

March 2019, Town of Erie

ENGAGEMENT STRATEGY

EXECUTIVE SUMMARY

Who

This strategy is a guide for staff, partners and stakeholders for Engagement in the Town of Erie.

What

This document:

- Describes core values, strategies, and best practices to engage in the community in a meaningful way.
- Presents menus with options of specific implementation recommendations and toolkits, so teams can customize plans for any given project.

The SIX KEY STRATEGIES are:

Know the community

Set expectations with the project team

Cultivate local advisors and champions

Engage at all levels, matching outreach to impact

Establish enduring relationships

Elevate success

And the FOUR KEY VALUES are:

Meet people where they are

Be inclusive and accommodating

Target communications, but also use multiple channels

Be transparent and responsive about the process and what was heard

When

In a word: always. Each project has its own timeline, but engagement will be a consistent element through the lifecycle of projects.

Where

Meet people where they are – this will be project dependent. “Go to the people!

Traditional techniques like public meetings don’t work like they used to – they’re often

inconvenient and can disempower people” – Communications and Marketing Manager, Town of Erie.

Why

We want to be transparent and develop enthusiastically satisfied residents and visitors alike. We will not succeed with this bold vision without the involvement of the community. Although staff has significant expertise, the product we deliver (a best place to live) is improved by a deeper understanding of residents of, business leaders in and visitors to the Town of Erie).

Successful community engagement leads to increased backing for plans and projects, pride and ownership, trust in local government, cost-savings by getting it right, and simply put, better projects.

This Engagement Strategy means that there is a standard of excellence, with multiple paths to achieve it. Nobody is starting from scratch or repeating mistakes, and everyone knows what to expect.

How

Expectations, roles and responsibilities will be set up with each project team, according to the specific needs and resources available on a given project.

INTRODUCTION – Section 1

Welcome Letter

Welcome to the Engagement Strategy for the Town of Erie! This document is a guide for staff, partners, and stakeholders in the Town of Erie. This is helpful for the collaborative teams who are implementing the community’s vision in two main ways:

- It describes core values, implementation strategies, and best practices to engage the community in a meaningful way on projects.
- It provides menus of options of specific communication, consultation, and participation tools, so teams can customize plans for any given project.

Our efforts are driven by the promise to the people of the Town to enhance people’s quality of life and strengthen the social, economic, and environmental well-being of our Town. We are constantly pursuing projects for the people and with the people of the Town of Erie in the form of a Work Plan. Therefore, comprehensive, ongoing, and genuine community engagement is one of the core values of our organization.

Community engagement can take many forms. In our work, it is a process by which our organization, our partner organizations, and residents of the Town of Erie build ongoing relationships to achieve a shared vision for building, promoting and sustaining our projects.

This engagement strategy borrows the best from our experiences, reflects lessons learned from previous missed opportunities, includes feedback and advice from other agencies, organizations and experts, inserts best practices from communities elsewhere, and serves as a resource for others.

What is the Work Plan?

The Work Plan is an approach through which the Erie Board of Trustees sets the priorities Town staff and the Board will work on each year. The Work Plan is composed of numerous issues and projects. For each issue or project, the Board indicates the level of desired community engagement and the expected outcomes. You can view the current Work Plan at [this link](#).

Background

How We Work

The Town of Erie is a collaborator in the community, and our region’s vibrancy is strengthened through this collaboration. We believe many hands make light work, and partnerships increase impact. Residents of the region benefit when we work together. We succeed not by doing “for” but by doing “with” community members committed to proudly building, promoting and sustaining the project for years to come. This collaboration is the foundation of our engagement strategy.

Engagement matters throughout the lifecycle of a project. From brainstorming concepts, to master planning, to ongoing operations and maintenance, engagement matters. This strategy is for all of our projects and on an ongoing basis.

Why Community Engagement Matters for Town of Erie

Our task is to maintain those things about Erie that people already love, and to build on that foundation to achieve enthusiastically satisfied residents and visitors alike. We strive to realize the community's vision of being a Best Place that the community uses, benefits from, enjoys, feels proud of, volunteers to take care of, donates toward, and votes for. We cannot and will not succeed with that bold vision without the involvement of the community. Our staff and partners have significant expertise, but the more any organization understands its customers, the better service and products they can deliver. That means we must proactively engage people across the entire Town of Erie. We need their input to know what they need, what works for them and what doesn't. We need their help to understand their challenges and opportunities. We welcome their collaboration in generating interest in and support for the Town.

Overall Strategy Benefits All

Every project is different. Community engagement should never take a one-size-fits-all approach. However, strategy and standards still have value. Accordingly, for any project:

- There is a standard of excellence, with multiple paths to get there. This strategy isn't prescriptive of each task, but it sets up our values and expectations, with ways to achieve the outcomes we seek.
- Nobody is starting from scratch or repeating mistakes. We offer helpful resources so teams can form a plan easily by leveraging past successes, learning from missed opportunities in the past, and feeling confident in the tactics they choose.
- Everyone knows what to expect. From the partners to the community members, having a plan helps everyone to understand their roles and responsibilities to set each other and the project itself up for success.

How Will this Work

Just like with the other elements of the plan, the expectations, roles, and responsibilities will be set according to the specific needs and resources available. We (Town of Erie) will ensure that this document and strategy guide the whole team (staff and partners) to make a plan that fits the project. Depending on the needs and resources of that project, the team can determine who plays what roles. Sometimes, a community partner may lead much of the engagement because they are already a trusted voice in the community. Other times, engagement may be managed between Town of Erie staff and partner staff resources. Some projects may

incorporate engagement into the contract of a team of vendors to execute during their phase of projects.

GETTING STARTED – Section 2

Project Profile

The first step is to identify the basics of the project at hand. When a team is conceptualizing or kicking off a project, they will consider these criteria, along with many others. From a community engagement perspective, we recommend the following discussion be explored to establish the level of and approach to engagement.

A Strategic Framework for Public Engagement

Six considerations for sponsoring your next public engagement initiative

- #1 What is the topic of engagement?**
 - Why do we need to engage?
 - What questions does the public want to address?
 - What is on or off the table?
 - What are the risks of not engaging?
 - What criteria will we use to make a decision?
- #2 What are we trying to achieve?**
 - Raising awareness and education
 - Transforming conflicts
 - Exploring ideas and information
 - Contributing to decision-making
 - Mobilizing collective action

Adapted from: NECD Resource of Engagement, necd.org
- #3 How will our decisions affect communities?**
 - Who is affected?
 - What is the degree of impact for each group?

Adapted from: SPARC BC Community Engagement Toolkit, sparc.bc.ca
- #4 What level of engagement are we promising the public? (IAP2)**

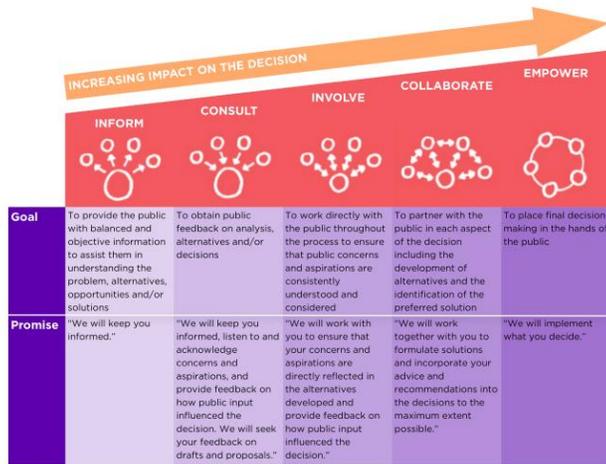
INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
<p>"We will keep you informed."</p>	<p>"We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision. We will seek your feedback on drafts and proposals."</p>	<p>"We will work with you to ensure that your concerns and suggestions are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision."</p>	<p>"We will work together with you to formulate solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible."</p>	<p>"We will implement what you decide."</p>

International Association for Public Participation, iap2inc.ca
- #5 What is the reach of this engagement initiative?**
 - How far and wide should the reach of engagement be?
 - What are the budget and timeline for engagement?
- #6 How will we follow through?**
 - How will we report back on what we heard and how the public's input was used in making a decision?
 - How will we evaluate the engagement and report on the results of the evaluation?

Collaborating with Community

There are lots of ways to invite the community into the process of bringing a project to life. Below is the International Association of Public Participation (IAP2) Spectrum of Public Participation. It shows the many different ways to interact with community members, ranging from informing to truly empowering them to make decisions. The most successful community engagement takes place further along the spectrum. While it's not always feasible for every single aspect of a project, the spectrum is useful to plan that out. The first step in getting started (but this task will continue throughout the project) is to match the elements listed previously with their proper place on this spectrum. Remember that in order to succeed on the right side of the spectrum, it may

take some education for community members, partners and even vendors to understand the realities of the way the project works. This education is an opportunity itself—embrace it! As noted previously, even the community engagement itself can be determined with input from the community. This may look like a Community Advisory Committee choosing the frequency of public meetings or types of communication to include. One size does not fit all—customize for each project! The next few sections will walk through how to do so.



International Association for Public Participation (IAP2) Spectrum of Public Participation

Successful Community Engagement Leads to:

Increased backing for plans and projects. Generating local support and personal involvement leads to better planning, enthusiasm, and use by community members.

Pride of Ownership.

The more the community feels respected and heard, the more they will feel satisfaction in their community and government.

Trust Formation.

Operating from a position of transparency, inclusivity, and honesty builds legitimacy. This is particularly important with communities that have been ignored or victimized by past planning processes.

Better Projects.

Planners cannot know neighborhood intricacies. Welcoming the context of past similar experiences, concerns, and ideas leads to more viable planning. Creating new resources that the community will use results in a more vibrant environment.

Long Term Cost Savings. Getting it right the first time helps avert future disputes and project fixes.

KEY PRACTICES AND GUIDING VALUES – Section 3

Guiding Values

Meet People Where they are

Of the community members we want or need to engage, people have varying levels of knowledge, trust, vocabulary and context. Any engagement plan must meet people where they are:

- Physically–Figure out where people already gather or what community events can be tie-ins.
- Mentally and emotionally–Find out about past experiences and knowledge as a helpful context to know how to present this project. Listen to language to understand whether people share facts, feelings or value and respond accordingly.
- Culturally–Does this community like to discuss issues over food? Are most people working at times that makes them unavailable at traditional times? Do people read their neighborhood newsletter? Are there effective hosts or speakers who are trusted?

Be Inclusive and Accommodating

Being inclusive means we reach out to all who may be interested in or affected by the issue or project we are working on.

- Consider: organizations serving those with disabilities, local employers and employees, local schools and children’s centers, colleges, universities, job training centers, faith groups and leaders, and local groups with a specific racial or ethnic focus. Being accommodating means we serve the needs and norms of all community members.
- Host events in the community where invitees are located and near public transportation. If transportation is a barrier, Champions could help provide rides for elderly, youth, low-income households or anyone who may need it.
- Time meetings for the convenience of participants. • Make every effort to be accessible and child-friendly. Ensure that facilities and programs are accessible to those benefitting from physical, visual, hearing, and language accommodations. Provide child-friendly activities or child care.
- Note accommodations (or barriers) on invitation.

Target Communications, but also use multiple methods

Gone are the days when news and information could be effectively dispensed from a single credible source. We now must use multiple, overlapping communication methods to be heard. By using a variety of channels based on audience, each group has access to the information most relevant to them. Those who are directly impacted will have maximum exposure to the information they need.

Be Transparent and Responsive about your process and what you heard

Let community members know up front when and how we will use their comments and suggestions and respond to concerns they may raise. Be clear about why we want their comments and what kind of impact it will have. Communicate throughout the project what you're hearing, whether and how it impacted the project and, if not, why not.

Key Practices to Implement Town-Wide

Coordinate and Engage with other Partners and Projects

In order to be a good steward of the taxpayers' investment, it's important to consistently communicate and coordinate with others doing projects in the region. Whether it's another government entity, a local developer or a nonprofit effort, it is vital to know what else may impact plans, projects or communities. Not every project calls for a partnership or collaboration, but consistently checking in with others:

- helps you get to know the community
- helps to identify opportunities for collaboration
- helps avoid conflicts of timing or geography
- helps avoid duplication of efforts
- provides opportunities for learning, synergy

For the Town of Erie, this means holding ongoing meetings and outreach to other entities to catch up on past, current and future plans.

Check with Experts

Investigate regional assets that might be used by anyone from any part of our region for a wide variety of purposes.

Key Practices to Implement on Projects

Know the Community. The vital first step in any community work is to get to know their inner workings and what to expect. For the Town of Erie, this means creating a Community Profile to get to know everything, from broad influences to specific details that impact the community.

Set Expectations

Beyond setting up the plan for engagement, set up the project team's expectations for success, communication methods, roles and responsibilities, and overall project goals. Schedule check-ins and milestones, including meetings before and after engagements with the community to prepare for the events and then absorb what you heard and make changes. Talk about when and how quickly responses or changes can happen, so you can communicate those expectations to the community throughout the process. Think outside of the usual suspects when it comes to forming your project team. The individuals who form the project team can provide a wide range of expertise and can be an opportunity for engagement itself. If a project is particularly complex, setting up a Technical Advisory Group can be an important way to get ownership over specifics.

Cultivate Local Advisors and Champions

Community leaders and influencers identified in the earlier steps can become deeply involved, providing invaluable insight, ideas, and cautions. They can pressure-test ideas in the community and invite others to join in. Quality involvement is more important than the number of people in this group. Invite local stakeholders to engage as a Community Advisory Committee (CAC) member or serve as a Champion for a project. A Champion is a member of a specific community (which might be a neighborhood, a church or another entity) that can serve as a liaison to give updates to and gather feedback from that community, serving as an extension of the project team with a trusted, authentic voice.

Engage At All Levels Matching Outreach to Impact

Levels of impact are divided into three tiers:

REGIONAL—surrounding stakeholders impacted.

- Provide general updates and broad awareness of the project, including announcing events and milestones so people can follow along and, when appropriate, give feedback.
- Use channels like earned media, paid advertising, website updates, and community and partner group newsletters to inform the region at large.

NEIGHBORHOOD—Genuine engagement is especially important for the people who live in the town or neighborhood where the project is located, throughout planning, design, construction and ongoing programming and maintenance.

- Engagement should include consultations and participatory events, reporting back from those meetings, and sharing news consistently. Identify liaisons and Champions to assist in engaging their neighbors.
- Use channels like posting fliers in public buildings and businesses, providing street-level signage, utilize online engagement software, sending emails from elected officials, and reaching out to neighborhood-specific social media groups such as Nextdoor, Facebook and Google Groups.

DIRECT–Detailed communication is crucial with those who are directly impacted by construction and/or the project, e.g., someone whose property, transportation or other daily habits will be altered.

- Engagement should be on a personal level, ensuring receipt and understanding of information. Project updates and timelines, including urgent updates, should have established methods of communication.
- Use more targeted channels like door hangers, direct mail, electronic street signs, and neighborhood-specific social media groups.

Establish Enduring Relationships

While projects have end dates, they become a permanent part of the community. Good engagement cultivates lasting relationships to ensure ongoing dialogue throughout the lifecycle of a project. The conversations can ebb and flow through conceptual planning, design, construction and into daily use and upkeep, but should never shut off completely.

EVALUATE SUCCESS- Success should be evaluated with all parties throughout the development of the project, not just at the end. Check in with partners, residents, vendors, and other team members to ensure the project and process are on the right track. Setting reminders to do this at regular intervals, as part of a team meeting, may be helpful. Evaluate success through the parameters set by the team during the initial planning. If helpful, have a meeting hosted by a third party source for honest feedback. Remember to tell community members how the feedback they gave was heard and incorporated throughout the process. Repeating back what you heard and explaining how the project changed (and/or didn't change) because of engagement is crucial.

IMPLEMENTATION – SECTION 4

COMMUNITY ADVISORY COMMITTEE

OVERVIEW

Community Advisory Committees (CAC) are an integral part of planning and designing projects. Their primary purpose is to provide advice related to a specific project from the perspective of a person who lives, works, studies, worships, or recreates in the project area. CACs discuss, analyze, and provide thoughtful recommendations on plans and/or design.

BENEFITS

CACs should be made up of people with a wide range of interests and personal experiences who wish to contribute their knowledge and perspective to planning and designing a solution that best reflects desired community experiences. Ideally, a CAC amplifies voices of community members that may be otherwise unheard in the process. Participation on a CAC provides leadership opportunities to community members who are interested in participating in public processes. Involving a CAC in the process accomplishes the following beneficial tasks:

- Create a forum for discussing issues in greater depth
- Thoroughly review complex matters
- Provide expertise that only people with intimate knowledge of the project area can provide
- Address potential points of conflict or concerns and create solutions to these issues
- Share project information

TECHNICAL ADVISORY GROUP

OVERVIEW

Technical Advisory Groups (TAG) guide the planning, design, engineering, and construction of a project. TAG Members are stakeholders who advise on the technical aspects through a lens specific to their area(s) of expertise. TAG Members may represent state agencies, municipal departments, utility companies, local developers, service providers, institutions, or individuals who are able to provide technical advice and recommendations related to the project.

CREATING A TAG

A TAG is created when a specific project is entering the planning or early design phase. Staff and the project team meet to identify the entities or individuals who may be able to provide technical advice related to the project and invite them to send a representative to the TAG meetings.

TAG MEETINGS

The TAG meets on an ongoing basis through the project duration. Meeting frequency may vary depending on the particular phase. TAG meetings are typically held during the workday because involvement on the TAG is work-related for most Members. Once the project is completed, the TAG is dissolved.

LEVELS OF ENGAGEMENT

Here's a guide for the extent to which each group should be engaged throughout the various phases of a project. Of course, projects may vary, but this can help estimate the level of effort and depth of engagement.

COMMUNITY ENGAGEMENT MATRIX

There are many levels of engagement. These levels can be better understood as we create our plan based on the engagement matrix. The matrix consolidates these many levels into two:

- **COMMUNICATION**–Sharing of information and building understanding about projects and issues, including personal impacts and those on the wider community.
- **COLLABORATION**–Inviting peoples' opinions, criticisms, and suggestions can test assumptions, welcome new ideas, and create a broader view. Consulting improves accountability of leaders and community ownership. Deeper participation includes involving members of the public in leadership activities and decision making.

Participating improves public confidence and support, leads to mutual accountability, and builds awareness and understanding. The matrix is broken down into the various phases in the development -master planning, design, construction, then maintenance and programming.

Next, the matrix is divided into columns by the level of engagement–communicating (single and/or detailed messages) and collaborating. Finally, the matrix is divided by the four different audiences, all of which have been described in the preceding pages.

For the sake of this chart, the “Advisors & Champions” audience combines Technical Advisory Groups, Community Advisory Committees, Advisors, Champions and other stakeholders. A description of each engagement tool follows the matrix and includes information about the potential cost of various tactics.

This matrix allows each project team to consider all the goals, risks, and opportunities of the project and tailor the given recommendations to the project at hand. This is just a starting point! When you choose a tactic, remember to plot out how long it will take to execute. Consider the timing of partner coordination and schedule enough time to complete the prepping of materials, testing on a small group of people if at all possible to ensure successful approach and getting any

necessary approvals (including partners), so that everything can be completed at least one month before an engagement. One month of "promotable time", meaning time to advertise a meeting or survey or opportunity, is the minimum recommended to get a good response. With any given tactic, schedule time to make the plan, promote the opportunity, prepare the specifics, execute the engagement(s), recap the results, incorporate them into the project or make any key decisions and report back to the community what you heard, how it was used and what the next steps entail. If any outside resources are necessary, such as a consultant or service, allow extra time to procure and onboard those resources.

MASTER PLANNING

	COMMUNICATION		COLLABORATION
	Single Message <i>(such as a public meeting announcement or project timeline)</i>	Detailed Message <i>(such as specifics of a project)</i>	
Advisors & Champions	emails, letters, phone calls	emails, letters, phone calls	charettes, meetings , online feedback tool, site tours
Regional Impact	media releases , newsletter, print publication advertisements, social networks, website posts	commentary, media releases , newsletter, social networks , street teams, tabling, website posts	participatory art, real-time audience response systems, community mapping, focus groups, online feedback tool, public exhibits with feedback boxes, public meetings, surveys
Neighborhood Impact	electronic message boards, emails, media releases , newsletter, postcards/doorhangers , posters/fliers, print publication advertisements, social networks, website posts , yard signs	emails, letters, media releases , newsletter, social networks , street teams, tabling, website posts	participatory art, community mapping, focus groups, online feedback tool, public exhibits with feedback boxes, public meetings , real-time audience response systems, surveys, workshops
Direct Impact	electronic message boards, postcards/doorhangers , yard signs	letters , postcards/doorhangers	focus groups, online feedback tool, site tours, surveys, workshops

MAINTENANCE AND PROGRAMMING

	COMMUNICATION		COLLABORATION
	Single Message <i>(such as a public meeting announcement or project timeline)</i>	Detailed Message <i>(such as specifics of a project)</i>	
Advisors & Champions	emails, letters, phone calls	emails, letters, phone calls	issue-based roundtable/forum, meetings , participatory budgeting, photovoice, site tours , walk/bike/wheel audit
Regional Impact	media releases , newsletter, social networks, website posts	media releases, newsletter, social networks , street teams, tabling, website posts	focus groups, online feedback tool, photovoice, public exhibits with feedback boxes, public meetings, surveys
Neighborhood Impact	electronic message boards, emails , media releases, newsletter, postcards/doorhangers , posters/fliers, print publication advertisements, social networks, website posts , yard signs	emails, letters, media releases , newsletter, social networks , tabling, website posts	focus groups, issue-based roundtable/forum, online feedback tool, photovoice, public exhibits with feedback boxes, public meetings, surveys , walk/bike/wheel audit, workshops
Direct Impact	electronic message boards, postcards/doorhangers , yard signs	letters , postcards/doorhangers	focus groups, issue-based roundtable/forum, online feedback tool, photovoice, surveys , walk/bike/wheel audit, workshops

TOOLS AND DESCRIPTIONS

Charrettes–Intensive, multidisciplinary developmental process facilitated by experts that is designed to support an open discussion between project stakeholders with feedback incorporated into the final plan; Costs may include meeting room rental, food and \$80-\$200 per hour for facilitation services (this is a type of workshop)

Commentary–Subject matter experts may give commentary in a testimony, newsletter column, or news interview; Costs incurred may be included in a commissioned research contract

Community Mapping–Allows residents to map community assets when and connections; Accessible and graphic way to learn about people’s perceptions of a place that can be useful in the visioning process; Costs may include room rental, food, and printed maps

Electronic Message Boards–Portable roadside sign that can be programmed with a single message; Municipal/transportation agency project partners may donate use of sign or typical rental cost is \$1,000 per week

Emails–Email lists may be developed from contact information provided through previous project engagement efforts or by elected officials, municipalities or other partner organizations; No outside costs

Focus Groups–Structured interview with 6-8 individuals representing the wider target group to elicit feedback on ideas, concepts, methods, and plans; Feedback is recorded for use in project design and communication; Typical cost for a focus group session run by a third party is \$4,000-\$6,000

Letters–Direct mailings to residents, business owners and property owners; Typical printing/ folding/envelope stuffing cost for 500 is \$50, postage cost for 500 is \$235. Return rates (and cost) increase with self-mailing return envelopes.

Media Releases–Notices and announcements shared with multiple media outlets; Sharing is encouraged via multiple outlets including television, radio, print, and social media; Costs incurred may be included in a public relations consultant contract

Meetings–Ongoing in-person meetings with specific individuals such as project stakeholders, Champions, and Community Advisory Committee members; Costs may include room rental and food

Newsletter–Written content for digital newsletter; Sharing in partner digital and/or print newsletters is encouraged; No outside costs

Online Design Tool–May include features such as mapping, envisioning alternatives and understanding potential impacts, sharing information on the project and its goals, ranking priorities, rating strategies and scenarios, crowdsourcing ideas, collecting feedback on ideas, discussion forums, selecting project features, and standard

surveying/polling; Examples include SpeakUp, EngagementHQ, CrowdGauge.com, Loomio.org, Metroquest.com, MindMixer.com, Placeways.com, PollEverywhere.com, and Stickyworld.com; Costs vary by account type

Online Feedback Tool–May include features such as reporting issues using geospatial feedback and images and discussion forums to develop ideas and build consensus; Examples include Sli.do, CommunityRemarks.com, LocalData.com, SeeClickFix.com, and Tellus-Toolkit.com; Costs vary by account type

Online Planning Tool–May include features such as mapping, envisioning alternatives and understanding potential impacts, sharing information on the project and its goals, ranking priorities, rating strategies and scenarios, crowdsourcing ideas, collecting feedback on ideas, discussion forums, selecting project features, and standard surveying/polling; Examples include EngagementHQ, Codigital.com, CommunityRemarks.com, Crowdbrite.com, CrowdGauge.com, Loomio.org, Metroquest.com, MindMixer.com, Neighborland.com, Placeways.com, PollEverywhere.com, and Stickyworld.com; Costs vary by account type

Participatory Art–Artistic tools for engagement may be visual such as drawing or painting a plan or design for a location or verbal such as writing poetry or storytelling to guide the plans, designs, or maintenance of a location; Costs for artist facilitation are approximately \$250-\$500 per hour

Participatory Budgeting–Stakeholders and residents are able to directly decide how to spend part of a public budget (i.e. programming budget); Participatory budgeting processes may include community brainstorms, delegate committees turning ideas into proposals, and resident voting; Costs include staff time

Photovoice–Participants are asked to document and reflect on a particular issue in their community by photographing scenes that highlight that issue and then collaboratively interpreting the photographs through group discussion and written narratives; Photos and narratives are used to promote dialogue with policymakers to better understand and act on these community issues; Costs include photo printing and display and staff time for facilitating discussion and communicating with policymakers

Postcards/Doorhangers–Print notice of a single message such as meeting notice or pending construction timeline; Typical printing cost for 500 postcards is \$300, postage cost for 500 is \$200, typical distribution cost for 500 doorhangers is \$300

Posters/Fliers–Posted in public gathering spaces such as recreation centers and coffee shops; Typical printing cost for 500 fliers is \$140, additional labor costs for hanging posters/fliers
Print Publication Advertisements–Paid advertisement in a print publication such as a community paper delivered free and available publicly; Typical cost is \$200-\$500 for 1/8 page

Public Exhibits with Feedback Boxes–An exhibit of plan concepts displayed over a period of time allows for informal review and feedback; Ideal locations include city halls, recreation centers, public libraries, visitor centers, and parks; Costs include

display materials (poster boards, comment box, etc.) and staff time for fabrication and installation

Public Meetings–Open gathering with designated speakers and time for answering questions; Costs may include room rental, food and printing display boards (\$25 per 2' x 3' board)

Real Time Audience Response Systems–Tools such as keypad polling and text message communication/ analysis can be used to collect and visually display audience responses in real time; Keypad polling systems may be rented for approximately \$4 each per meeting; Costs for texting tools such as textizen.com depend on volume and are approximately 50 cents per response

Site Tours–Provide an opportunity for impacted individuals to visit the site to envision the project and amenities and visualize the before and after; Provide opportunities for discussion, Q&A, and feedback; Typical cost is \$1,000 per day for charter bus rental

Social Networks–For reaching general and targeted audiences Google Groups, Nextdoor, and Facebook can be used; Twitter can be used to provide news and timely updates; Waze can be used for real-time crowdsourcing; Advertisements can be purchased through Facebook and Twitter and range from a few dollars to thousands of dollars depending on size of targeted audience Street Teams–Paid staff and/or volunteers assemble in public gathering spaces to conduct quick surveys and hand out branded gifts; Staff time costs

Survey–Structured comment form or questionnaire distributed online, by phone, by mail, in person, or written at an event; Annual online survey service fee is \$200; Typical cost for a third party phone survey is \$5,000-\$15,000; typical cost for 200 snail mail survey responses is \$5,000-\$7,000. Costs can include developing, marketing and analysis/ formatting of results.

Tabling–Information booth at community festivals and events hosted by staff and/or volunteers; Staff time costs Walk/Bike/Wheel Audit–Audits of an environment are performed on foot, on bicycle, and by wheelchair to provide an unbiased evaluation of the walking, biking, and wheeling environment and to identify concerns for people walking, biking, and wheeling related to the safety, access, comfort, and convenience of the environment; Audits are often performed by organizational staff with volunteers; Audit toolkits are available from organizations such as AARP and the CDC; Costs include staff time

Website Posts–Posts can be made in website news articles and/or website event calendars; Sharing with partners is encouraged; No outside costs

Workshop–Workshops can be held with large or small groups of people to work through an issue and/or develop solutions; Possible costs include meeting room rental and food

Yard Signs–Corrugated plastic yard signs on metal “H” frames placed in public spaces and parks provide information to passersby; Typical cost for ten 18” x 24” with frames is \$100 and additional cost for staff or street team time to install and remove

HOW TO DO IT

CREATING A CAC

Staff creates a CAC when a specific project enters the planning or early design phase. A CAC should include Members who live, work, study, worship, and/or recreate in the project area. CAC size is related to project size and typically includes in 10-50 Members.

In addition to identifying potential CAC members, the project team may identify community institutions such as schools, houses of worship, residential complexes, or neighborhood organizations that should be represented on the CAC. A member of the project team then reaches out to each of the institutions to request a CAC member nomination. Participation on a CAC provides an opportunity for community members who are not already in positions of power or actively involved in a local institution to step into a leadership role.

Staff recruits CAC members through an application process. The application should be made available both digitally and in paper form and disseminated through community institutions, at community events, and through local communications channels identified in the Community Profile. In order to create a CAC that represents the diverse perspectives and demographics of the community, the application form should request information related to location of residence, interest in the project and serving on the CAC, community involvement, area(s) of interest, age, gender, income level, and race/ethnicity. Contact info and preferred method of contact such as call, text, email, or mail should also be collected from applicants.

Potential applicants should be informed of the expected duration and frequency of the CAC meetings. Applications are reviewed by the project team, and CAC Members are selected based on their ability to represent the diverse perspectives and demographics in the identified geography. Staff will notify all applicants of their selection status. Staff will provide applicants who are not selected for the CAC with other opportunities to provide input and feedback on the proposed project through collaboration tools such as open houses, surveys, and other tools identified in the matrix.

Staff will poll selected CAC members to identify preferred meeting dates, times, and locations. If CAC members are not available to meet in person, staff will make accommodations when possible for CAC members to participate remotely via video chat, recording presentations, surveying on topic(s) covered in CAC meetings, and/or makeup meetings. Participation on a CAC is voluntary, and members are not financially compensated for their service. CAC Members **should be provided** with food and

beverage at meetings during meal times, childcare during meetings when possible, and transportation arrangements to and from meetings when possible.

IMPLEMENTATION

During the first meeting, key topics to cover are introduction of CAC Members and the project team, project overview, and CAC roles and responsibilities. During CAC meetings, time should be set aside for CAC members to socialize and network with one another and the project team. CACs may meet monthly or more or less often depending on the project needs through the duration of the project. Once the project is completed, the CAC should be dissolved. If a CAC Member would like to continue to provide feedback and advice after, the former CAC Member may wish to transition into a Champion or Advisor role.

Some CAC Members may be inclined to speak more often than others during CAC meetings. Meeting facilitators should use methods such as keypad polling, round robin answering, self-writing responses, and dot voting to ensure that all voices are heard during CAC meetings. Following each CAC meeting, a summary of the meeting including input and feedback gathered from CAC Members should be shared with all CAC Members.

CREATE THE COMMUNITY PROFILE

The Community Profile is developed through a series of interviews and is used to guide engagement. From the Profile, we understand community history and learn how decisions are made. We gather good ideas and understand possible resistance. We get a sense of community leadership and relationships among people, groups, and neighbors. We use it to start listing possible Champions and concerns to help guide community meetings and responses, and we better understand where to hold meetings and how to reach people. Interview the Mayor or Town staff, impacted elected officials, and local influencers:

- What does success look like?
 - What concerns do you have?
 - What role would you like to play?
 - Describe your constituents and neighborhoods. What have they experienced? How might they react?
 - What will excite and concern people the most about the project?
 - Who are influential individuals or organizations?
 - Who are likely allies and likely detractors?
 - Who are predictable participants and who has been left out?
 - Describe successful and unsuccessful local engagement efforts.
 - Where do people gather? What local events should we attend?
 - What are your current functional communication methods, community calendars, etc?
 - What else is happening in your community during this project timeframe?
- What issues do we need to be aware of, such as elections, developments, etc?

- What are your community's priorities? (i.e. safety, health, economic development, etc)

Interviewing stakeholders to create the Community Profile is the first step. Especially if they do not offer data-driven background, context or reports, it's helpful to do independent research to determine demographics and history. It is also valuable to do a mapping analysis of nearby assets, destinations, venues, possible partners, and to get a feel for the type of neighborhood or town.

SET EXPECTATIONS with Project Team

With the project team, answer the following questions:

- What does success look like? How will we know if we have been successful?
- Who from each partner organization is involved in community engagement for the project? • What are the best and worst ways to communicate with each other?
- Who is doing what, and when are we working independently or collaboratively?
- Do we need to set up a review process?
- What can we schedule now?
- What are the timing considerations from all parties involved? What elections, board review processes, habitats and other items may factor into our decision making throughout this process?
- When we set up an engagement event, how close to that event should we meet to prepare and then to debrief?
- What time frame can we agree upon as reasonable responsiveness, to each other and the community?
- How will we incorporate the feedback received into the project?
- What other resources are needed?

RECRUIT CHAMPIONS

Recruit Champions from local elected, municipal, nonprofit, business and religious leaders, school officials, community volunteers and neighbors. Ask for names of possible Champions during interviews when building the Community Profile. Make roles meaningful and lasting

- Work with group to develop a mission statement and list of goals.
- Invite their input and ideas for outreach and inclusion.
- Hear their concerns and discuss anticipated concerns of the community.
- Find out what roles they would like to play.
- Ask them to share what they are hearing with others and invite them to future meetings. Meet at agreed upon intervals
- Ask if a member can host, perhaps rotate meeting locations. • Invite them to bring friends, expand the circle.

- Use an agenda that includes the following:
 - Project updates – Feedback from the group – Issues in the community
 - Ways to get involved – Regional plan updates – Reflection on meeting and issues raised

One of the greatest benefits of an engaged group of Champions is their ability to reach their neighbors directly to capture and, hopefully, soften concerns and promote the project. They will hear the most honest feedback and be best able to gauge if a community member has a new great idea or if problems are arising. Use Champions to convey messages before attempting to approach directly. Communication from neighbors to neighbors and elected officials is more effective than from outside institutions. Champions can also diffuse issues that are unrelated to the project.

ENGAGE THE COMMUNITY

Whether you are holding a community meeting, sending a mailing or speaking with a small group, remember to use clear, accurate and transparent communications:

- Use plain language and nontechnical maps and images.
- Define your objectives, be clear about what you intend to do and why.
- Think back to the last time the community had an update—what has changed since then and what questions might they still have? Remember that they have not been working on this every day since the last engagement. Recaps can be very helpful!
- Be sincere in your questions and answers and remember that good ideas can come from anywhere—resist the urge to have all the answers.
- Listen actively, reflect what you have heard, repeat and respond to concerns.
- Remember to answer people's questions the way they asked them - are they focused on facts, feelings or values? Respond accordingly!
- Welcome input through multiple forms.
- Keep and share records of meetings so everyone has access to relevant information and/or can see themselves represented. For meetings or events, remember these best practices:
 - Promote meeting information using direct and indirect means.
 - Target a broad range of participants, not just “usual suspects.” – Reach out personally to those directly affected. – Include outreach to neighboring residents and businesses as well as anticipated project users.
 - Convene more than one meeting on any important topic.
 - Offer different locations and times, if possible, to provide greater opportunity for participation.
 - Choose locations that are accessible to public transportation and to people with mobility, communication, and language challenges. If special

accommodations for people with disabilities are provided, list them in the invitation (i.e. sign language interpreter).

- Consider an activity for children to draw in families and build civic awareness for even the youngest community members.
- Consider offering a streaming option or filming and sharing presentations to give access to those who cannot attend.
- Utilize Champions or other known people as hosts and speakers.
- Focus groups should include no more than six to eight people, in guided conversation about the project with a moderator.
- Always encourage everyone to sign in and provide contact information, clarifying that they will only be contacted about this project, unless they opt in to an overall newsletter.
- Include contact information on survey or comment forms, and be sure to compile and cross-reference both possible contact points for accuracy.
- Always include a source to reference and a number to call for more information.
- Reach out to attendees afterward: – Thank them for their attendance. – Include specific input you received and respond to it. – Include community update with renderings, maps, timeline, and ways to stay informed and get involved. – Invite them to connect via social media. – Request that they share information via their networks.
- Share future updates and invitations that include specific project information and system-wide information if appropriate. – Frequency depends on project phase, level of activity, and opportunities for engagement. – Include subscribe and unsubscribe options.
- Let the community connect with the goal of ensuring that community engagement events and processes reflect the diverse interests, needs, and perspectives of the community, it can be helpful to ask the following questions into the beginning of meetings (either at the entry and sign-in stage or as part of the introductory portion of the meeting agenda): – Who is in the room? Specifically, ask participants to use the colored dot on the chart method or through other means identify themselves demographically:
 - racial/ethnic identity
 - gender identity
 - age range
 - household income (ranges)
 - geography (however is needed)
 - type of stakeholder
 - tenure in that stakeholder role

Then, when participants have a chance to see the overview of who is in the room, ask participants if that reflects who will be impacted by the project. Based on answers, ask participants to identify who is missing from the room – and who should be there to genuinely reflect the community’s interests. For surveys or feedback forms, whether formal or informal, follow this format:

- INTRODUCTION:

Paragraph explaining who is conducting the survey and why. If on paper, allow them to remain anonymous or share contact information. Estimate the time that it will take to complete. Thank participants for their input.

- BODY:

Start with general questions, then move to more specific. Keep questions simple (one topic per question) and unbiased. If you are seeking specific information, ranking possible amenities for example, list them. Otherwise, ask open ended questions to find out what is on their minds.

- DEMOGRAPHIC QUESTIONS:

For the purposes of the project, it may be helpful to know such things as a respondent’s role or status. For example, create a list and ask them to check all that apply: I am a homeowner adjacent to project, I live in the neighborhood, I operate a business in the neighborhood, I operate a business along the route, I am an enthusiastic cyclist or walker.

- CONCLUSION:

Thank them again for participating. Share your contact information inviting follow-up thoughts or questions. Informal paper surveys should be available at all open houses and community meetings. These are not intended to be scientific, but rather to inform progress and make sure that opportunities and concerns are being raised. Web based surveys (i.e. Survey Monkey) can be conducted among those who have shared personal contact information or if an elected official or a partner organization distributes the survey directly to their email list with a cover note from them.

Remember to measure and track! Type up all comments, keep metrics on % positive, negative or neutral, and key issues. Track calls or emails with community members, and record attendance and key factors from each engagement session. Ask survey questions that can be asked again 1, 3, 5 and 10 years later to track changes in attitude and opinion over time.

CREATE ENDURING RELATIONSHIPS

On a partner and stakeholder level, continue to send system-wide updates, reports, and invitations to the growing group of supporters. Updates build patience and goodwill if

projects are delayed due to other priorities or circumstances—consider a bi-monthly or quarterly “insiders” email to partners and Champions that is more personal than general organization communications. Be an active partner with organizations and governmental bodies in promoting recreational and safety initiatives. At the community level, be present.

- Celebrate milestones with communities such as groundbreaking, openings or anniversaries.
- Establish a presence at local events providing updates, taking spot polls, sharing maps and other branded items.
- Disburse trained Champions to share general information, capture ideas, and respond to questions.
- Recruit volunteers for maintenance and possible program development and implementation.
- Support and encourage educational and recreational activities and adjacent parks, including programs and events for various ages and abilities.

CONCLUSION – SECTION 5

As with many of our plans, we'd like to close out with a thank you to our community—to our community members, elected officials, partners and staff: Thank you for voting to invest in this legacy for future generations. Thank you for entrusting us with your hard-earned tax dollars. Thank you for giving us crucial feedback. Thank you for taking a walk, for riding your bike, for going for a run, for breathing fresh air in the Town of Erie. Thank you for volunteering, for pitching in, for reporting conditions, for asking questions, for sending pictures, for sharing stories. Thank you for thinking about how you can help us in the work of community engagement. Thank you for making this amazing Town a more vibrant best place.

APPENDICE – SECTION 6

ENGAGEMENT HQ – ONLINE ENGAGEMENT PLATFORM

Engagement HQ is the online tool Erie has selected to build a long-term relationship with our community. This system lets us build community capacity, gather community knowledge, and interpret community needs.

- Multiple tools serve to engage residents while unique information-sharing tools support efforts to inform and educate
- Clients use a full array of videos, documents, image galleries, key dates, lifecycles, and other widgets to educate, build confidence in the process, and drive participation.
- A theming engine is constructed to assist with engagement through multiple landing page layouts that trigger curiosity, interest, and overall longer participation.
- Participant management helps you understand who you are hearing from and reach out to target groups.
- In-depth real-time reporting ensures effective and efficient listening.

EIGHT ENGAGEMENT TOOLS

EngagementHQ's range of eight engagement tools (shown below) make it easy to marry online and face-to-face methodologies. Through its platform approach we can mix and match the tools and turn them on, or off, to best support the engagement process. Projects' success criteria can be measured with the qualitative and quantitative data.



IMPLEMENTING THE ENGAGEMENTHQ TOOL

EngagementHQ can be structured and branded to support the Town of Erie's identity with custom theme options. Project pages are designed to be the one stop shop for all ongoing conversations.

HOMEPAGE TEMPLATE EXAMPLES



Whitehaven



Bondi

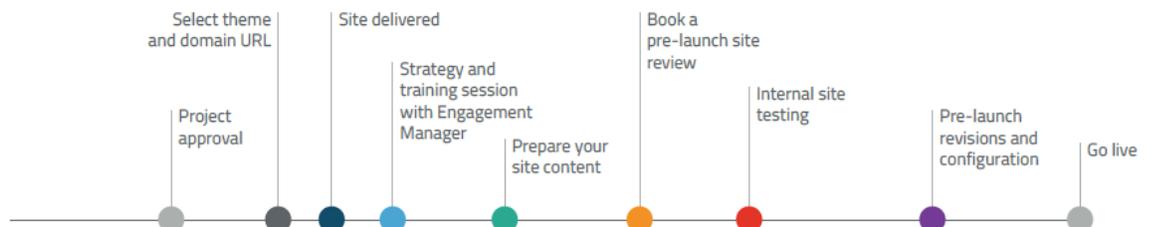


Torquay



Coral Bay

The Strategy and Success Planning includes choosing a theme and domain URL, identifying admins, configuring branding and logos, identifying which projects to test, configuring tools, widgets, and additional site content, as well as testing and revisions before the EngagementHQ goes live!



BRANDING ENGAGEMENTHQ FOR ERIE

Several years ago a similar tool was investigated using MySidewalk. It appears this was not strategized through fruition, albeit some excellent branding was created. The previously coined name was 'Engage Erie' and the site url for our new implementation could be EngageErie.erieco.gov



Promo Video: <S:\Administration\Communications & Marketing\Engage Erie\Mind Mixer Promo.mp4>

EXAMPLES

Many regional local governments have recently implemented Engagement HQ.

[Gilroy development projects](#)

[Guiding Golden](#)

[SpeakUp Arvada](#)

[San Antonio](#)

[Louisville - McCaslin Redevelopment](#)

[Boulder - Community Broadband](#)

[Boulder's promotional video](#)

[Fort Collins - Outdoor Burning](#)

[Greenwood Village](#) - notice their closed conversations