hours and plan event around complementary events/fairs.
- Perhaps include comment cards/wall or written summary of event to use feedback for decision-making.
- Use of fun materials (balloons, games, prizes, etc.) will make the exhibit more engaging and encourage more participation (ex: at the Census Booth at the NC State Fair they used a true/false trivia with questions about the census to encourage people to stop in and win a prize).

Mobile Tours/Field Trips/Community Tours

Level of participation: consult and involve

Tours are site visits to a particular community to get firsthand experience of community features, assets, and areas of concern. This method can also be used to allow members of the public go to a site or view a topic firsthand. Trips may involve interactive exercises or presentations.

- Create an itinerary of certain locations within project area.
- Wear proper clothing such as walking shoes.
- Take photos of the area.
- If possible, give multiple options for times and schedule far in advance.
- Provide: tour guides prepared to answer questions, transportation with provisions for physical limitations, bathroom stops, and time to debrief and answer questions at the end.



Tradeoff exercises and activities can be used as interactive elements during meetings. Refer to Appendix E for more information.

SURVEY OF COMMUNITY PREFERENCES

Engaging Diverse Communities

CEPD Community workshop participants provided the following resident recommendations for pop-up events:

- The international grocery store on South Saunders
- The Grand Asian Market
- The Hispanic grocery
- Hotdog truck near ACE hardware – good crowd, get a tent and info up next to it
- Caraleigh neighborhood near the farmer's market – they are mostly on foot, need meetings closer by
- Have a table and free coffee at the Walmart or somewhere with passersby. Bring the meeting to the people, not just long, structured meetings
- Get out in the open – host pop-ups at city parks, do outreach at sports events
- Make it social, not structured, at a bar or a restaurant so it's enjoyable and not as big a time commitment

Community Conversations

Level of participation: inform, consult, involve, and collaborate

Impromptu conversations between project staff and community members that help to establish relationships and openness. Informal conversations can reveal unknown knowledge or opinions about the project and allows project staff to remain proactive in reducing conflict or tension. This method is best used with groups that typically are not included or do not participate in traditional engagement activities, and with communities with high levels of distrust in the agency.

- Consider the needs of participants when determining meeting time and location.
- Several conversations can be held in one day to accommodate multiple groups.
- Consider what participants will need to know to participate in a discussion.
- Set a clear objective for the meeting and information you gather.
- Provide refreshments.
- Provide participants a clear and transparent explanation of the purpose of the meeting, how their feedback will be used, then follow through!
- Prepare a few targeted open-ended questions to begin the conversation.
- Be prepared to listen.
- Do not become offended or react defensively to passionate comments.
- Repeat comments to participants to verify understanding prior to writing them down.

Meeting In A Box

Level of participation: consult, involve, and collaborate

A meeting in a box provides a format for residents to gather at a convenient time and location to discuss proposed plans and projects in small group setting. Agencies provide a conversation kit with discussion questions about projects or plans for the participants in each group to consider. The kit may also include worksheets, feedback questionnaires, and directions for recording and returning responses. Agencies recruit community volunteers to serve as hosts for gatherings of 6-10 people. The meetings take place in convenient locations such as over coffee or a meal as each host prefers. This method is best used in planning and visioning phases of a project.

Consider what participants will need to know to participate in a discussion.

- Set a clear objective for the meeting and information you gather.
- Give clear instructions to participants about activity.
- Make sure questions or topics are clear and easy to understand.
- Provide a stipend for refreshments.

MATERIALS DEVELOPMENT - PRESENTATION, BOARDS AND HANDOUT GUIDELINES

Presentations, boards, and handouts can be used to convey information to the general public. Materials should be clear and free of technical jargon.

Presentation guidelines

- Present the problem and potential solutions
- Keep the silde content concise
- Include pictures and diagrams that are clear and easy to understand
- Test the presentation prior to starting
- Keep presentations brief (5-15 minutes plus Q & A)
- Ensure that the presentation content does not exceed the allotted time
- Look and face the audience
- Speak clearly
- Make sure presentation meets ADA requirements (reference in Appendix B)

Boards/Displays

- Make sure the boards and/or displays meet ADA requirements (large fonts, etc.)
- Minimize map details to include only key road and area features and use clear labels
- If a legend is used, make sure the information represented matches the visible features on the map
- Place boards/displays at eye level for easy viewing by participant
- Use graphics to make complex concepts more understandable
- Use content written at a 5th – 8th grade reading level

Handouts

- Use clear and concise (short sentences and paragraphs) written messages in plain language
- Use graphics to make complex concepts more understandable
- Use pictures of people from a broad demographic
- Make sure the font size is readable (minimum 11pt font; minimum 18pt font for large print documents)
- Use content written at a 5th – 8th grade reading level
- Use color for visual interest
- Translate handouts based on language needs of participants

ADA accessible recommendations for presentations and handouts have been compiled from multiple sources and are referenced and listed in the appendix.

SURVEY OF COMMUNITY PREFERENCES

Engaging Diverse Communities

CEPD Community workshop participants provided the following recommendations for Making Materials Easier to Understand:

- Explaining or not using jargon
- Having definitions available for those who aren't knowledgeable
- Having videos that act as a primer on complicated issues
- Using visual aids
- Explaining the real impacts of a project rather than being broad

2.8 SELECT COMMUNICATION TOOLS

A project's success is linked to the effectiveness of its communications methods directed towards the right stakeholders at the right times during the project. Communication tools provide participants the opportunity to receive information needed to participate in a meaningful way. There are two primary techniques for sharing information for a public engagement process: Awareness campaigns and information/education programs.

Appendix C outlines the most widely used communication methods and includes information on when each type is best used, the level of participation it elicits, and the resources required.

Awareness Campaigns

Level of participation: inform

Awareness campaigns are conducted to make people aware of an upcoming opportunity to be involved in an engagement process or announce a decision or action. Awareness campaigns focus on getting people's attention through limited information. Awareness campaigns are best used to announce the launch of a project or notify residents of an upcoming meeting or survey, upcoming construction, or a final decision (ex: plan recommendations).

Awareness Campaign Tools:

- Social media posts
- Press releases
- Direct mailers
- Door hangers
- Flyers
- Emails

Education Programs

Level of participation: inform

Education programs are conducted to provide the public with an understanding of a particular topic prior to solicitation of comments or participation. Education programs are best used for updates to maps and ordinances, projects involving changes to land use or transportation facilities, and provision of new services or amenities.

Education Program Tools:

- Websites
- Videos
- Fact sheets
- Blogs
- Newsletters
- Story Maps

Social media is a great tool for promoting projects to the public. With over 72 percent of Americans using at least one type of platform, social media proves to be a free way to reach a large number of people in a way that is convenient for them (Pew Research Center, 2019). Users can receive project information, updates, and participation opportunities without going out of their way to do so. Posts on social media can:

- Announce the kickoff of a project
- Invite the public to attend a meeting or event
- Inform the public of updated project information
- Provide educational resources about a project to increase public understanding
- Solicit public input on a project

PRACTICAL GUIDELINES FOR USING COMMUNICATION AND FEEDBACK TOOLS

For web pages...

Reading on screens is tiring for the eyes and people read 25% slower online, so users scan pages for relevant information. So keep it short by:

- Putting key messages at the beginning (inverted pyramid).
- Keeping it concise and direct by including one idea per paragraph.
- Breaking text into digestible "chunks" with clear, concise headings.
- Bolding relevant words and use bulleted lists to make it easier to scan for content.
- Using plain language.
- Using action words and avoid the passive voice.
- Including internal sub-headings.
- Using links or attach documents for additional information.
- Proofreading! Typos will send people away from a page.

For social media...

- Designate someone to manage and monitor these activities, even if the project is not actively participating in social media. Monitor what others post about the project.
- Use links to avoid repeating details posted elsewhere.
- Determine frequency – too often is overkill but too infrequently is ineffective. Develop a communications schedule based on the communications purpose and project timeline.
  - ◊ Event announcements: post two weeks prior and twice during the week of the event, once on the day of the event.
  - ◊ Open survey promotion: post once a week throughout the comment period and two or three times during the final week, including the day before the close and the day of the close.

When preparing any type of communications, it is important to consider the following:

- Level of complexity of the information and how the audience will receive it
- Literacy levels and primary language of the intended audience
- Audience's access to technology in terms of both logistics and skill
- How to communicate the information in a way that works best for the audience
- The different meaning of words in different communities
- Gender-specific protocols and sensitivities
- Presenting all information in a transparent way (honest, factual, easy to understand)
- Using multiple tools to deliver the information

COMMUNICATING WITH DIVERSE GROUPS

Effective communication strategies consider the diversity of the audiences that they attempt to reach. To ensure that messages reach all members of the community, it is necessary to use multiple communication tools and channels that are tailored to diverse residents. Consider using the methods described in Chart 4: Communication Methods for Diverse Groups to reach each identified group.

Chart 4: Communication Methods for Diverse Groups

Communication Method	People of Color and/or Immigrant Groups	Low-Literacy	Senior Citizens
Using minority media sources (newspapers, radio and television stations) to distribute information	✓		
Using traditional media sources (newspapers, radio, and television stations) to distribute information		✓	✓
Limiting the use of technical jargon and use simple language and graphics that are clear and easy to understand	✓	✓	✓
Providing materials and notices in languages that are most common to the outreach area	✓		
Providing printed materials and surveys			✓
Using photos that are representative of the targeted groups in materials	✓		
Asking schools, local businesses, faith-based and community organizations to distribute notices, surveys and newsletters	✓	✓	✓
Using direct mailers or door hangers	✓	✓	✓
Placing placards and digital advertising inside buses	✓		
Using short videos and social media to convey information	✓	✓	
Using large font and clear graphics in all materials			✓

2.9 COLLECT INPUT

WHAT TYPE OF DATA IS NEEDED?

In order to select the right method of data collection, you must consider the information you want to collect, at what point in the decision-making process it is needed, and the timeframe it is needed.

Step 1: Determine what information is needed

Based on the selected level of public participation, identify which aspects of the decision that the public can influence. For example, if the chosen level of participation asks the public to react to a predetermined option, it is unproductive to structure the input approach to ask the public to develop alternatives. When determining the type of information needed, do not ask the public to make decisions that are outside of their authority or level of understanding.

Step 2: Determine when the information is needed

It is always important to involve the public early on and throughout a decision-making process; however, it is necessary to know when to seek public input and when to make the needed decision. Based on the selected level of public participation and level of public influence, determine at which points in the decision-making process can the public most usefully contribute.

Based on the proposed project timeline, determine the timeframe in which public input is needed in order to be considered.

Step 3: Identify which data collection methods fit the context

Different techniques are needed at different points in the decision-making process. For example, data collection methods that are best used in visioning processes may not be effective in collecting data for final recommendations. And not all techniques will be effective in collecting data from all residents. Once you have determined the type of information needed, and the timeframe that it is needed by, it is necessary to identify which data collection methods will support each stage of the decision-making process, and will be effective based on the targeted audience.

SURVEY OF COMMUNITY PREFERENCES

Engaging Diverse Communities

CEPD Community workshop participants provided the following recommendations for notifying the public of outreach opportunities:

- Use Facebook groups
- Use #RalPol to highlight posts
- Create podcasts with short rundowns on projects
- Send emails to people interested in specific subject or affinity groups rather than emails by project
- Mail postcards/flyers
- Put mailers in utility bills
- Post signs outside and in local businesses such as grocery stores
- Create neighborhood sharing circles that will distribute meeting information by word-of-mouth
- Make use of the Raleigh TV Network
- Have apartment complexes post notification/flyer to each unit
- Distribute notices to community centers and neighborhood associations
- Distribute flyers at libraries, local coffee shops, churches, grocery stores and other places where people congregate
- Use street signs

DATA COLLECTION METHODS

There are various methods for collecting input data from groups and individuals. In order to collect feedback from a diverse group of residents, it may be necessary to use a combination of techniques including face-to-face, written, and online feedback.

Appendix D outlines the most widely used meeting types and includes information on when each type is best used, the level of participation it elicits, and the resources required. Below are best practices for the common methods used to collect resident input.

INTERACTIVE GROUP DATA COLLECTION

The following techniques allow residents to work together as a group to provide their feedback on key ideas, issues, and solutions to assist with the decision-making process.

Card Storming

Level of participation: consult, involve, and collaborate

Used to obtain input to questions from small groups/teams to capture key ideas and issues and then organizing those ideas/issues into clusters. Cardstorming can be useful for participants that are not comfortable speaking or participating in a larger group setting. Use at workshops or other public events to generate input and identify perspectives. Individuals are asked to think about a topic then write an idea per note (hopefully 4-6 different notes) then post on the wall. Participants are then asked to sort cards by themes.

- Conduct in discussion table format.
- Give clear instructions to participants about activity.
- Make sure questions or topics are clear and easy to understand.
- Have each individual write their ideas down on (sticky notes, 3/5 cards, etc.).
- Provide opportunity for individuals to report to table group.
- Select a team spokesperson for placing table ideas on provided sticky wall or flip chart and reporting to larger group.
- Have a facilitator and scribe to take notes during group discussions.
- **Resources Required:** Meeting venue, sticky wall or flip charts taped to wall, sticky notes and marking pens, theme cards, facilitators for each table.

Deliberative Polling Process

Level of participation: involve, collaborate, and empower

A deliberative polling process is a structured process that allows participants to explore a specific issue or topic and then present their opinion after considering the pros and cons. The results are then used as a guide to what the general public would think if they were given the opportunity to become more informed. A representative sample of the population is selected, based on gender, race, education and socio-economic background. Participants fill out a questionnaire on their opinions on the issue and are then invited to gather for a few days to discuss the issues. During the meeting, participants are provided with unbiased background material and information provided by subject matter experts and/or policy makers. Participants are then asked to discuss the issues in small groups with trained facilitators. After this deliberation, participants fill out the original questionnaire again. Deliberative Polling is best used to discuss complex issues which the public knows little about.

- Randomly select a group of participants that are a representative sample of community, based on gender, race, education and socio-economic background.

- Prepoll the community to create a baseline to compare results of the deliberation.
- Clearly define how the deliberation process fits into the decision-making process and obtain clarity from decision-makers about the extent that the deliberative process can influence the decision to be made.
- Plan enough time within the overall engagement process to plan and implement a deliberative process.
- **Resources Required:** Large meeting venue, speakers, staff facilitators, independent moderator, information materials, flip charts and markers to record table comments, A/V equipment for speakers and presenters, participant stipend, refreshments.
- For More Information: Stanford University Center for Deliberative Democracy, What is Deliberative Polling? https://cdd.stanford.edu/2015/deliberative-polling-1-pager/

Nominal Group Technique

Level of participation: consult, involve, and collaborate

Structured small-group discussion to develop a set of priorities for action. This technique can be combined with forums or workshops – use when group is not easily generating ideas or working together. This encourages participation from all group members and prevents domination of the discussion by an individual. This technique can be used to create a set of prioritized solutions or recommendations that represent the group's preferences.

- Explain purpose and procedure of the meeting.
- Provide clear instructions for the activity and participant roles.
- Have each participant write down their ideas for each question.
- Provide opportunity for individuals to report their ideas to the group and write them down on the flip chart.
- Allow time for the group to discuss shared ideas for clarity before voting and ranking.
- Ask participants to vote and rank the recorded ideas, prioritizing them in relation to the original question.
- Document results.
- **Resources Required:** Staff to facilitate voting and discussion, paper and pens, flip charts and markers to record ranks, votes, ideas.

Study Circles

Level of participation: consult, involve, and collaborate

Study Circles are a small group process where a diversity of participants from a particular geographic location meet as separate groups several times to discuss critical issues using a structured process where each session builds on the one before it. All circle groups use the same process information and work on the same issue to seek solutions for the whole community. At the end of a round of study circles, all participants may come together at a large meeting to work together on the action ideas from the different circles. Study circles are used to engage many diverse people on an issue without having them meet at the same time and place to uncover areas of agreement and common concern.

- Rounds of circles can take up to 2 months and include input from 10-50 circles of 8-12 people.
- This process could be used to supplement or be used instead of community advisory groups.
- Develop and clearly define a coordinator role and identify a coordinator to work with each circle.

- Develop a plan that includes program goals, geographic scope, plan for recruiting diverse participants, resources needed, how participant feedback will be used and how to report results.
- Recruit participants that reflect and represent the identified community.
- Identify and select a facilitator for each circle that reflects the community's diversity and will be viewed as impartial.
- Locate a secure venue(s) for each circle to meet.
- Document the process, comments and results of each study circle meeting.
- **Resources Required:** Staff to coordinate circles, participant facilitators for each circle, meeting location(s), promotional/ recruitment materials, discussion materials, language translators, childcare, and refreshments, flip charts, markers and pens to record comments.
- For more information: What Works: Study Circles in The Real World (October 2, 2003) https://www.everyday-democracy.org/resources/what-works-study-circles-real-world

Incorporating demographic questions into surveys and comment forms allows the agency to track descriptive statistics about who is responding in public participation efforts and which communities have yet to engage.

INDIVIDUAL DATA COLLECTION

The following methods can be used to collect feedback from individuals using in-person and online techniques.

Interviews

Level of participation: inform and consult

Interviews are structured conversations conducted between a facilitator and one or multiple participants. These are best used to build rapport with stakeholders, to learn individual perspectives, or to identify issues or concerns.

- Can be conducted as individual or small group meetings.
- Set a clear objective for the interview and information you gather.
- Create a list of questions based on interview objectives that are straightforward and easy to understand.
- Provide participants a clear and transparent explanation of the purpose of the interview, how their feedback will be used, then follow through.
- Document responses verbatim, or record and transcribe interview responses (obtain participant permission to record).
- **Resources Required:** Interview script with questions, pen and notebook to document responses or a voice recorder, refreshments for participants.

Comment forms

Level of participation: consult

Comment forms are printed or online forms used to collect input regarding preferences, concerns, or to evaluate the process. These are best used to provide an opportunity for less vocal participants to share their views.

- Can be shared on websites, social media pages, or an email link, and distributed via mail, or in person at meetings or other engagement activities.
- Include optional questions for providing geographic location, demographics, and signing up for project updates.
- Design the form to obtain input that is useful to the decision-making process – don't just ask for "comments"
- **Resources Required:** Printed comment forms

Surveys

Level of participation: consult and involve

Surveys are structured list of questions to obtain specific information from a particular group of people. These are best used to obtain the opinions of a large group. Surveys should not be used in cases where a relationship with the public needs to be established, or when the objectives for data collection aren't clear.

- Can be conducted online, phone or in person, and distributed via postal mail, social media, or an email link.
- Determine how the data will be used prior to developing questions to avoid collecting unnecessary or unusable data.
- Create questions that are straightforward and easy to understand.
- Test questions to make sure that they aren't biased or leading. (Reference 3.2 Survey Planning and Implementation: Survey Ethics.)
- Provide respondents a clear and transparent explanation of the purpose of the survey, how their feedback will be used, then follow through!
- **Resources Required:** Online survey tool and/or paper form, Staff reviewer.

Interactive Maps

Level of participation: inform and consult

Interactive maps are online maps that are used to collect location specific data. Interactive or "crowdsourced" maps allow participants to click on a map to point out the locations of problems, unmet needs, or potential improvements. Agencies can choose from a variety of ready-to-use mapping platforms at different price points or create a custom tool to meet specific needs. These platforms typically allow users to add symbols and a descriptive comment; some also allow them to upload photos and respond to other people's comments, enabling dialogue among participants. Best used in visioning or scoping phases of a project.

- Map links can be posted to (or embedded in) project websites and distributed through social media or an email link.
- Ensure that the selected platform is mobile-friendly and doesn't require participants to login to provide their feedback.
- Provide clear instructions for participants on how to submit feedback using the map data collection features.
- **Resources Required:** Online mapping tool

2.10 USING AND MANAGING PUBLIC INPUT

The next step in the public engagement planning process is to determine how the data collected from the public will be used in the decision-making process, how the data will be managed, and how results will be communicated to the public.

STEP 1: Based on the selected level of public participation, determine and document how public input will be considered in the decision process.

STEP 2: Develop a method for compiling and managing public comments.

- Prior to collecting information, create a comment management system to track and analyze the data. Identifying a comment management system and the appropriate data fields during the planning process will provide a consistent method for collecting data and will simplify the data entry and analysis process.

STEP 3: Determine how and when results will be communicated with the public.

Communicate to participants how their input affected the decision, a process for reporting on the participation and feedback received and how the decision-maker will address comments is needed. To develop an appropriate process, consider the following:

- How will participant questions be responded to? (ex. Individually in writing, FAQ lists, etc.)
- How will the feedback loop be closed? (ex. Comment summaries, newsletters, etc.)

2.11 DEVELOP PERFORMANCE MEASURES

The final step in the public engagement planning process is the development of performance measures. Performance measures are methods used to analyze and evaluate the effectiveness of a public engagement process. Evaluation allows the agency to learn from each engagement experience to improve outcomes both throughout the process and to inform future engagement projects.

It is important to plan for evaluation before the public engagement process begins so that the appropriate data needed to conduct the evaluation is collected throughout. Once engagement begins, it is difficult to effectively determine what adjustments should be made to improve outcomes based on what has been done if there is no basis for measuring success or failure.

The benefits of evaluation include:

- Demonstrates the value of engagement to all stakeholders and decision-makers, and justifies the resources spent.
- Provides an understanding of what works, what does not work, and why.
- Ensures that successes are built upon and mistakes are not repeated.
- Adapts an ongoing engagement process to increase its effectiveness.
- Captures learnings to help plan future engagement processes.
- Ensures that engagement processes are meeting all regulations and guidelines.

Evaluation can be quantitative (e.g. the number of people involved in the process) or qualitative (e.g. feedback from community members about whether they felt they had been listened to). A robust evaluation process will also include input from participants in the engagement process.

WHAT SHOULD BE EVALUATED?

There are two main aspects of the engagement process that should be evaluated: the process and the results.

Evaluating the Engagement Process	
The Process	**The Results**
The process is the methods and tools used to implement the engagement plan. It involves examining and documenting the project's activities and processes.	The results are the outcomes of the engagement process. This involves the results' analysis of the engagement process in comparison to the stated engagement goals and objectives. Methods should measure impacts over time.
To evaluate the process, develop methods to assess: • If the public engagement approach is relevant and realistic for the stage of the decision-making process. • What information is being shared with the public, how it is being shared, and if the information is receiving the appropriate attention. • If all desired stakeholders are involved, and if not, who is missing? • If participants represent a diversity of the interested and impacted public, and if not, who is missing? • If the selected tools and techniques are appropriate for the selected level of public participation and participation goals.	To evaluate the results, develop methods to assess: • If the outcomes are a direct result of the public engagement process. • If the decision was influenced by public engagement. • If the public is satisfied with the level of influence on the decision-making process that they were given. • If the overall results of the process justify the resources spent. • If the lessons learned can be used in future engagement processes.

Other considerations include:

- How much learning occurred?
- Did participants leave the process feeling better informed and able to participate in future processes?
- Did the project team learn things from the participants that resulted in better outcomes?

HOW TO EVALUATE

Step 1: What is success?

Select the areas of the engagement process that are important in demonstrating the success of your approach. Next, identify specific results for each area listed below that will help to measure performance.

- Public engagement goals including equity goals
- Level of public involvement
- Participation objectives
- Communication objectives
- Engagement regulations and guidelines

Step 2: What will be used to measure success?

Select appropriate performance indicators that are observable (ex. changes in public attitude) and/or measurable (ex. total number of participants) to identify if the desired outcome for each area has been achieved.

Step 3: How will the data be collected?

Once you know what should be measured, identify how the data needed for measurement will be collected and how it will be used to evaluate the identified performance indicators. Example evaluation data collection tools include: project team debriefs, participant feedback forms, interviews, exit surveys.

Step 4: What does the data mean and how will it be used?

Determine how the results of the measurement data will be interpreted and presented.

Evaluations should be conducted throughout the implementation process (ex: after each outreach activity and phase, comment period midpoints) to confirm that engagement goals are being met and that the process stays on course. This can be accomplished by obtaining feedback from project staff and participants and using the input to adjust the engagement process as needed.

III. IMPLEMENTATION

After a public engagement plan has been created, it can be implemented through outreach efforts like public meetings and surveys. These efforts provide crucial public input through community participation that shapes decision-making. However, engagement planning does not stop once in the implementation stage. Collaborating with other departments within your organization, coordinating logistics of public meetings, and developing a survey all require planning to ensure they effectively reach your community and create effective opportunities for public participation and feedback.

AVOID DUPLICATION OF ENGAGEMENT EFFORTS

When planning to conduct engagement activities, it is important to identify other city departments conducting engagement to align efforts and avoid duplication. Contact other departments at the start of your public engagement process to discuss the project and outreach plans and determine if they have any past experiences with the communities you are trying to engage, or are aware of specific stakeholders that should be contacted.

It is also helpful to identify any upcoming outreach conducted by other departments and any opportunities to collaborate to prevent participant burnout.

Likewise, if someone else from your agency does a project in the same location, your knowledge may be useful to their project. The sharing of project insights and stakeholder lists enables coworkers to pick up where you left off, and the contact will still be engaged with the organization even if not directly with you.

3.1 MEETING PLANNING AND IMPLEMENTATION

MEETING LOGISTICS

Proper planning for the logistics of community engagement activities is critical to sufficient resident turnout and participation. Consider the following logistical issues when preparing to conduct any type of public meeting.

LOCATION

Hold meetings in locations that are geographically close and familiar to communities or stakeholders. If possible, choosing a location within the study area is best because it creates a convenient, relevant location for residents to get to and makes travel easier.

RESOURCES

Consider what types of resources are needed for successful engagement. Depending on the stakeholders, you may need language services, refreshments, or childcare. Depending on your meeting type, you may have venue fees or need additional or specialized staff. Also determine what outreach supplies and equipment are needed to effectively advertise and conduct outreach activities, and to collect feedback.

REFRESHMENTS

Refreshments foster a more relaxed setting. Providing food at a meeting can be a way to increase meeting attendance. It allows parents to pick up their child and come directly to the meeting. When people go home first to eat, their willingness to attend a meeting may wane and they may remain at home. Often having a meal at a meeting provides neighbors an opportunity to get together and becomes a reason to attend the event. When choosing refreshments, make sure that the refreshments offered are appropriate for the time of day, and fit the budget.

TIME

Consider holidays (especially non-Christian holidays), other community events and activities, day of the week, and time of day when planning meeting dates and times to best accommodate the diverse socio-cultural characteristics within any given community. For example, evening meetings may not suit young families and the elderly, and Wednesday evening meetings may conflict with religious services. It is important to provide alternatives to ensure representative participation of any community.

BUDGET

When choosing an engagement method, you conduct an honest assessment of available resources and funding that can be allocated to outreach and engagement activities. Is your budget adequate to provide resources for materials printing, advertising, communication, venue and/or equipment fees, refreshments, translation/interpretation, and childcare?

STAFFING

Consider staffing availability when scheduling meetings. Who will provide staffing to help with meeting setup and breakdown, station management, and/or meeting facilitation? Do you have available staff that can attend weekend or evening meetings?

The selected engagement strategies should match the resources available. In some instances, an assessment to identify resources is needed to keep public engagement activities moving forward and smoothly. Making adjustments to funding sources, internal staffing, and/or outside consultants may be needed to assist in achieving the engagement goals.

What should be considered when researching a meeting venue?

Check for ADA accommodations at the meeting venue. Make sure that the space in which the meeting is being conducted is accessible via wheelchair. If the building has many steps at the entrance without a ramp, or the room of the meeting is an auditorium-style room with little space at ground level, it may not be the best choice for venue as it can prevent individuals in wheelchairs from attending.

Similarly, consider acoustics and ADA accommodations for sight/hearing. Is there a presentation or handout with written information for those hard of hearing to follow along with?

Ensure that room capacity limits are large enough for estimated attendance. Do not book a room that can hold 50 people at capacity for a large public meeting with a presentation. Also consider the style of meeting when considering capacity. An open house where participants visit stations, ask questions, then come and go as they please may not need as high of a capacity limit as a meeting where participants sit for a presentation. Another factor to consider with capacity limits is the size of the study area population.

Some meeting locations may be controversial and discourage residents from attending. For example, while churches often can accommodate a number of people, those that are not religious, or are of a different faith than the church, may feel uncomfortable attending a meeting there. Also consider using venues that provide single-use bathrooms.

SURVEY OF COMMUNITY PREFERENCES

Engaging Diverse Communities

Resident Recommendations for Handicapped Accessibility:

For physical accessibility, there is a difference between legal and practical accessibility. To accommodate physically handicapped residents, consider posting temporary signs pointing to the accessible entrance, and posting a picture of the location on meeting notices to make the location more familiar.

Cost is also significant when choosing a venue. Recreation centers at local parks may be a great option to host the meeting/event because they are not controversial, usually accessible, and can be low cost due to the potential waiving of rental fees.

It is also important to be aware of the transportation options available to get to the event. Does transit service run nearby? Is there enough free parking for all attendees? Is it a central location to the study area that many people affected by the project could get to quickly by walking, bus, or car? Also ensure that parking is close by the meeting location, both for convenience and for ADA purposes.

Meeting Preparation Checklist

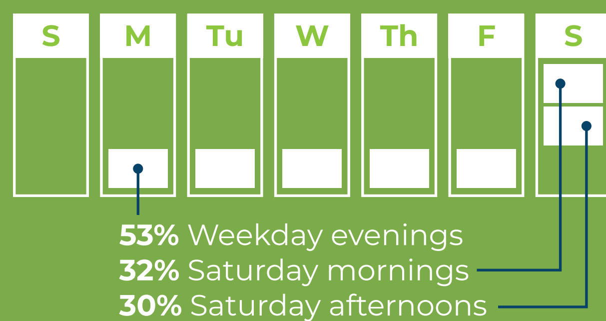
A meeting preparation checklist can help ensure that all required materials are prepared and collected ahead of a meeting. Refer to Appendix F: Meeting Preparation Checklist for a sample checklist.

SURVEY OF COMMUNITY PREFERENCES

A survey was conducted as a part of the CEPD Study to identify City of Raleigh residents' preferences for future City Planning public engagement. A total of 825 people participated in the online and paper survey. The survey asked about past experiences with City Planning outreach activities and events as well as what would make them more likely to attend in the future. Below is a summary of the results.

Which amenities would make you more likely to attend a public meeting?

When would you prefer to attend a project meeting or other City event?



MEETING PLANS AND LAYOUTS

What is a meeting plan?

A meeting plan is an internal document that outlines how an in-person or virtual meeting will be conducted and what resources are needed. It serves as the meeting agenda and instructional guide for carrying out the meeting. Meeting plans should be created prior to each event and used to provide meeting staff with instructions for meeting setup, staff assignments, and group activities. Meeting plans should include the following information:

- Date, time, and location of the meeting
- Meeting purpose
- Meeting format overview (refer to meeting type chart)
- Station descriptions or agenda outline with descriptions
- Meeting materials
- Staff assignments
- Supplies and equipment needed
- Floor plan setup schematic

If conducting a meeting virtually, include the following information in the meeting plan:

- Date, time, and location of the meeting
- Meeting purpose
- Meeting format overview
- VPM Site Sections or Agenda
- Meeting Materials

It is good practice to create a schedule for developing materials and notices for each meeting that factors in staff review time and Communications team lead times.

MEETING SETUP

When planning for a meeting it is important to consider how to set up the room to accommodate planned activities and to create a comfortable environment for participants. When deciding on the room arrangement, consider the following:

- Does the space accommodate the desired meeting format?

- How will the information be presented? (ex. Boards, presentations, videos, discussion tables, etc.)
- How much equipment is needed to present the information? (ex. Number of boards/easels, presentation podium/table, audience chairs, discussion tables and chairs, etc.)
- In what order will the information be presented?
- Is there more than one entry/exit? If so, which one(s) will be used to accommodate the desired traffic flow?
- Is there space for a welcome table?
- How will comments be collected? (ex. Comment box, electronic survey kiosk, flip charts, etc.)
- Is it necessary for participants to interact with each other? (ex. Discussion tables, group activities, etc.)

Once the space needs are determined, arrange the meeting room based on the most logical flow to present the desired information from start (entry) to finish (exit) while incorporating enough space around information areas to accommodate the number of people that you expect and to allow other participants to maneuver. When arranging meeting rooms make sure that displays are positioned to accommodate participants in wheelchairs, and that there is enough space between areas for a wheelchair to navigate.

MEETING FACILITATION

A key component of successful public engagement is effective public facilitation. Public facilitation can be defined as the act of taking people through a group process with clearly defined outcomes. It also includes encouraging participation and a group commitment to meaningful results. Successful facilitation requires communication and listening skills, credibility within the community, expertise of the project, and adequate preparation and understanding of the selected engagement tools and methods.

Room Arrangements for Controversial Meetings

For projects with a high level of community concern or low public trust, the selection, planning, and management of the meeting space is even more important and can determine the success or failure of the meeting. When planning for a controversial public meeting, consider:

- For group discussions, arrange the seating to allow participants to look at each other.
- If presenting, use a u-shape, or semi-circle setup for the audience and remove barriers like podiums and presentation tables to move closer to the audience.

Use the following steps when conducting group discussions for small group meetings, workshops, and community meeting breakout sessions.

Step 1: Prepare for the Meeting

To prepare for facilitation, familiarize yourself with the materials that will be used to conduct the meeting and any group activity instructions. Create an agenda for the meeting and print a copy of discussion points, questions, and/or activity instructions for your reference.

Step 2: Create the Right Environment

Provide plenty of space and ample seating set up in an informal manner. If possible, adjust the room temperature to a level that is comfortable for the group. Provide water and refreshments for participants. Plan for enough time for the group discussion and any needed breaks.

Step 3: Establish Expectations

Clearly articulate the meeting purpose and intended outcomes, the role of the participants, and how the feedback shared will be used in the decision-making process. Provide clear instructions for any group activities both verbally and in writing for participants to reference.

Step 4: Exercise Active Listening

As you guide participants through the discussion, do not provide your own opinions or take sides. Be patient and allow each speaker time to think about a question before responding and share their thoughts. Focus on the speaker's words and show verbal and non-verbal signs of listening. Reframe or summarize participant responses to increase understanding. Ask for clarification when necessary.

Step 5: Manage Participation

Pay attention to which group members are participating in the discussion and provide opportunities for quieter participants to share their thoughts. Rephrase the content of inflammatory or emotional statements to focus on the message while omitting negative language used by participants. Assign note taking or time keeping roles to more vocal participants to allow other participants with time to speak. Keep the discussion on track by redirecting to remain on topic or wrapping up a question to move on to the next.

It is important to challenge any repetitive negative statements or behaviors of participants during the discussion. Use the following techniques to address negative statements or behaviors:

- Move the focus away from the person by asking another participant to share their thoughts
- Change activities
- Reflect their statement back to them as a question (ex: "it always happens?")
- Ask the group for their view on the situation and then move the group forward

SURVEY OF COMMUNITY PREFERENCES

Engaging Diverse Communities

Resident recommendations for facilitating community meetings:

To help establish trust with meeting participants, Raleigh residents suggest that the City staff member should open the meeting by introducing themselves to participants and explain their role with the City and how long they have been in that role. The staff facilitator should also give a brief overview of what City Planning does as a department. Meeting materials should be made available to participants in advance of the meeting to allow them to prepare for the discussion. And staff should consider other ways to make meetings more personal and welcoming.

Step 6: Document Comments

Document participant comments using note takers. Allow participants to review comments to make sure that all comments are captured.

For large-scale meetings or projects with high levels of distrust or emotion, consider using a professional facilitation consultant.

DEALING WITH PUBLIC EMOTIONS

When the public experiences fear or anger, it is often difficult for them to effectively engage in a decision-making process. Consider using the following methods to reduce and manage public emotions during public meetings.

- Conduct small group meetings at a location within the concerned resident's community.
- Conduct facilitated small group discussions during small group or large public meetings. This will provide more residents with an opportunity to speak directly with engagement staff without being overshadowed by more vocal participants. Small group discussions also allow engagement staff to better manage any emotional scenes and prevent them from snowballing and makes it difficult for any one group or participant to take control.
- Do not conduct open forum meetings to discuss controversial decisions. If an open forum is required, then hold a pre-small group meeting with concerned residents to address issues prior to the public forum.
- Use professional, neutral facilitator or team member with credibility to be viewed as more trusted by the audience.
- Clearly communicate the meeting purpose, agenda, and decision-making process.
- Admit when a decision may not be fair to everyone involved and be fully transparent about potential impacts resulting from the decision.
- At the beginning of the meeting, provide participants the option to help establish the meeting rules.
- Inform participants that project team members will remain after to address any issues or concerns.
- If there are time constraints and a lot of participants, set reasonable time limits and treat all participants the same.
- Do not take passionate comments or negative participant behaviors personally! Remember that resident's anger just means they are passionate about a particular project/decision, they are not personally angry at you.
- Provide passonate participants with the same treatment as other participants - thank them for their comments, address any questions that they have, and document their responses.

PUBLIC MEETING BEST PRACTICES

☑ Focus on gathering information rather than just presenting prepared talking points.

☑ Ask people about their own experiences, needs, and attitudes on project-related issues, and ideas for improvements.

☑ Hold small group meetings, using facilitators and exercises to encourage interaction.

☑ Collect participants' input visibly on maps, flip charts, in comment boxes, and through documented interviews.

☑ Document and share with participants how their input has been and will be considered and acted upon by decision makers. This helps build trust and encourage sustained participation over the long term.

☑ Follow up with participants on how their input has impacted programs or plans.

SETTING MEETING GROUND RULES

The creation of ground rules is key to establishing participant expectations for group discussions. Ground rules are guidelines used to establish an acceptable code of behavior for participants during a meeting. The rules can be developed by the facilitator and approved by participants or developed by participants at the beginning of the meeting. Ground rules do not need to be created for all public meetings. However, ground rules are best used for:

- Controversial project meetings
- Meetings with participants with a history of agency distrust
- All open forums meetings
- Group discussions involving participants of diverse interests and opinions

Set aside time at the beginning of the meeting to present and discuss predetermined ground rules, or to allow participants to develop a list of ground rules. Document the list of rules on a flip chart or board that will remain visible to all participants throughout the meeting. Examples of public meeting ground rules include:

- Silence all cell phones
- Let everyone participate
- Don't interrupt others while speaking
- Listen with an open mind
- Respect other's point of view, even if it is different than your own
- Respect the groups' time and keep comments brief and to the point

3.2 SURVEY PLANNING AND IMPLEMENTATION

Surveys are an efficient way of collecting public input for projects. However, proper survey planning and design are necessary to ensure that surveys are completed by the target audience and collects data that is relevant to the decision process.

SURVEY PLANNING

Step 1: Develop Survey Objectives

The first step to creating a successful survey is to develop specific objectives based on the types of data that are needed to make the decision.

Step 2: Identify the Targeted Audience

The survey participants should be representative of the area being studied and survey results should not only describe the opinions of a select group (American Association for Public Opinion Research, 2020). Having only a select group respond to a survey is a potential source of bias to the results (Kelley, Clark, Brown, & Sitzia, 2003). Knowledge of the outreach area's demographics will help to guide the planning for survey outreach, including locating all members of the population that should be asked to participate. The demographics should then be used throughout the comment period to measure survey representation success and determine if additional outreach efforts are needed.

SURVEY DESIGN

Public surveys should provide participants with enough information to appropriately respond, while brief enough to hold their interest. Creating a positive user experience for online or paper surveys will help reduce misinterpretation of questions and participation break-off, making a survey's results more accurate and successful (American Association for Public Opinion Research, 2020).

A well-designed survey should include the following components:

- A description of the survey and its purpose, and identification of the agency/department administering the survey.
- The estimated amount of time it takes to complete the survey.
- How the results of the survey will be used.
- A note that participation is voluntary.
- A privacy statement that informs participants that the information they provide will not be shared.
- A description of the benefits or risks of participating, if any.
- Contact information for the project team.

Adequate information should be given regarding the survey description and purpose, but this information does not need to be excessive. The amount of information given should not unnecessarily extend the participation time (Sudman, 1998). To ensure voluntary participation, the survey should allow participants to skip questions or withdraw from the survey at any time (Webster, 2017).

An easy to understand and successful survey:

- Has clear instructions and headings to make the survey easy to follow.
- Avoids two questions in one (i.e. "Do you like sidewalks and crosswalks?") where a participant might like one but not the other.)
- Uses closed questions (like multiple choice) for questions with known responses. It is also important to use closed questions when there are only so many answers a person will be able to choose between. For example, don't make an open ended question for "What would you like to see happen at this intersection?" if there are only two possible options for changes.
- Uses open ended questions (like short answer questions) for questions where the answers are unknown or numerous.

- Has questions numbered and clearly grouped by subject.
- Avoids using technical language and jargon.
- Includes explanations of unfamiliar concepts and terms.
- Avoids use of all capital letters.
- Does not require online survey participants to login to submit their feedback.

SURVEY ETHICS

It's crucial that surveys adhere to ethics to receive higher quality data. Without this consideration, survey responses may be skewed or biased and therefore not be an accurate representation of the population's perspective. Using an ethical approach to survey writing ensures each participant has a fair opportunity to provide feedback without misrepresentation. Ethical surveys help capture accurate data and make participation not only fairer, but more worthwhile for the participant.

Here are some tips to consider for writing an ethical survey.

Clearly state the survey's purpose

A critical part in writing an ethical survey is letting the participant know what the survey is for and how their feedback will be incorporated into the decision-making process.

This statement should be concise and clearly state the survey's intent and how the input will be used.

The purpose statement should also mention confidentiality and guarantee that respondent's personal information will not be shared in any summaries or reports without their permission. You may also choose to let participants remain anonymous throughout the survey.

Ask specific and unbiased questions

Asking specific questions is a key part of creating relevant survey content. Specific questions should focus on a particular issue that requires feedback on and that can guide project decisions. Questions that clearly address a topic are more effective than vague questions and limit staff's need to infer what was meant by a particular response. Refer to Chart 5: Survey Questions to Use for examples of how to use survey questions effectively.

One of the hardest parts of survey writing is formulating questions that are unbiased. However, this is also one of the most important parts of survey writing. Biased questions skew data and produce unreliable results that cannot accurately be used to draw conclusions. Refer to Chart 6: Survey Questions to Avoid for biased question types to avoid when composing a survey.

Make all participation voluntary

Giving a respondent the option to skip any question they do not wish to answer is another important part of ethical survey design. Sometimes, participants may not wish to share their answer to a question due to personal reasons or simply not having an opinion on the issue. Whatever the reasoning behind it, it's crucial to allow respondents to skip a question if they do not feel comfortable. Requiring an answer may cause participants to drop out to avoid answering or they may put a response that does not truly represent their perspectives, skewing results.

Leave the survey open for a reasonable amount of time

When planning for a survey it is important to decide how long the survey should remain open for comment. Include the deadline for comment in the survey's description. The comment period length will vary based on the project, however,. it's best to leave it open for enough time for people to hear about the survey and take it, but not so long that the project is moving on and the survey is still collecting old data.

Leaving your survey open for an extended period of time expands access to the survey and allows for those that are interested to have ample time to participate. It also gives engagement staff the chance to continue outreach and increase participation throughout the life of the survey. With shorter time spans to take surveys, some may hear about it too late into the process and feel they do not have enough time to respond.

Give the option for paper responses

Some participants may prefer to answer surveys on hard copies rather than online. Provide ample opportunities for those that prefer this method to participate via printable surveys through mail, email, or in person at project meetings or events. If using a method other than emailing to collect completed surveys, be sure to include a return address and postage to reduce participation barriers for those that prefer paper to online.

Providing alternatives to internet participation removes barriers to involvement that may stem from lack of Wi-Fi or technology access. This allows for more representative outreach than strictly online surveys.

Chart 5: Survey Questions to Use

USE	Description	Example
Mutually exclusive, exhaustive options for close-ended questions	Answer choices should cover all possible options without overlap so the respondent's answer is clear.	Ex: What is your age? • Under 18 years old • 19-25 years old • 26-34 years old • 35-44 years old • 45-54 years old • 54 years old or older
Close-ended questions	If there are limited alternatives for a decision, do not ask open-ended questions for what the respondent would like to see. Keeping the responses relevant and closed will eliminate confusion and irrelevant answers.	Ex: Which proposed community center design do you prefer? • A • B • No Preference • Neither
Comments after questions	This allows participants to include additional information to supplement close-ended questions.	Ex: Please provide any comments about question 2 below.

Chart 6: Survey Questions to Avoid

AVOID	Description	Example
Double-barreled questions	These ask about two things in one question. Respondents may feel differently about the two options, but this type of question makes their perspective unclear.	Ex: "Do you like the proposed sidewalk and the creation of a bike lane? • Yes • No
Leading questions	These questions use overtly positive or negative language to encourage a respondent to answer a particular way. These questions will create biased results.	Ex: Do you support the beautiful new addition to the parkway? • Yes • No
Loaded questions	These questions include assumptions about the participant and require them to answer in a way that may not align with their actual opinions.	Ex: What do you love about the new median design?

3.3 COMMUNICATIONS TOOL IMPLEMENTATION

SOCIAL MEDIA POSTS

As more people have adopted social media use, the demographics of users has become more representative of the American public. Age as a demographic continues to show the most difference in social media usage with 90 percent of 18- to 29-year-olds using at least one platform in comparison to 40% of those 65 and older (Pew Research Center, 2019).

While social media can be extremely useful for reaching the public, social platforms present a great deal of information to each user and project information can get lost in the mix. Eye-catching posts and targeted ads can help project information stand out and increase the efficacy of this versatile tool.

How to Create Eye-Catching Posts

Simplicity and brevity are the two key elements to effective social media posts. The message should be short and convey only the most important information. Links to a project website or survey can help reduce the information needed, as interested audience members can click to learn more. Include a call-to-action on every post to make sure the audience knows what their next steps should be.

Social media posts should always be accompanied by an image, graphic, or video. Posts with visual elements have a significantly higher engagement rate than those without them.

Targeted Advertising

Many social media platforms offer an option for targeted advertising. Targeted ads use the data collected from individual behaviors online to assign characteristics to those individuals. When those characteristics are chosen for a new targeted ad, the ads are served to the individuals who have previously met that criteria.

SOCIAL MEDIA BEST PRACTICES FOR VISUALS

- ☑ Use City of Raleigh brand colors
- ☑ Use strong contrasting colors; make sure the text color can be seen on the background
- ☑ Use color, white space, or sizing to draw someone's eye to a particular piece of information
- ☑ Use consistent and easy to read fonts
- ☑ Use pictures that show the demographic diversity of the audience
- ☑ Limit text on images/graphics to the bare necessities; when in doubt, use the post itself to convey important dates, links, and messages rather than adding it to the image/graphic
- ☑ Research the best sizes for images/graphics; as each platform changes, so does the best size for posting
- ☑ Create videos that are no longer than 3 minutes when possible
- ☑ Include closed captioning or subtitles on videos so that the content can be understood without sound

Targeted ads can reach people based on their location, demographics like gender and age, income, personal interests, and more. When choosing the audience, it is important to make the criteria as specific as possible. Limit the audience to the specific age-range, location, and interests that might apply.

The first step to creating an effective targeted ad is to determine who your intended audience is and which platform will best reach that audience. While Facebook is the most commonly used social media platform, other platforms might be more appropriate for reaching your intended audience. For instance, Instagram tends to be more popular with non-whites and young adults that are 18- to 29-years-old (Perrin & Anderson, 2019).

The Pew Research Center is continually updating their statistics and can provide the most up-to-date information on social media usage. For more information visit the Pew Research Center website at https://www.pewresearch.org/ and search for "Social Media Fact Sheet."

The second step to an effective targeted ad is tailoring the ad design. Targeted ads should be just that: individualized for the intended audience. Use images, graphics, and messaging that appeals to that specific audience rather than a generic message that may appeal on a larger scale.

At the end of the allotted campaign time, review the ad insights. While the reach of a post can be an exciting metric, it may not be representative of the ad's success. Analyze the click-through rate and cost-per-click; these metrics can say more about the ad's efficacy and what the return on investment was for the campaign.

If the cost-per-click was relatively high, do not automatically rule out social media ads in the future. Take some time to determine what might have made the campaign more effective. Was the correct audience targeted? Could the advertisement have been more visually appealing? Did the information adequately convey the importance of the message? Spending time to evaluate the analytics of individual posts and targeted ads can help reveal successful strategies and opportunities for improvement in future campaigns.

Engagement on social media promotes more engagement. Putting effort into growing a social media following and creating engaging posts will help these platforms reach more and more users. This, in turn, will result in a more informed and more engaged public in the future.

TARGETED AD BEST PRACTICES

- ☑ Include a graphic, image, or video that conveys the topic you are addressing
  - ✓ Graphics should be in branded colors and have minimal text
  - ✓ Images should show people who represent your targeted audience
  - ✓ Videos should include closed captioning for ADA accessibility and for those who are scrolling without sound
- ☑ Include a call-to-action that lets the audience know what you want them to do (ex. "Learn more!" or "Take our survey!")
- ☑ Use a concise message. Refer to Chart 7: Social Media Word/Character Count for Ads for more information.

Chart 7: Social Media Word/Character Count for Ads

Social Media Platform	Word/Character Count for Ads
Facebook	• Main text: 14 words • Headline: 5 words • Description under headline: 18 words
Twitter	• Text: 70 to 100 characters long • Hashtags: 6 characters (typically singular words)
LinkedIn	• Text: 25 words long • Articles: 19,000-2,000
Instagram	• Text: 125 characters or less • Hashtags: 5 to 9 per post, each less than 24 characters
YouTube	• Video length: 3 minutes • Title: 70 characters • Description: first 157 characters appear in search results

IV. DOCUMENTATION & REPORTING

4.1 DOCUMENTING OUTREACH

Documenting and reporting back to the public on the input received and how it was used in the decision-making process is necessary to bring closure to the engagement process. Once public feedback is obtained, it must be organized and searchable for tracking, compiling, categorizing, and analyzing in order to be used in the decision process.

PROJECT DATABASES

The first step in the documentation process is to accurately compile and manage engagement data using a database. There are many suitable database tools that can be used to compile, track, and manage large volumes of engagement data. Select the tool that works best for you. Project databases should be created at the beginning of all projects and maintained throughout the engagement process.

Before developing a database, make a list of all the data that needs to be included. Some examples of the types of data to collect include:

- Dates of contact (ex. when the interaction took place)
- How contact was made (ex. email, phone, mail, online, etc.)
- Contact information (ex. email, phone, address, etc.)
- Where contact was made (ex. meeting, online, pop-up event, etc.)

- Feedback results (ex. Comments, survey results, comment notes from meetings and interviews, etc.), and issues raised
- Meetings – Types (ex. Public open house, focus group, etc.), dates, locations, number of participants
- Demographic data (ex. Outreach area demographics, participant demographics for each activity)
- Notification information (ex. Dates sent, types, etc.)
- Participant contact information and participation record (attended meetings/ activities)

4.2 COMMUNICATING RESULTS

Reporting the results of engagement activities and project decisions builds public trust and encourages ongoing engagement. When project decisions are not communicated back to the public, or not done so in a transparent or easy to understand way, participants do not understand how their input influenced the outcome and may lose faith in the process. It is good practice to provide a report of input received by the agency and how it was used after each public comment phase of the engagement process.

REPORTING SURVEY RESULTS

To uphold the transparency and ethicality of a survey, results should be reported fully and objectively. This increases confidence in the agency by allowing the public to see the data and how it was interpreted. The final report should be distributed to all participants and posted to project websites for public viewing.

The survey report should include:

- Information that allows non-participants to understand the purpose of the survey.
- A copy of the survey questions.
- Description of how the data was collected (ex. Online survey, in person, phone interviews, etc.).
- How participants were contacted, how many people participated, and if there were any trends in demographics or characteristics of those who refused to participate.
- Results of the survey and how the data will be used in the decision process.

The conclusions of the report should be based on the data gathered during the survey and not generalized past the scope of the project or the sampled population (de Jong, Hibben, & Pennell, 2016).

Data should be summarized accurately and in a way that is easy to understand, following similar guidelines as mentioned in the Survey Design section. It is important that the report not include any information that can identify participants individually unless permission has been given (Sue & Ritter, 2012).

OUTREACH SUMMARIES

An outreach summary is a report that documents the results of outreach activities conducted during the engagement process. The summary can be used as a way to measure the success of outreach activities and can be helpful in educating the public and decision-makers about the benefits of public outreach. Outreach summaries can be composed after each phase of outreach and compiled into a final project engagement report. Outreach summaries should be completed for every project. Each outreach summary or engagement report should include the following information:

- Project overview, including purpose of outreach.
- Overview of all outreach activities, when they were held, and results of each (ex. Number of participants, participant demographics, etc.).
- Communication methods used.
- Data collection methods used for each public comment period and results of each.
- Effectiveness of techniques used.
- How public feedback was used in the decision-making process.

Outreach summaries should be written in a clear and concise manner, with limited technical jargon, and include graphics to depict data when possible. Outreach summaries and engagement reports should be distributed to all participants and posted to project websites for public viewing.

Documentation of outreach and data collected and reporting those summaries to the public are crucial to concluding an engagement process and maintaining community trust. Keeping a record of data and reporting out on it provides backing for decisions made in the future and creates a point of reference if members of the public question where a decision came from. Transparent communication of outreach efforts and their results create a more credible decision-making process and in turn, establishes stronger relations with the community.

4.3 ASSESSING EQUITY

EQUITY ANALYSIS

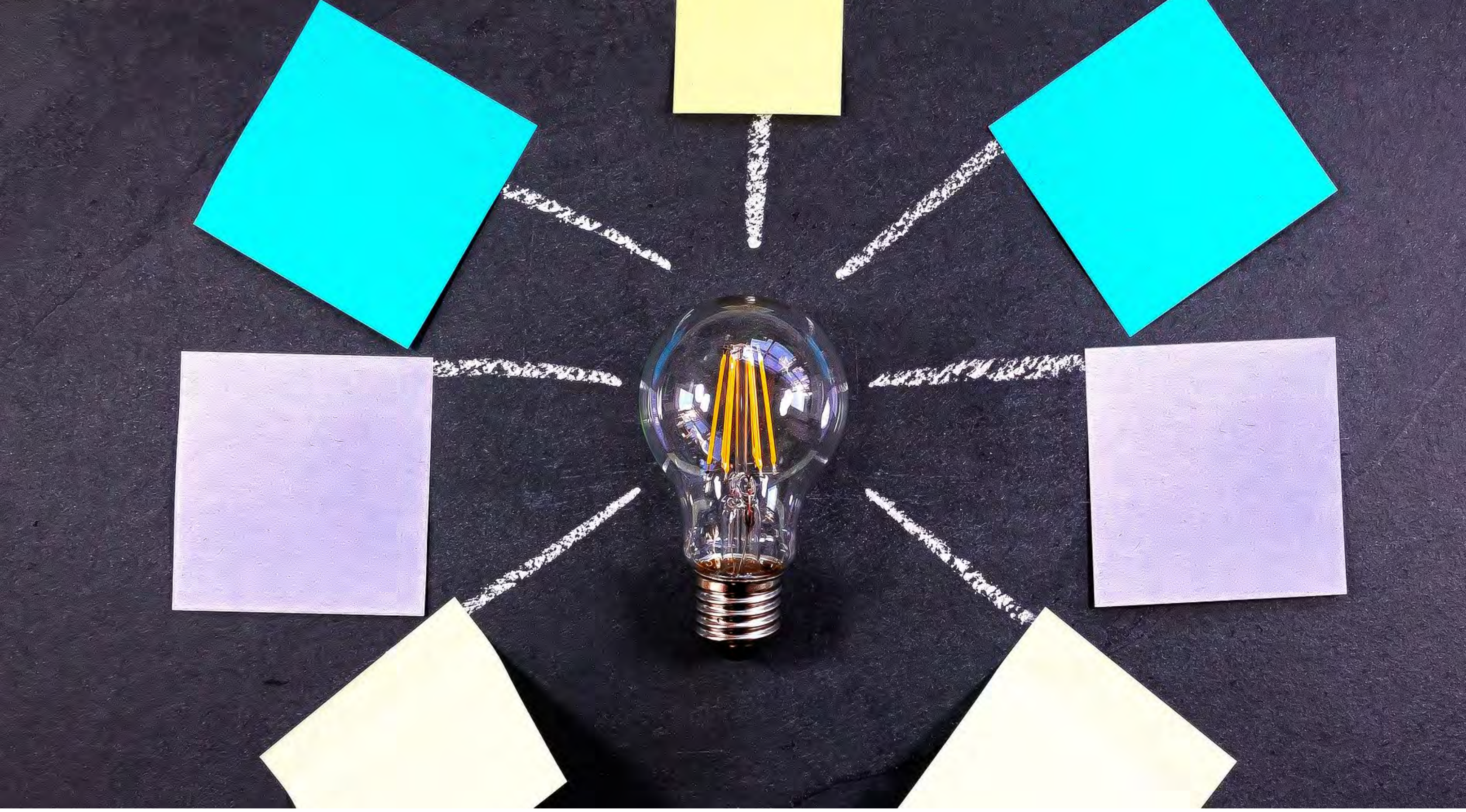
An equity analysis is an evaluation of the demographics reached during a particular phase of a project. It compares the demographics of survey or meeting participants to the demographics of the project study area. Once compared, engagement staff can identify which groups are underrepresented and can begin developing targeted outreach for future engagement activities.

Equity analyses should be conducted after each phase of a project, if not after each engagement activity. At the end of the project, each phase's equity analysis should be compiled into one document for review. This can help determine what worked well and what did not work well during the engagement of the project to inform future projects.

The first and most important step to completing an equity analysis is preparing for one; voluntary demographic surveys should be available at all public events and on every project survey. This voluntary demographic survey should contain consistent questions with consistent ranges of answers (i.e. for an age question, the ranges of ages for each answer should be the same on each survey).

QUESTIONS TO ASK DURING AN EQUITY ANALYSIS

- Which demographic groups participated the most?
- Which demographic groups were underrepresented?
- What outreach activities were conducted during this activity or phase?
- What communications were distributed during this activity or phase?
- What outreach and communication methods can I use to reach the underrepresented populations in the next activity or phase of the project?



V. SOURCES

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ADAPTED MATERIALS SOURCES

2.3 Define Public Engagement Goals and Objectives Adapted from: Doran, G. T. (1981). “There’s a S.M.A.R.T. way to write management’s goals and objectives”. Management Review. 70 (11): 35–36.

2.6 Establishing a Community Advisory Group Process table Adapted from Community Engagement Network (2005) 18, p. 15–16

2.11 How to Evaluate Adapted from: Planning for Effective Public Participation, Foundations in Public Engagement, IAP2 International Federation 2016, p.97

3.1.3 Managing Participation Adapted from: Larkins, Kim, Tips for Facilitating Groups, KSL Training, 2020

3.2 Survey Design “An easy to understand and successful survey” list Adapted from:

Kelley, K., Clark, B., Brown, V., & Sitzia, J. (2003). Good Practice in the Conduct and Reporting of Survey Research. International Journal for Quality in Health care, p. 261-266.

& de Jong, J., Hibben, K. C., & Pennell, S. (2016). Ethical Considerations. Cross-Cultural Survey Guidelines, p. 794-842.

3.3 Communications Methods Implementation: Social Media Word/Character Count for Ads chart Adapted from Shleyner, E. (2019). The Ideal Social Media Post Length: A Guide for Every Platform. Retrieved July 09, 2020, from https://blog.hootsuite.com/ideal-social-media-post-length/

4.2 Reporting Survey Results Adapted from: de Jong, J., Hibben, K. C., & Pennell, S. (2016). Ethical Considerations. Cross-Cultural Survey Guidelines, p. 794-842.

VI. APPENDIX

A. MEETING TYPES CHART

B. VISUAL DESIGN STANDARDS FOR THE VISUALLY IMPAIRED

C. COMMUNICATIONS METHODS CHART

D. DATA COLLECTION METHODS CHART

E. TRADEOFF EXERCISES/ACTIVITIES FOR INTERACTIVE PUBLIC ENGAGEMENT

F. MEETING PREPARATION CHECKLIST

G. GLOSSARY OF TERMS

A. MEETING TYPES CHART

Formal Meeting Types

Type of Meeting	Description	When It Is Best Used	Pros & Cons	Resources Required
Public Meeting *(level of participation: inform and consult)*	Large-group meetings used to educate and give residents the opportunity to ask questions or give feedback	Use when giving a chance to vent frustrations, concerns, etc. Generally last 2-3 hours	✓ Provides information to a large group of people × Does not allow for everyone to speak unless paired with small group discussions	- Staff to greet and staff to present - Flip charts and markers - Sign-in sheets - Refreshments - Presentation materials and mics - Room with chairs arranged facing presenter (chevron or semi-circle style is good)
Public Hearing *(level of participation: inform and consult)*	Meeting where participants give comments at specific times	Used to meet regulatory or legal requirements for a project	✓ Structured so that all participants who sign up have a chance to speak × Requires signing up in advance	- Agenda of meeting - Recording equipment (notes or video) - Venue with seating and microphone equipment if needed
Workshops *(level of participation: involve and collaborate)*	Public forums where participants work in small groups – usually “scripted” so everyone knows what to expect, groups report out afterwards	Sessions can run 2-3 hours and are open to public – use to foster discussion on a specific issue and get participants engaged	✓ Interactive structure allows all participants to provide input × Might need additional staff support and/or materials	- Agenda - Staff to facilitate the small groups - Venue to host - Graphic tools: maps, diagrams, etc. - Feedback tools: flip charts and markers, sticky notes, etc.

Formal Meeting Types

Type of Meeting	Description	When It Is Best Used	Pros & Cons	Resources Required
Open House *(level of participation: inform and consult)*	Informal public setting where participants can rotate through designated sections, or walk around and ask questions to staff	Before holding public meetings, workshops, etc. This improves public understanding about a project.	✓ Allows participants to view information at their own pace × Requires enough staff for all stations, may not receive as much feedback	- Comment form - Sign-in sheet - Easels - Signs identifying stations - Open space floor plan - Enough staff for all stations
Small Group Meeting *(level of participation: inform, consult, involve, and collaborate)*	Small-group meetings used to educate and give key stakeholders the opportunity to ask questions or give feedback	Used to discuss issues and/or concerns about a particular topic	✓ Small groups are less intimidating for providing feedback × Only gathers perspectives from a small group	- List of questions/ script - Staff to facilitate and record comments - Info material - Refreshments
Charettes *(level of participation: inform, consult, involve, and collaborate)*	A working meeting or series of meetings to generate ideas, scenarios, alternatives, and plans for a decision involving urban design and planning	Use when there's time for longer meetings. Charettes typically meet multiple times over the course of multiple days. Use to conduct discussions about planning techniques.	✓ Interactive meetings can reach all levels of participation × Requires a large amount of time over more than one day	- Facilitators or specialists - Computers / design software - Flip charts, boards, markers, sticky notes, etc. - Large space for small groups to work - Refreshments
Symposia *(level of participation: inform and consult)*	A meeting with different speakers to discuss a topic	Used to provide expert opinions and information on the project	✓ Educate a large group of people × Not interactive	- Experts to speak on issue - Venue with lots of seating for large group

Formal Meeting Types

Type of Meeting	Description	When It Is Best Used	Pros & Cons	Resources Required
Focus Groups *(level of participation: consult)*	One-time small-group discussion/ interview to listen to and gather information from a pre-selected group of people on a particular issue	Used to reach a diverse group of stakeholders whose perspectives might not be captured through other meeting types	✓ Interactive meetings can reach all levels of participation ✗ If feedback is required from multiple groups, may take a longer amount of time than other methods	- List of questions/ script - Staff to facilitate and record comments - Info material - Refreshments
Virtual Public Meetings (VPM) *(level of participation: inform and consult)*	An online meeting with project information and/or updates posted for a set period of time to allow for participation	Used as an alternative to face-to-face meetings and/or to allow residents to participate on their own time	✓ Allows participants to view meeting at their convenience, interactive ✗ No face-to-face interaction; requires technological access	- Online hosting platform that can be available 24/7 - Ability to host and record a live meeting, if desired - Easy-to-access platform that's mobile friendly - Staff to monitor responses and/or comments

Informal Meeting Types

Type of Meeting	Description	When It Is Best Used	Pros & Cons	Resources Required
Pop-Up Outreach *(level of participation: inform and consult)*	A booth or table at a high-density location to provide information and get quick feedback	Used to gather feedback from people who otherwise may not be reached in a location that they already frequent	✓ Meet general public and businesses/ organizations that could be partners × Requires staffing for 4-6-hour periods, may be challenging to get people's attention	- Portable table - Survey/comment cards/comment wall/boards - Pens - Project handouts/info materials including contact info - Prizes and swag
Mobile Tours, Field Trips, and Community Tours *(level of participation: consult and involve)*	Site visits to a community with staff and/or the public to view and take pictures of a topic first-hand, with time to debrief and answer questions at the end	Used to get first-hand experience of community features, assets, and areas of concern	✓ Shows staff and/or the public info and perspectives first-hand × Requires transportation and knowledgeable tour guides	- Tour guides prepared to answer questions - Transportation with provisions for physical limitations - Meeting agenda/itinerary - Notebooks and pens to document observations, bottled water, and camera
Community Conversations *(level of participation: inform, consult, involve, collaborate)*	A hosted and facilitated conversation between project staff and community members that help establish relationships	Best used with groups that typically are not included or do not participate in traditional engagement activities, and with communities with high levels of distrust in the agency	✓ Can reveal unknown info or opinions about the project × May have distrust that needs to be addressed first	- Meeting venue - Staff to lead the group conversation - Note takers - Flipcharts and markers for notes
Meeting in a Box *(level of participation: consult, involve, collaborate)*	Agencies provide a conversation kit to a participant or organization leader with discussion questions about projects for the participants in each group to consider	Used to reach groups of people who may not otherwise participate	✓ Allows for participation at convenient locations/times × Staff are not present to answer questions/clarify info	- Meeting materials - Volunteer hosts - Refreshment stipend for host and prizes/swag for participants

B. VISUAL DESIGN STANDARDS FOR THE VISUALLY IMPAIRED

ACCESSIBILITY FOR POWERPOINT PRESENTATIONS

**PowerPoint has an Accessibility Checker. Go to Review>Check Accessibility and go through the items indicated in the right-side bar.

- Include alternative text for all visuals (including pictures, SmartArt graphics, shapes, groups, charts, embedded objects, ink, and videos)[1]
    - ◊ Right click > Edit Alt Text – to edit the Alt text. Images that are redundant or add no value (decorative) do not need Alt text[2]
- Isolate important images (such as maps, graphs, charts, etc.) on individual slides and accompany them with explanatory captions[6]
- Arrange your content in reading order (Home>Drawing>Arrange>Selection Pane>rearrange items in order they should be read)[1]
    - ◊ Built-in slide layouts are automatically in the correct reading order[1]
- Add meaningful hyperlink text and ScreenTips (ex. Instead of "Click here" include the full document name) [1]
- Ensure that color is not the only means of conveying information, instead use text labels[1]
    - ◊ In the View tab, switch to Grayscale to assess your presentation for color coding[1]
    - ◊ Ex. Add an underline to indicate a hyperlink; use a bold or larger font to indicate a heading[1]
    - ◊ Add text next to or within color-coded items to indicate meaning[3]
- Use strong contrast for text and background colors[1]
    - ◊ Control brightness and contrast[5]
- Give every slide a unique title[1]
- Lists should be correctly formatted using the "Bullets" or "Numbering" features (rather than inserted characters with spaces)[3]
- Use a simple table structure and specify column header information[1]
    - ◊ If the data is more complex, consider converting to a PDF and adding additional accessibility info in Adobe Acrobat Pro[2]
    - ◊ Screen readers cannot read information in the correct order if spaces or tabs are used to separate content into columns[3]
- Use 24pt font or larger; sans serif fonts (such as Arial, Helvetica, or Calibri) [2] (sources differ, some also say that 18pt should be the smallest font size[1])
- Make videos accessible by adding subtitles, closed captions and video descriptions[1]
- Avoid animation as it can be distracting, cause screen readers to re-read slides, read parts out of order, and may not allow enough time to reach slide content[2]
- Use PowerPoint for live presentations; better to convert to PDF for posting on the web[2]
    - ◊ When saving, under Options, make sure to check both boxes for "Include non-printing information" ("Document properties" and "Document structure tags for accessibility")[2]
- Save the PowerPoint as a PDF when uploading to the web[3]

The Section 508 Basic Checklist is a good resource to use when testing a PowerPoint for Accessibility: https://www.section508.gov/create/presentations

ACCESSIBILITY FOR DOCUMENTS:

- Font Guidelines:
  - ◊ For large print documents, use at least 18pt font, preferably 20pt, bold, sans serif, mono or fixed space font[6]
  - ◊ Titles should be larger than the text and contain both upper and lower case letters[6]
  - ◊ To emphasize words, use bold, double bold, or underlining (do NOT use color or italics) [6]
- Paragraph Guidelines (for large print documents):
  - ◊ All text should be left-aligned when possible[6]
  - ◊ 1.5 line spacing (leading) [6]
  - ◊ 2.0 spacing between paragraphs[6]
  - ◊ Bulleted text identified by large solid dark bullets with double spacing between items[6]
- Low vision readers have trouble with graphs, charts, and pictures in documents. An effort should be made to isolate them on individual pages accompanied by explanatory captions.[6]
- Don't assume your readers have knowledge of the subject[10]
- Make use of white space to make pages easier to scan[10]
- Write in Plain Language:
  - ◊ Choose words that are common and easy to understand[9]
  - ◊ Avoid run-on sentences. Use clear, short sentences and paragraphs. [9]
  - ◊ Write in the active voice instead of the passive voice. [9]
    - ◊ Passive: Applications for the job were submitted by 100 people. [9]
    - ◊ Active: 100 people submitted applications for the job. [9]
  - ◊ Break documents into separate topics10
  - ◊ Use short bullets and lists to organize information[10]
  - ◊ Eliminate unnecessary words[10]

RESOURCES FOR WRITING IN PLAIN LANGUAGE:

Hemingway App (shows you your readability score and ways to improve your language): http://www.hemingwayapp.com/

U.S. General Services Administration, Plain Language Training: https://plainlanguage.gov/training/online-training/

U.S. General Services Administration, "Checklist for Plain Language on the Web": https://plainlanguage.gov/resources/checklists/web-checklist/

ACCESSIBILITY FOR SOCIAL MEDIA:

General Guidelines

- Ensure that you link to accessible content with captions, transcripts, etc.[8]
- Don't assume your audience knows what an acronym means (i.e. spell out an acronym in the first instance of its use: "Community Engagement Process Development (CEPD)")[8]
  - ◊ If there is no space in the post to spell out the acronym, consider using a different way to convey the information[8]
- Use camel case (capitalize the first letters of compound words) within hashtags (e.g. use #CityOfRaleigh not #cityofraleigh)

Facebook

- Add captions to images that describe the scene, how elements of the image appear, and provide context for the image[8]
- Add closed captioning to Facebook videos or upload to YouTube and include closed captioning (make sure to double check accuracy of the captioning!)[8]

Twitter

- When posting an image on Twitter:
  - ◊ Describe the image in your tweet[8] OR
  - ◊ respond to the original post with a description of the image and link to the original sources for image (helpful also to link to the original tweet you're referencing)[7]
- Consider indicating that a link is a photo, video or audio file (e.g. [PIC], [VIDEO], [AUDIO])[8]
- Provide recaps or Twitter Chats on a blog or webpage[8]

YouTube

- Ensure all videos have close captions and audio descriptions[8]
  - ◊ It is also useful to have a full transcript available[8]
  - ◊ Audio descriptions should be descriptive to ensure audio and visual elements are clear to those who have visual or hearing disabilities[8]
  - ◊ Good captions include:
    - ◊ Descriptions of sounds (e.g. laughter)[8]
    - ◊ Tone of voice notes (e.g. tone of music is bright and cheery)[8]
- High quality video is easier to hear/see. People who are hard of hearing may have difficulty with background music or other effects that have not been produced in high quality[8]

REFERENCES/RESOURCES:

[1]Microsoft Office Support, "Make Your PowerPoint Presentations accessible to people with disabilities": https://support.office.com/en-us/article/make-your-powerpoint-presentations-accessible-to-people-with-disabilities-6f7772b2-2f33-4bd2-8ca7-dae3b2b3ef25

[2]California Department of Rehabilitation – Disability Access Services, "Seven Steps to Creating an Accessible PowerPoint Slideshow": https://www.framingham.edu/Assets/uploads/about-fsu/accessibility/_documents/7-steps-accessible-ppt.pdf

[3]Section 508 Accessibility Guidance, "Microsoft PowerPoint 2016 Basic Authoring and Testing Guide": https://www.section508.gov/create/presentations

[4]Section 508 Accessibility Guidance, "Section 508 Basic Checklist-MS PowerPoint 2016": https://www.section508.gov/create/presentations

[5]SlideGenius, "Making Your PowerPoint Accessible for the Visually Impaired": https://www.slidegenius.com/blog/making-your-powerpoint-accessible-for-the-visually-impaired

[6]American Council of the Blind, "Best Practices and Guidelines for Large Print Documents used by the Low Vision Community authored by the Council of Citizens with Low Vision International An Affiliate of the American Council of the Blind Arlington, VA": https://www.acb.org/large-print-guidelines

[7]18F – U.S. General Services Administration, "Making Twitter images accessible": https://18f.gsa.gov/2015/03/24/making-twitter-images-more-accessible/

[8]U.S. General Services Administration, "Improving the Accessibility of Social Media in Government": https://digital.gov/resources/improving-the-accessibility-of-social-media-in-government/

[9]U.S. General Services Administration, "Federal Social Media Accessibility Toolkit Hackpad": https://digital.gov/resources/federal-social-media-accessibility-toolkit-hackpad/

[10]U.S. General Services Administration, "Checklist for Plain Language on the Web": https://plainlanguage.gov/resources/checklists/web-checklist/

C. COMMUNICATIONS METHODS CHART

Awareness Campaigns

Type of Meeting	Description	When It Is Best Used	Pros & Cons	Resources Required
Social Media Posts *(level of participation: inform and consult)*	Text, images, and/or video content posted to a social network to reach followers	Use to broaden a project's reach to those who may be interested but not directly impacted, to target certain groups who may not have participated in or heard about the project to-date	✓ Reaches people on a platform they already use ✗ Participants have to have access, skill, and an account	- Social media accounts - Staff to review and reply to comments and/or messages
Press Releases *(level of participation: inform)*	One- to two-page statement issued to media sources to solicit a news announcement	Use to notify the general public or to reach underrepresented groups (such as seniors, minorities, and those with limited English proficiency)	✓ One press release can be used for most media outlets and distributed via email ✗ No guarantee the media outlet will share on their platform	- Composed press release document - Staff to distribute via email
Direct Mailers *(level of participation: inform)*	Written material directly mailed to the public	Use to reach directly impacted residents within a project study area	✓ Reaches all addresses within a geographic region ✗ If mailer is only sent to property owner, it may not reach renters in the area	- Mailing list of addresses - Printed materials - Postage - Return envelope and postage for comments, if applicable

Awareness Campaigns

Type of Meeting	Description	When It Is Best Used	Pros & Cons	Resources Required
Door Hangers *(level of participation: inform)*	Printed material that can be hung from residences' doorknobs with information on a project	Best used when there is a large amount of renters in an area	✓ Ensures residents within a geographic region receive information ✗ Requires staff time to individually distribute	- Staff to distribute door hangers from door to door - Printed door hanger
Flyers *(level of participation: inform)*	One- to two-page designed material typically announcing an event or providing limited information; can provide URL to more information	Use to distribute info: at popups; to employees and customers of local businesses; and to ambassadors and other project partners to distribute on behalf of the agency	✓ Can be printed to display in locations or emailed for electronic distribution ✗ Flyers are sometimes easily disregarded; does not provide a lot of information	- Printed and/or electronic flyer - Email list for distribution - Staff time to physically distribute or mail
Emails *(level of participation: inform and consult)*	Electronic correspondence that can include project information, announcements, files, and links	Use to electronically distribute meeting or outreach activity instructions; use to distribute surveys, project updates, information, etc. to subscribers	✓ Reaches a large amount of people directly ✗ Only reaches those who have subscribed or emails that have been identified	- Email platform - Email distribution list

Education Programs

Type of Meeting	Description	When It Is Best Used	Pros & Cons	Resources Required
Websites *(level of participation: inform and consult)*	A digital information repository on the Internet for project information and updates	Used to create 24/7 access to project information for people who won't or can't attend meetings	✓ Can provide information and register contact info × Must be updated frequently	- Website platform - Staff to update content
Videos *(level of participation: inform)*	Digital compilation of pictures, film, and/or sound that conveys a message to viewers	Use to provide information in a captivating way for online meetings, upcoming meetings, and/or project updates	✓ Can be used with any online communication tool × Can be more time consuming to create, especially to ensure accessibility	- Film or picture content - Captions or subtitles for ADA - Host platform to view video
Fact Sheets *(level of participation: inform)*	One- to two-page document providing useful information about a project or topic	Use to address commonly asked participant questions (FAQs), to provide background info, to explain technical terms/processes	✓ Educational in nature; provides useful information for making decisions × May be difficult to condense information down to 1 to 2 pages; some people may not read entire document	- Printed and/or electronic materials - Method to distribute

Education Programs

Type of Meeting	Description	When It Is Best Used	Pros & Cons	Resources Required
Blogs *(level of participation: inform)*	Articles compiled on a singular website written in an informal style and updated regularly	Best used as a platform where participants can check for project updates on their own time	✓ Can provide updates over the course of months or years × Requires frequent updating	- Staff to write content and update regularly
Newsletters *(level of participation: inform)*	Articles concerning a specific project or location information, or updates mailed or emailed to stakeholders	Best used to convey various updates and multiple facets of project information to subscribed group of people instead of hosting additional meetings	✓ Keeps participants updated on project information × Requires monthly or bimonthly composition and distribution	- Staff time to write, design, and distribute newsletter - Printed newsletter - Email distribution capabilities
Story Maps *(level of participation: inform and consult)*	A stand-alone, interactive, linear web map that utilizes maps, legends, text, photos, and videos to convey project information	Use to communicate project designs and alternatives, provide public information about an event or project, or educate the public on a topic	✓ Interactive platform that allows for in-depth and visual exploration of project information × Requires specific software and/or technical expertise to create	- Platform to distribute link to Story Map, such as website, social media, mailers, flyers, email blasts, etc. - Staff with ArcGIS technical capabilities

D. DATA COLLECTION METHODS CHART

Interactive Group Data Collection

Type of Meeting	Description	When It Is Best Used	Pros & Cons	Resources Required
Card Storming *(level of participation: consult, involve, and collaborate)*	Individuals write down ideas about a topic and report to small group; small group chooses top 4-6 ideas; all small groups work together to sort ideas into themes	Used to gather consensus on best ideas to answer a question or solve a problem. Allows individuals to share perspectives and whole group to identify themes	✓ Can be useful for participants who are not comfortable speaking in larger groups ✗ May be hard to get through all of activity with very large group	- Meeting venue - Sticky wall or flip charts taped to wall - Sticky notes and marking pens - Theme cards - Facilitators for each table
Deliberative Polling Process *(level of participation: involve, collaborate, and empower)*	A representative sample of participants takes a prepoll before being given more information by experts; after learning more, they are asked to take the poll again	Best used to discuss complex issues which the public knows little about. Used to determine changes in perspective with more information	✓ Provides a baseline of public opinion before education ✗ Requires extra time in project schedule to plan and implement before general outreach	- Large meeting venue - Speakers, staff facilitators, and independent moderator - Information materials - Flip charts and notepads to record table comments - Participant stipend - Refreshments
Nominal Group Technique *(level of participation: consult, involve, and collaborate)*	Structured small group discussions to develop a set of priorities for action; participants share their ideas and vote or rank all ideas according to original question	Used when a group is not easily working together or generating ideas	✓ Creates a set of prioritized solutions that represent the group's preferences ✗ Requires a lot more logistical planning than other data collection methods	- Staff to facilitate voting and discussion - Paper and pens - Flip charts and markers to record ranks, votes, and ideas

Interactive Group Data Collection

Type of Meeting	Description	When It Is Best Used	Pros & Cons	Resources Required
Study Circles *(level of participation: consult, involve, and collaborate)*	Small group process where stakeholder groups meet multiple times, each meeting building off the last; all circle groups use the same process and may come together at the end	Used to engage many diverse people on an issue without all meeting at the same time	✓ Uncovers areas of agreement and common concern between groups × Can take up to two months to facilitate 10-50 circles of 8-12 people	- Staff to coordinate circles - Participant facilitators for each circle - Meeting location(s) - Promotional/recruitment materials - Discussion materials - Language translators, childcare, refreshments - Flip charts, markers, pens

Individual Data Collection

Type of Meeting	Description	When It Is Best Used	Pros & Cons	Resources Required
Interviews *(level of participation: inform and consult)*	Structured conversations conducted between a facilitator and one or multiple participants	Best used to build rapport with stakeholders, to learn individual perspectives, or to identify issues or concerns	✓ Builds stakeholder relationships and identifies individual perspectives ✗ Only gathers one perspective at a time; time consuming	- Interview script with questions - Pen and notebook to document responses or a voice recorder - Refreshments for participants
Comment Forms *(level of participation: consult)*	Printed or online forms used to collect input regarding preferences and concerns or to evaluate the process	Best used to provide the opportunity for less vocal participants to share their views	✓ Gathers perspectives of those less likely to speak during meetings ✗ Printed forms at meetings can often be overlooked or not turned in	- Printed comment forms - Staff time for compiling comment form responses and reviewing comments
Surveys *(level of participation: consult and involve)*	A structured list of questions to obtain specific information from a particular group of people	Best used to obtain the opinions of a large group of people	✓ Can gather input from a large number of people confidentially ✗ Limited opportunity to clarify questions if there is confusion; participants can get survey fatigue	- Online survey tool and/or paper form - Staff reviewer
Interactive Maps *(level of participation: inform and consult)*	Online maps used to collect location-specific information; allow participants to assign problems, unmet needs, or potential improvements to specific location	Best used in visioning or scoping phases of a project	✓ Allows for visualization and specificity of participant ideas ✗ Mapping technology can sometimes be hard for participants to navigate and/or use	- Online mapping tool - Staff reviewer

E. TRADEOFF EXERCISES/ ACTIVITIES FOR INTERACTIVE PUBLIC ENGAGEMENT

Tradeoff exercises and activities can be effective tools for interactive public engagement. These exercises and activities can be used to explain complex concepts or help participants visualize budgetary or resource constraints. As a result, participant feedback can be more informed leading to more reliable data. Below are examples of best practices for tradeoff exercises and activities.

BUDGET PREFERENCE VOTING

In a budget preference voting activity, participants are allocated a certain amount of money and shown options for spending their funds. These options might be split between different categories of needs or different priorities for a specific project. This activity is like participatory budgeting in concept.

VISUAL PREFERENCE VOTING

In a visual preference voting exercise, participants are presented with several design options, typically as an image or map. They are then asked to vote for or rank their preferred design concept.

MOVEDC "BUILDING BLOCKS FOR THE FUTURE" TRADEOFF ACTIVITY

moveDC Tradeoff Activity instructions

The consultant team developed games and activities for each phase of engagement throughout the 18-month planning process. During the middle phase of the project, participants played a game of trade-offs. Participants were given a 2"x2" gameboard and cards that represented options for using DDOT's budget. One of the four squares on the board was already filled in to represent DDOT's ongoing maintenance costs and other commitments.

Participants could choose cards to fill in the three remaining squares. Two of the remaining three squares were at no additional cost, but if they filled in the last square, they had to find a way to pay for that option. Participants needed to make difficult decisions about which improvements they wanted to prioritize. Participants could choose from options such as a comprehensive bicycle and pedestrian network, accelerated repairs, fast transit, more local transit, more bridges and tunnels, and sustainability and aesthetic improvements, among others. The cards were either a half square or full square large, depending on the resources (e.g. time, money, etc.) needed for the element.

The results of the trade-off game were priceless. The moveDC team gathered a wealth of information on what people valued and what they were willing to sacrifice to increase the amount of available resources. Like nearly every other in-person game or activity, the trade-off game was adapted into an online version to expand the reach of the process to people who were not able attend a meeting, offering many avenues for participation.

Source: Smart Growth America, "A Capitol Idea for Public Engagement", September 10, 2015. https://smartgrowthamerica.org/a-capitol-idea-for-public-engagement/. Accessed July 1, 2020.

More information and activity instructions can be found at http://www.wemovedc.org/ideasthatbuild/

ULI REALITY CHECK GAME-CHARLOTTE, NC CASE STUDY

The Game Reality Check 2050 was a unique event that brought together a large and diverse set of political, business and community leaders to envision the future of their region. In so doing, they worked with the best and most recent information available about population growth as well as existing transportation and land use resources. They decided on guiding principles, placed LEGO blocks representing growth on a board, and listed barriers to their vision along with solutions. More than 400 individuals applied and participate in Reality Check 2050. Participants included leaders from large corporations, small businesses, developers, elected officials, conservationists, and civic leaders.

At Reality Check 2050, the participants were assigned to one of the 41 tables. Each table had representatives from a wide variety of backgrounds along with a trained facilitator and scribe supporting the table's deliberation. Together, they were charged with plotting where future growth through 2050 should go, deciding where to place population, jobs and the transportation infrastructure to connect them.

The "game board" was a large-format map of the 14-county region showing towns and cities, major road and transit corridors, and protected areas, thought to encourage participants to think regionally rather than locally, all jurisdictional boundaries were intentionally omitted, although place names of cities and towns helped participants orient themselves. The map was gridded with a cell equaling two square miles. Each table's game pieces included a set of colored LEGOs used to allocate projected densities and three colors of yarn to identify roads, transit and greens space. Residential and employment densities increase as LEGOs are stacked together in a grid cell.

According to the rules of the exercise, the growth projections were not negotiable. While these numbers could be debated, experts in the region agree they are reasonable projections. Also, the projected growth represented in LEGOs were required to be placed on the map before the end of the exercise and all growth allocations were additive – that is, the growth that is allocated was considered an addition to what already exists. All the projected growth represented by LEGOs was allocated before the end of the 90-minute game board exercise.

Participants were advised to think big, keep an open mind and be bold and creative in their approach. Before positioning LEGOs on the board, teams were asked to develop their key principles to guide growth. These principles guided the allocation of growth and transportation resources symbolized by the LEGO and yarn allocations. Facilitators insisted that all views be considered and that consensus be reached before a principle could be adopted. Scribes at each table recorded the principles, which were later collected and tabulated.

The participants then placed hundreds of LEGO bricks and dozens of feet of yarn on the maps. Yellow LEGOs represented jobs, red LEGOs represented households, and yarn outlined new roads, regional transit, and green space. In a few hours, participants created principles to guide growth, understood scenarios for the year 2050 and, perhaps most importantly, gained a new understanding of the region's growth issues.

After gameplay, participants discussed the findings from the exercise in relationship to their guiding principles and defined the next steps. After the board game portion concluded, data from each table was collected by volunteers. Yellow and red LEGOs were counted and recorded on a cell-by-cell basis as was the presence of different types of land use patterns and transportation priorities of each table.

Source: ULI Charlotte, "Reality Check 2050", January 2015. Final Report, 7-8.

F. MEETING PREPARATION CHECKLIST

As you prepare for a meeting, please use the checklist below to gather all necessary materials. You should reference the meeting plan to identify exact supplies needed for a meeting. Cross out any materials not needed.

For All Meetings — For Specific Meeting Types — Miscellaneous

Project Name: ______________________

Meeting Date: ______________________

Meeting Type:

- [ ] Public Meeting
- [ ] Small Group Meeting
- [ ] Stakeholder Meeting

MATERIALS

- [ ] **Meeting Plan**
  Make a copy for each primary staff (facilitators or P3, client, and agency leads)
- [ ] **Presentation**
  Electronic and paper copy
- [ ] **Sign-In**
  Electronic and/or paper copy
- [ ] **Handouts**
- [ ] **Comment Forms**
  Used if there is a handout
- [ ] **Table Exercise Materials**
  (questions, instructions, maps, stickers, etc.)
- [ ] **Directional Signs**
  Indoor and outdoor
- [ ] **Table Signs**
  (sign-in, comment, stations, etc.)

SUPPLIES

- [ ] **Notepads**
  Used for table discussions
- [ ] **Flip Charts, Easels & Chart Holders**
  Used for table discussions
- [ ] **Black Markers**
  For name badge sticker use
- [ ] **Sticky Notes**
  For map comments and table exercises
- [ ] **Pens**
- [ ] **Kids Table Activities**
- [ ] **Refreshments/Snacks**
- [ ] **Water Bottles**
- [ ] **Hand Sanitizer**
- [ ] **Napkins, Plates, Cutlery**

EQUIPMENT

- [ ] **Projector and HDMI cord**
  (as a backup for all presentations)
- [ ] **Laptop**
  For presentation and preloaded sign-in spreadsheet file
- [ ] **Wi-Fi Hotspot**
- [ ] **Comment Box**
- [ ] **Power Strip(s)**
- [ ] **Table Sign Holders**

PUBLIC MEETING

- [ ] **Boards**
- [ ] **Easels** *(for boards)*
- [ ] **Printed Name Badges** *(staff only)*
- [ ] **Name Badge Holders** *(staff only)*
- [ ] **Name Tag Stickers**
- [ ] **Tablets**
  For comment table and with preloaded online survey

SMALL GROUP MEETING

- [ ] **Attendee List**
- [ ] **Printed Name Badges** *(staff only)*
- [ ] **Name Badge Holders** *(staff only)*
- [ ] **Name Tag Stickers**
- [ ] **Tablets**
  For comment table and with preloaded online survey

STAKEHOLDER MEETING

- [ ] **Attendee List**
- [ ] **Printed Name Badges**
  (all participants and staff)
- [ ] **Name Badge Holders**
- [ ] **Extra Name Badges**
  (blank)

Miscellaneous:

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Checklist created by Public Participation Partners, 2019

G. GLOSSARY OF TERMS

Glossary of Terms	
Term	**Definition**
Advisory groups	Provide oversight over the project planning process to ensure decisions have broad representation of the community. Advisory groups serve as an information channel between the project agency and the community. Members are selected to represent various project stakeholder groups. Advisory groups are best utilized for projects with numerous decisions needing public input or controversial projects.
Age Discrimination Act of 1975	A federal law that prohibits agencies that receive federal financial assistance for programs and activities from discriminating based on age.
Ambassadors	Individuals who are dedicated liaisons between communities and the project agency to assist in notifying, education, and involving residents in the public engagement process. As a best practice, ambassadors are typically compensated for their time and efforts through stipends and transportation fare.
Americans with Disabilities Act of 1990	Ensures the rights of disabled individuals to participate and benefit from the services, programs, or activities of any public entity regardless of funding sources.
Area studies	A type of planning project intended to develop a strategic plan to address the development, infrastructure, public services, transportation services, housing, amongst others, of a geographic location.
Awareness campaign	An engagement method used to bring the public's attention to a specific project or event through various communication modes.
Capital improvement projects	Projects intended to help maintain or improve a city asset
Card storming	A data collection method used in small groups to capture key ideas and issues and then organizing those ideas/issues into clusters.

Glossary of Terms	
Term	**Definition**
CEPD	Community Engagement Process Development. A City of Raleigh Planning Department project intended to improve the public participation processes used by the department for all long-range planning projects.
Community leader groups	Special interest groups that represent their communities and/or neighborhoods.
Community conversations	Impromptu conversations between project staff and community members that help to establish relationships and openness. Informal conversations can reveal unknown knowledge or opinions about the project and allows project staff to remain proactive in reducing conflict or tension.
Community leader	An individual who is deeply connected and trusted by other residents, business owners, religious leaders, community advocates and organizers to prioritize the wellbeing of their community. Community leaders are typically also long-term residents of their neighborhood community.
Corridor studies	A type of planning project that develops strategic policies to improve the function of a specific length of street infrastructure based on research, data, and community input.
Decision makers	Individuals in the project process who have the authority to make decisions related to budget, procurement, project direction, engagement methods and locations, etc.
Deliberative polling process	A structured process that allows participants to explore a specific issue or topic and then present their opinion after considering the pros and cons. A representative sample of the population fills out a questionnaire on their opinions on the issue, are provided with unbiased background material and information provided by subject matter experts and/or policy makers, and then asked to discuss the issues in small groups with trained facilitators. After this deliberation, participants fill out the original questionnaire again. The process is intended to last for a few days.

Glossary of Terms	
Term	**Definition**
Demographic profile	An informational overview of race, gender, income, education, language, poverty level, housing tenure, age, disability, and zero car household data of a community. The data is typically obtained through the U.S. Census Bureau American Community Survey.
Digital literacy	The proficiency of an individual to utilize digital tools and technology with ease.
Education program	An engagement method that is focused on relaying information to the public about project updates or new amenities, facilities, and services.
Executive Order 13166, Improving Access to Services for Persons with Limited English Proficiency	Requires agencies that receive federal financial assistance to take reasonable steps to ensure meaningful access to their programs and activities by Limited English Proficiency (LEP) persons.
IAP2	International Association for Public Participation, an international organization focused on the developing and implementing public participation processes to help inform better decisions that reflect the interests and concerns of potentially affected people and entities.
Interactive map	A spatial depiction of an area that allows individuals to select and engage with features in the map. Some interactive maps allow individuals to create and/or edit features.
Limited English Proficiency (LEP) individual	Any person who does not speak English as their primary language and who has limited ability to read, write, speak, or understand English. Limited English Proficient (LEP) individuals are entitled to fair treatment by agencies receiving federal funding for any program or activity through Title VI of the Civil Rights Act of 1964. Public engagement activities and events for federally funded projects where more than 50 LEP individuals are residents are required to have language assistance with translated written material and translation services.

Glossary of Terms	
Term	**Definition**
Meeting in a box	A conversation kit with discussion questions, worksheets, feedback questionnaires, and directions for recording and returning responses about projects or plans.
Meeting plan	An internal document that outlines how and what resources will be needed to conduct a meeting, including a meeting agenda and instructional guide for carrying out the meeting.
Mobile tours	Site visits to a community to get firsthand experience of community features, assets, and areas of concern.
Nominal group technique	Structured small-group discussion to develop a set of prioritized solutions or recommendations that represent the group's preferences.
Outreach area	A focused spatial area of residences, religious institutions, public institutions, businesses, and other community centers surrounding a project or study area who will be included in project mailing lists and geotargeted social media.
Outreach summary	A short, concise document that provides an overview of survey results, survey demographics, and meeting summaries.
Performance measure	Metric used to evaluate outreach methods and tools such as reach, social media impressions, etc.
Pop-up outreach	A method of outreach that involves attending community events with informational project materials and surveys
S-M-A-R-T	Specific, Measurable, Achievable, Relevant, Time sensitive. An acronym used to guide the creation and development of public engagement goals and objectives.
Stakeholders	Individuals, groups, or communities who may be impacted by the outcome of a project or decision.

Glossary of Terms	
Term	**Definition**
Study circles	A small group process where a diversity of participants from a particular geographic location meet as separate groups several times to discuss critical issues using a structured process where each session builds on the one before it.
Title VI of the Civil Rights Act of 1964	Prohibits agencies that receive federal financial assistance from discriminating based on race, color, or national origin, including matters related to language access for limited English proficient (LEP) persons.
Virtual public meetings	A digital mode of public meetings hosted as an alternative to in-person sessions. They take place over the internet allowing participants to view project information and/ or updates on their own schedule.

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