



# Public Engagement guide

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## Reference Material

- Public Notice and Engagement policy and procedures – oakville.ca
- Rzone procedure – oakville.ca
- Social Media Guidelines procedure – oakville.ca

## Acknowledgments

The Town of Oakville wishes to acknowledge  
the International Association for Public Participation (IAP2).

## **Why does the Town of Oakville have a public engagement guide?**

The Town of Oakville is a dynamic municipality that interacts with the public on hundreds of projects, studies, initiatives, services and programs every year. Whether we're letting our residents know about plans to create a new park, looking for feedback on a road improvement study or finding ways to enhance user experience at our community and cultural facilities...we want to hear from our community. The public engagement guide is our commitment to meaningful engagement and provides the framework for what engagement is to us. It provides a range of flexible techniques to engage the community in the activities and decision-making processes of the town.

### **Who should use this guide?**

Staff, Council and those assisting the town on a project, initiative, study or policy.

### **When should you use this guide?**

For small and large projects that may be short or long-term. There is no one size fits all for public engagement. Each project, initiative or study requires a unique approach and adapted techniques.

### **Not sure if your project or initiative needs a public engagement plan?**

Have a look inside! The guide provides a "how to" workbook.

## What is public engagement

Public engagement is any process that involves the public in problem solving and uses public input to help make decisions. It means regularly engaging the community on projects, studies, initiatives, services and programs. The five broadly recognized types of public engagement are:



### Sharing information

Providing timely and reliable information that is easy to find and understand.



### Consulting

Keeping the community informed, listening to and acknowledging input, and providing feedback about how public input influenced the decision.



### Involving

Working with the community to ensure that their concerns and aspirations are directly reflected in the alternatives developed and providing feedback on how public input influenced the decision.



### Collaborating

Looking to the community for advice and innovation in formulating solutions and incorporating their advice into recommendations to the maximum extent possible.



### Empowering

When decision-making is placed in the hands of the community like voting in municipal elections.

## The benefits!

- Public engagement helps us do a better job
- It brings attention to an important issue
- It identifies potential and existing concerns/areas of conflict before they escalate
- The process brings individuals and groups together to identify and/or develop recommendations and alternatives
- It helps interested parties understand complexities of an issue
- It builds support and shared ownership in the recommendation, implementation and/or evaluation
- It leverages the wealth of talent in our community
- It helps Council understand the needs and priorities of the community so decisions can be made with these in mind
- The benefits are long-term and the process is an investment in achieving Oakville's vision of being a vibrant and livable community for all

## Even more benefits...

- Having a plan helps identify key steps/considerations so nothing gets missed
- The plan integrates public engagement and communications in one place
- Ensures public engagement is a part of a complete project plan

## Our commitment

Public engagement is a key component of open and transparent government. It helps us develop and deliver quality programs and services and achieve our vision of being a vibrant and livable community for all.

This guide was developed from the town's Public Notice and Engagement policy and procedures to ensure open two-way communication with the community. It lays out a simple but comprehensive plan for public engagement that staff, Council and the public can rely on.

On some initiatives, public notice and engagement are mandated by legislation such as the Municipal Act or Planning Act and sometimes it is not, such as when we build a new facility or create a town budget.



This toolkit should be used for all types of engagement, legislated or not.



## Guiding principles

These guiding principles are the foundation for the town's engagement initiatives and strategies. Following the guiding principles is the most effective way to build trust and to demonstrate the town's commitment to the community.

1. **Inclusion and mutual respect** — ensuring public notice and engagement is based on building trust and relationships that seek to involve all members of the community.
2. **Indigenous engagement** – ensuring substantive consultation with Indigenous peoples for matters of significant interest to them.
3. **Early involvement and timely communication** — communicating as early as possible in the engagement process and ensuring that the information needed to meaningfully engage and understand the issue or project is available in a timely manner, so the community has sufficient time to actively participate and Council members have time to understand the issues.
4. **Options for participation** – providing a variety of opportunities for interested parties and the community to participate in engagement events where appropriate, such as in-person and/or virtual events, with consideration for timing (e.g. day and evenings) and at locations easily accessible by participants and close to or within the neighbourhood(s) being affected.
5. **Open interactive communication** — working with the community in a co-operative and collaborative way to share information and provide opportunities for open and constructive dialogue.
6. **Clear and accessible communication** — ensuring the use of plain language and a wide variety of formats and channels of communication.
7. **Transparent and accountable** — sharing information, open public engagement processes, careful consideration and evaluation of all feedback received and reporting back to Council before final decisions and outcomes are reached. Public input will be seriously considered but not treated as direction to staff.
8. **Fiscally sustainable** — ensuring methods and resources for public notice and engagement reflect the magnitude and complexity of the initiative.
9. **Environmentally sustainable** — ensuring the use of environmentally friendly public notice and engagement methods.
10. **Technology** – using technology including the town's website, e-Alert feature, social media platforms and other mediums to ensure there are different options available for people to access town information and notices.
11. **Continuous improvement** — evaluating and seeking better ways of engaging the community and providing efficient and effective public notice and engagement processes.



# Developing a public engagement plan

**A successful public engagement process involves five key steps.**

**1**

**Define**

the project, interested parties and level of community impact

**2**

**Determine**

the strategy, choose techniques, establish measures and timelines

**3**

**Implement**

the public engagement plan

**4**

**Make**

recommendations and share results

**5**

**Evaluate**

the outcome



Keep in mind! Make sure you give Mayor and Councillors advance notice of both town-wide and ward specific meetings.



# 1. Getting started

**Define the project and decision to be made, list interested parties, determine level of community impact.**

**Define the project/issue/opportunity that needs to be addressed, answered or resolved.**

In most projects, there are usually elements that cannot be influenced. This may be due to budget, safety or legislative requirements. These elements are the “non-negotiables” and need to be communicated to interested parties at the beginning of the engagement. Do you have any? What are they?

**List internal and external interested parties.**

See potential interested parties on next page to help.



Remember to connect with Corporate Communications early in the planning stage. After a draft plan is started, let them know about the project and ask about any advice or support they may be able to provide.



## Potential interested parties

### General Public

- ☐ Those directly affected
- ☐ Those indirectly affected

### Groups and Organizations

- ☐ Indigenous peoples
- ☐ Residents associations
- ☐ Businesses and business associations
- ☐ Sport and recreation groups
- ☐ Health organizations and associations
- ☐ Cultural groups and associations
- ☐ Professional associations
- ☐ Environmental groups
- ☐ Charities and service clubs
- ☐ Places of worship and religious organizations
- ☐ Not-for-profit organizations

### Government Institutions

- ☐ Town agencies, boards, commissions
- ☐ Other municipalities
- ☐ Provincial government
- ☐ Federal government
- ☐ School boards and local schools

### Town Council

- ☐ Mayor and Members of Council

### Town business units and departments

Interdepartmental communication is important. Other departments may help identify potential interested parties.

- ☐ Town's accessibility advisory committee
- ☐ Town's heritage committee



Keep in mind! Anyone who is affected by a decision should have the opportunity to be involved in some way in the process. Not all parties will be impacted in the same way or have the same level of interest in a project. Knowing your interested parties will help choose the best engagement techniques to use (i.e. youth may want to participate through social media, or to reach the silent majority you may want to use a survey or post mobile signs in the community).



Keep in mind! Interested parties do not have endless amounts of time to offer so give them the opportunity to have a meaningful impact on your project. Do not ask for input that cannot or will not be used.

## **Determine the level of community impact.**

Use the criteria below to determine the level of community impact of your project. The level of impact will help determine the public engagement goal and techniques to use.

### **Level 1 Local area/group | Inform**

- Low level of real/perceived impact or risk on local area, small community or user group(s) of a specific program, service or facility in local area
- Small change or improvement to a program, service, facility
- Low or no risk of controversy or conflict in local area
- Issues or initiatives that are routine
- Providing information to the public (one-way communication) is most effective

### **Level 2 Town-wide | Inform**

- Low level of real/perceived impact or risk across the town
- Low or no risk of controversy or conflict in local area
- Issues or initiatives that are routine

### **Level 3 Local area/group | Inform, Involve, consult or collaborate**

- Moderate to high level of real/perceived impact or risk on local area, small community or user group(s) of a specific service or facility
- Loss of or significant change to any facility, program or service to a local community
- Potential high degree of controversy or conflict
- Any impact on health, safety or well-being

### **Level 4 Town-wide / Inform, involve, consult or collaborate**

- Moderate to high level of real/perceived impact or risk across the town
- Significant impact on attributes that are of high value to the town, such as Council's strategic goals
- Any impact on health, safety or well-being
- Potential high level of interest across Oakville
- Potential high impact at provincial or federal level

An iceberg floating in a blue ocean under a blue sky with white clouds. The visible tip of the iceberg is small, while the much larger submerged part is visible below the water line, illustrating the concept of visible vs. invisible strategy.

## 2. Determine the strategy

**Determine the public engagement strategy, choose techniques to engage the community, establish measures, confirm timelines and resources**

**Determine the public engagement strategy.**

There are five types (goals) of engagement:

- Inform
- Consult
- Involve
- Collaborate
- Empower

Identify the overall public engagement goal. Refer to the next page for descriptions.








Keep in mind! You may use more than one type of engagement but in this section you want to identify the overall engagement goal for the project.

## Five types of public engagement

These levels are based on the International Association for Public Participation.

	What does it mean	Examples
 <b>Inform</b>	<ul style="list-style-type: none"> <li>Notify interested parties of an issue, project, decision</li> <li>To provide information to assist in understanding the topic, options, solutions and/or decisions</li> <li>To prepare interested parties for more forms of engagement</li> </ul>	<ul style="list-style-type: none"> <li>Advising the community of a situation or proposal</li> <li>Informing on a decision or direction</li> <li>No response is required, but people may have opportunities for further participation</li> </ul>
 <b>Consult</b>	<ul style="list-style-type: none"> <li>Obtain public feedback into the priorities or decisions, usually at one point in the project planning or implementation process</li> </ul>	<ul style="list-style-type: none"> <li>Seeking comment on a proposal, action or issue</li> <li>Seeking feedback on a service or facility</li> <li>Requiring a response but limited opportunity for dialogue</li> <li>Option for people to seek a further level of participation</li> </ul>
 <b>Involve</b>	<ul style="list-style-type: none"> <li>Work directly with interested parties throughout the process so aspirations and concerns are consistently understood and considered prior to decision-making</li> </ul>	<ul style="list-style-type: none"> <li>Involving the community in a discussion or debate</li> <li>Ensuring informed input through briefings and information</li> <li>Adopting a more personal and innovative approach through person contact and meetings/session that encourage participation</li> <li>Involving interested parties at different times in the planning process (i.e. keeping informed and enabling further comment)</li> </ul>
 <b>Collaborate</b>	<ul style="list-style-type: none"> <li>Partner with the community in the development of options and/or a preferred solution</li> </ul>	<ul style="list-style-type: none"> <li>Establishing a structure for involvement in decision-making (i.e. committee)</li> <li>Enabling ongoing involvement and keeping informed</li> <li>Allocating responsibility in achieving initiatives</li> </ul>
 <b>Empower</b>	<ul style="list-style-type: none"> <li>Place final decision-making in the hands of the community (limited application)</li> </ul>	<ul style="list-style-type: none"> <li>Establishing a process that allows the public to make an informed decision</li> </ul>

	Our promise to the public	What does it look like?	Examples
<b>Inform</b>	<ul style="list-style-type: none"> <li>We will keep you informed</li> <li>We will provide timely and reliable information that is easy to find and understand</li> </ul>		<ul style="list-style-type: none"> <li>Website</li> <li>Open house</li> <li>Fact sheet</li> </ul>
<b>Consult</b>	<ul style="list-style-type: none"> <li>We will keep you informed, listen to and acknowledge input, and provide feedback about how public input influenced the decision</li> </ul>		<ul style="list-style-type: none"> <li>Focus group</li> <li>Survey</li> </ul>
<b>Involve</b>	<ul style="list-style-type: none"> <li>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</li> </ul>		<ul style="list-style-type: none"> <li>World café</li> <li>Tour</li> </ul>
<b>Collaborate</b>	<ul style="list-style-type: none"> <li>We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations to the maximum extent possible</li> </ul>		<ul style="list-style-type: none"> <li>Citizen panel</li> <li>Advisory committee</li> <li>Charrette</li> </ul>
<b>Empower</b>	<ul style="list-style-type: none"> <li>We will implement what you decide</li> </ul>		<ul style="list-style-type: none"> <li>Ballot</li> <li>Referendum</li> <li>Citizen jury</li> </ul>






## Identify the public engagement tools and techniques.

There are many online, in-person and media/advertising techniques below. For descriptions, see Appendix A. Remember to review the Public Notice and Engagement policy and procedure for notice requirements and time frames. Use the next page to identify the tools and techniques.

### Tools and techniques

The symbols provide an easy way to identify how a tool or technique can be used multiple ways. For example, a survey can be online and in-person (phone or handout).



#### Online ( )


Citizen panel   
E-newsletter   
Survey   
Voting



Fact sheet, FAQs   
Oakville Idea Forum  
Town Hall/public meeting   
Website

Email   
Social Media   
YouTube


#### In-person ( )

Advisory group, committee  
Comment form, card   
Focus group  
Kitchen table discussion  
Public hearing  
ServiceOakville   
Telephone hotline  
Workshop

Charrette  
Dot stickers  
Information kiosk  
Open house  
Public information centre  
Symposium  
Tour/field trip   
World café

Citizen jury  
Fair, event  
Interview   
Presentation   
Public information meeting  
Task force  
Voting pad “clickers”

#### Media/Advertising ( )

Digital screens  
News release 

Mobile sign  
Poster

Newspaper   
TV, radio



Keep in mind! Accessibility considerations of the participants, location and materials. Public engagement efforts should reflect the magnitude and complexity of the project or issue.

## Tools and techniques.

Your corporate communications advisor can help you decide on the most effective strategies and tools of engagement and help create a communications plan (Appendix B) to go hand-in-hand with the public engagement plan.

Technique	Description	Audience	Timing	Cost/resources

## Establish measures.

Measuring expected outcomes is important to evaluating whether you have achieved the objective of engagement. Measures may include:

- Approval of the recommendations/resolution of the issue
- Completion of the project on time and within budget
- Satisfaction with the process



# 3. Implement

## Communicate the plan and conduct the engagement.

### Communicate the plan.

Communicating the plan is important to the success of public engagement. Different communication strategies may be needed for different types of engagement. By involving Corporate Communications in steps 1 and 2, you should be ready to get the message out.

### Conduct the engagement.

The goal of all engagement activities is to provide participants with an experience that is welcoming, easy to participate in and efficient. Ensure proper time and resources have been allocated so there is meaningful engagement and input.



Keep in mind! Flexibility is important. For example, if the scope of the project or level of community impact changes, you will need to refine the engagement methods

Logistics are key. When engagement is in-person, choose locations near impacted groups that are accessible or when online, provide background material.



# 4. Recommend and share

## **Make recommendations, share the results.**

You will want to review all public input and other critical information you have researched or collected to help determine the course of action. Confirm adequate participation and input was achieved during the public engagement opportunities. Ensure recommendations to Council are clear, achievable and contribute to the town's vision to be a vibrant and livable community for all.

## **Communicate the results.**

It is important to inform the internal and external interested parties of outcomes, decisions and next steps. They will value the follow-up and rationale for the decision.

## **Be sure to report:**

- What decisions were made
- Why those decisions were made
- How public input was used

## **Things to consider:**

- Who do you need to communicate the decision and rationale to?
- How will you report the findings from your engagement process? What findings will you present? What format will you use? (i.e. online, electronic or printed report, detailed or summary document). How will you promote and distribute your findings?
- How will you manage feedback/reaction to the decision and rationale?



Keep in mind! The follow-up reporting should be done through similar communication methods used throughout the public engagement process.



# 5. Evaluate

## **Evaluating the public engagement process and outcome.**

### **Evaluate the process and outcome.**

It is important to understand what went well and what could be improved in future. It is recommended that the project lead and communications lead complete the worksheet on the next page together and share with the project team.

## **Congratulations you have completed your public engagement plan!**



Keep in mind! There are a number of ways to evaluate the process (in addition to the worksheet on the next page). These can include informal discussions, interviews, questionnaires and evaluation forms.



## Evaluation worksheet

**Project name:**

**Date of evaluation:**

**Project Lead:**

**Communications Lead:**

	No	Partial	Yes
1. The public engagement process was followed	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
2. The issue was clearly defined before starting	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
3. The engagement goal reflected the magnitude and complexity of the project	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
4. The level of community impact was accurate	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
5. Appropriate interested parties were identified	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
6. A variety of engagement techniques were considered to reach and involve interested parties	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
7. Project results were communicated to interested parties.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
8. Measures were identified and achieved	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
9. The process stayed within allocated time, budget and resources	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
10. The recommendations were clear, achievable and contributed to the town's vision	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>

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

**From 1.0 – 1.5 Poor**

**1.6 – 2.0 Fair**

**2.1 – 2.5 Good**

**2.6 – 3.0 Excellent**

**Key questions to consider during the evaluation:**

- Did the process reach the right people and ask the right questions?
- Did the people who got involved feel they were heard?
- Did the answers tell you what you needed to know?

**What went well?**

**What can be improved for next time?**

## Project example: An example on how many techniques might be used in one project.

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

**Interested Parties:** Oakville community, sports and recreation groups, cultural groups, residents in the ward

**Level of Community Impact:** 4

Steps/stages of the project	Engage the public?	Public engagement goal	Technique
Announce funding and beginning of project	Yes	Inform – share information to prepare for involvement and generate interest	<ul style="list-style-type: none"> <li>• Information on website</li> <li>• News release</li> </ul>
Determine what services and programs to provide	Yes	Consult and Involve – obtain ideas and suggestions from the community and other interested parties	<ul style="list-style-type: none"> <li>• Online survey</li> <li>• Comment cards</li> <li>• Workshop</li> <li>• World café</li> <li>• Focus groups with user groups</li> </ul>
Complete preliminary design and site plan concepts	Yes	Consult - interested parties will have the opportunity to provide feedback on user needs	<ul style="list-style-type: none"> <li>• Open house</li> <li>• Focus group</li> </ul>
Complete design details of building	No	n/a	n/a
Issue and complete a request for quotations	No	n/a	n/a
Construction starts	Yes	Inform – keep public engaged and reduce concerns/questions	<ul style="list-style-type: none"> <li>• Information on website</li> <li>• News release</li> <li>• Email to targeted interested parties</li> <li>• Twitter, Facebook</li> </ul>
Evaluate building and move in	No	n/a	n/a
Hold a grand opening ceremony	Yes	Inform – invite the public to attend a ribbon cutting ceremony and activities	<ul style="list-style-type: none"> <li>• Information on website</li> <li>• News release</li> <li>• Email invite to targeted interested parties</li> <li>• Twitter, Facebook</li> </ul>

# Appendix A: Tools and techniques

**Ensure everyone feels welcome and can participate – accessibility and inclusion are essential!**

Choose a venue that is accessible (see our accessible meeting checklist), ensure information and materials are in plain language and available in alternate formats (such as large font or an accessible PDF online) and communication supports have been planned as requested (such as ASL interpreters).

# Online

**Note: When considering various tools and techniques, the Town of Oakville's website should always be priority (listed at the end of this section)**

## **Citizen panels**

A demographically representative group of residents to carefully examine an issue. A panel is usually tasked to provide recommendations or undertake research of a pending decision. Members are randomly selected, often through a civic lottery process.

Type of engagement: Collaborate

Level of community impact: 3-4

Considerations: A panel may provide feedback on more than one issue or on one issue more than one time; Involves residents providing feedback on a public problem or issue;

Time and resource intensive.

## **Email**

Provide information to interested parties and solicit input from the community.

Type of engagement: Inform, consult

Level of community impact: all

Considerations: Medium to high amounts of time are needed to read, respond and direct input; Ensure there is a way to analyze responses to make data useful; Refer to the town's Electronic Messages and Anti-spam Compliance procedure for proper use.

## **E-newsletters**

Online newsletter to promote town programs, services and events, latest community news, council decisions, and engagement opportunities.

Type of engagement: Inform

Level of community impact: all

Considerations: the town has an e-newsletter distributed weekly to subscribers email inbox directly – contact Corporate Communications to see if this can be used for your project or issue; there are also e-newsletters for specific projects and departments.

## **Facebook**

Social networking website where meetings, events, photos, programs, services can be shared with followers (registered users). Followers can also provide feedback.

Type of engagement: Inform, consult

Level of community impact: all

Considerations: Social media offers a platform for discussion/feedback for those who cannot or do not want to attend in-person activities. But remember that many popular social media platforms are not fully accessible; Followers may share your message so the potential audience reach is significant; Time/expertise needed to monitor and respond; Corporate communications drafts and shares information for the town.

**Fact sheets, FAQ's**

Provide information about a particular issue or project, usually one page on town website or print out.

Type of engagement: Inform

Level of community impact: all

Considerations: Consider using question and answer style; Opportunity to clarify information that is easy to read and reduces public concern; Minimal cost, depending on distribution but low-to-medium staff effort to gather information and prepare effectively.

**Oakville idea forum**

Online engagement tool where participants share their opinions and ideas and vote or comment on others.

Type of engagement: Consult

Level of community impact: 3-4

Considerations: The town poses a question about a topic or project to gauge community ideas and opinion. Residents provide ideas and can vote on ideas posted by others. Set a duration of time for keeping the forum active – can be real time or over a period of time; Time/expertise needed to monitor and respond; Social media offers a platform for discussion and feedback for those who cannot or do not want to attend in-person activities. But remember that many popular social media platforms are not fully accessible.

**Surveys (online, phone, mail, in-person, hand-out)**

Surveys are a good way of getting a snapshot of opinions across a wide range of demographic groups. It is critical to understand if the project/issue requires statistically valid data or qualitative input (or both), this will determine what type of survey to use.

Type of engagement: Consult

Level of community impact: 3-4

Considerations: Significant time to develop a valid and reliable survey, can be costly; Questions should be worded carefully so as not to influence an outcome; Surveys work well for needs assessments and satisfaction levels for a representative number of people, particular group or the entire community.

**Town Hall/public meetings (online, in-person)**

An organized large group meeting usually used to make a presentation and give the public an opportunity to ask questions and give comments. Public meetings are open to the public at large.

Type of engagement: Inform, consult

Level of community impact: 3-4

Considerations: Facilitators need to establish open and neutral environment for all views to be shared; Emotions can be high and one perspective can dominate; People learn by hearing others' questions and comments; See our public meeting checklist.



## **X (formerly Twitter)**

Social media messaging tool where brief messages are shared with followers.

Type of engagement: Inform, consult

Level of community impact: all

Considerations: Messages are brief, must be under 140 characters; Social media offers a platform for discussion/feedback for those who cannot or do not want to attend in-person activities. But remember that many popular social media platforms are not fully accessible; Can be used to inform of issues (such as service disruptions), upcoming meetings, events, programs; Followers may re-tweet your message so the potential audience reach is significant; Time/expertise needed to monitor and respond; Corporate communications drafts and shares tweets for the town.

## **YouTube**

YouTube is a video sharing service that allows users to watch videos posted by other users and upload videos of their own.

Type of engagement: Inform, consult

Level of community impact: 3-4

Considerations: The site allows users to upload, view, rate, share, and comment on videos.

## **Voting**

The official choice you make in an election, meeting, etc., by casting a ballot, raising your hand, speaking your choice aloud.

Type of engagement: Collaborate, empower

Level of community impact: 5

Considerations: Substantial cost to ensure voting process is valid; Intensive staff resources; Encouraging the public to vote is important.

## **Website**

Use to provide information on programs, services, projects, initiatives, etc.

Type of engagement: Inform

Level of community impact: all

Considerations: Websites can make information accessible and available to people who have vision loss, learning disabilities or difficulty getting to public meetings; Time and resource/expertise are required to create and maintain content

# **In-person**

## **Advisory group, committees**

A group of people that provide input on a project or initiative.

Type of engagement: Consult, involve, collaborate

Level of community impact: 3-4

Considerations: Define the terms of engagement up front and the level of decision-making responsibilities they hold; Volunteers must often dedicate substantial time; Staff time to support and resource the committee can be substantial; One perspective can dominate discussion; See Establishing an Advisory Group Guide attached.

## **Charrettes**

The charrette is an intense problem-solving session where a facilitator leads a group to alternative solutions. Charrettes are often used to design such things as parks and buildings, or to plan communities or transportation systems. The charrette team develops solutions resulting in a clear, detailed, realistic plan for future development.

Type of engagement: Involve, collaborate

Level of community impact: 3-4

Considerations: Trained facilitator is necessary; Be clear on the promise to participants about how their input will be used; Process is intensive and can be expensive; Use of visual techniques in framing issues is helpful; Promotes joint problem solving and creative thinking.

## **Citizen juries**

A randomly selected and demographically representative panel of residents to carefully examine an issue and provide input. As the word “jury” suggests, this group provides a recommendation or may be empowered to make the decision on behalf of the decision-maker, and a consensus decision is usually required.

Type of engagement: Collaborate, empower

Level of community impact: 3-4

Considerations: Jury is informed by several perspectives, often by experts. Jurors then go through a process of deliberations where subgroups may be formed to focus on different aspects of the issue. Jurors produce a decision or recommendation in the form of a citizens’ report. Usually a 3-5 day process; Involves residents in developing a thoughtful, well-informed solution to a public problem or issue; Time and resource intensive; Jury is disbanded once the decision is made.

## **Comment forms, cards**

A form given to people to provide feedback and return.

Type of engagement: Consult

Level of community impact: 3-4

Considerations: Effective questions take time to create, ensure they solicit information that is useful for decision-making; Plan to accept feedback in a variety of ways. For example, some people with low vision may prefer to give verbal rather than written feedback; Results may not be representative of larger population.

## **Dot stickers**

Dot stickers (any kind of sticker) are used to allow participants to weigh-in real time during meetings, events, etc.

Type of engagement: Consult

Level of community impact: 1-4

Considerations: Used in the same way as voting pads but participation is not usually anonymous; Provides immediate feedback from participants to help guide a conversation or gauge participants’ understanding or feelings on an issue. They can be used to identify priorities; Be clear about the objective of using stickers. Facilitator is necessary.

### **Fairs, events**

Use to build awareness or provide and share information about issues through exhibits and interactive activities.

Type of engagement: Inform, consult

Level of community impact: 3-4

Considerations: Opportunity to highlight a project or initiative and share information to a targeted and/or large audience; Conducive to media attention; May be expensive with high degree of organization. Be prepared for crowds if advertised widely; Weather could play a factor if outdoors.

### **Focus groups**

Small selected group that are formed to test ideas, messages and gauge public opinion.

Type of engagement: Consult

Level of community impact: 3-4

Considerations: Skilled facilitator is necessary to encourage better levels of dialogue to allow for insights, perspectives, ideas and suggestions; six to eight participants is ideal; Be clear about the objective when inviting participants; If you are doing more than one focus group, use the same process and questions so the results are comparable.

### **Information kiosks**

A station where information is available. Can use to solicit input.

Type of engagement: Inform, consult

Level of community impact: 3-5

Considerations: Can be permanent or temporary; Staff resources needed to maintain and monitor; Can use technology to make the kiosk interactive and to gather comments.

### **Interviews**

A one-on-one meeting or small group discussion focused on a specific project or issue.

Type of engagement: Inform, consult

Level of community impact: 3-4

Considerations: An interview requires an established format with a set number of questions. Do not be tempted to ask too many questions as people will likely speak for longer than expected. Four to six questions are ideal; Provide interviewees with information beforehand; Useful to share your notes with the interviewee afterwards to ensure you captured all the main points; More than one interview should be done with each interest group to make sure the information gathered is representative and valid; Can help build rapport; Time needed to develop effective questions and approaches upfront; Costs can increase if providing food and travel.

### **Kitchen table discussions**

Also known as “coffee klatches” are informal meetings of community members (without staff involvement) to discuss specific issues and share feedback.

Type of engagement: Consult

Level of community impact: 3-4

Considerations: Preparing a good kitchen table guide is essential – it should include background information, discussion questions, and a form for completing feedback and sending back to the project team; It can be difficult to get significant uptake as these are mainly community-driven.

### **Open houses**

Exhibits, plans, materials and are displayed in a station format where the public is invited to tour through.

Type of engagement: Inform, consult

Level of community impact: 2-4

Considerations: Open houses were traditionally static information sharing events, however by including interactive stations, and other ways of providing input, they can be exciting and appealing to a wide range of people; Excellent opportunity to educate; Fosters small group or one-on-one communication; Preparation of materials, handouts, speakers and displays could be costly; Staff at open house should be well briefed; May be difficult to document public input but can be used in combination with other ways to gather feedback such as using comment cards; One perspective can dominate discussion.

### **Presentations**

Presentations to organizations throughout the community is an excellent way of building relationships and doing outreach.

Type of engagement: Inform

Level of community impact: 1-4

Considerations: Presentations are more likely to be well attended if they piggyback onto existing meetings; Make a special effort to meet with groups that are harder to engage, such as youth and new town residents, as they are often underrepresented in public processes; Ensure your presentation is short and simple, as there will likely be questions. Do not overwhelm your audience with too much information or jargon. Speak clearly to your audience; Provide handouts so that people can review later.

### **Public hearings**

Official meetings where individuals or groups are invited to make presentations. May be formal or quasi-judicial meeting with legislated requirements. Typically used to satisfy regulatory requirements. Dialogue is time-limited. Comments are recorded.

Type of engagement: Involve, collaborate

Level of community impact: legislated

Considerations: Designed around one specific issue; Staff experts needed to attend and speak to issues, can be time intensive to prepare for hearing and costly; Examples include: Ontario Municipal Board (OMB) and Licensing Appeal Committee. Feelings of conflict may accompany this type of activity, ensure neutral environment.

**Public Information Centre (PIC)**

Use to provide information and receive public feedback on road/ engineering projects from traffic calming to road design.

Type of engagement: Inform, consult

Level of community impact: 1-4

Considerations: Drop-in event with visuals (story boards) provided; Fosters one-on-one communications; Staff provide information and answer questions as needed. Consultant usually present to answer questions; Comment cards should be available; Non-statutory unless chosen as public engagement type for class Environmental Assessments.

**Public Information Meeting (PIM)**

Use to provide information and receive public feedback on development applications.

Typically a PIM is held before recommendations to Planning and Development Council.

Type of engagement: Inform, consult

Level of community impact: 3-4

Considerations: Non-statutory meeting held prior to legislated Planning and Development Council meeting; Usually a workshop setting. Town planner makes a brief presentation; Staff resources needed to attend meeting, provide information and answers questions as needed.

**ServiceOakville**

The town's main point of contact.

Type of engagement: Inform, consult

Level of community impact: all

Considerations: Staff are available Monday to Friday 8 a.m. to 5 p.m.

**Symposium**

A meeting or conference to discuss a particular topic. This may involve multiple speakers and multiple aspects of the topic.

Type of engagement: Inform, consult

Level of community impact: 3-4

Considerations: Intended to expose participants to multiple aspects/views on one topic; Facilitator is necessary; Can be costly to bring in speakers.

**Task force**

A small group of people or experts formed to develop a set of recommendations, policy or proposal within a limited time.

Type of engagement: Involve

Level of community impact: 3-4

Considerations: Task forces should be kept small with clear guidelines; Findings of a task force of independent or diverse interests will have greater credibility; Staff support/prep time is intensive; Be prepared to work through to compromise.



### **Telephone hotlines**

Use to take calls from the public to gather information about issues or gauge concerns. Also used to provide information.

Type of engagement: Inform, consult

Level of community impact: 3-4

Considerations: Provide updates on project activities so people don't get "the run around" when they call. Create effective message with concise information; Controls information flow and promotes image of accessibility; If telephony is in place, costs are minimal; Have designated contact for prompt and accurate responses.

### **Tours and field trips – guided and self-guided**

Group tours of a specific site or sites.

Type of engagement: Inform, consult, involve, collaborate

Level of community impact: 3-4

Considerations: Opportunity for people to acquire greater knowledge about an issue or project; Opportunity to build rapport; Costs of transportation must be considered; Intensive planning and organization needed by staff; Can be used to consult, involve or collaborate by providing an opportunity for people to discuss issues.

### **Voting pads**

Also called clickers or audience response technology

Voting pads are hand-held devices that allow participants to weigh-in real time during meetings, events, etc. anonymously.

Type of engagement: Consult

Level of community impact: 1-4

Considerations: Provides instant feedback from participants to help guide a conversation or gauge participants' understanding or feelings on an issue. They can be used to identify priorities; Often participants are asked to choose an option among multiple choice answers; they can be used to make the teaching session more interactive and engaging; Be clear about the objective of using voting pads; Facilitator is necessary.

### **Workshops**

A meeting where a group of people (can be small or large) engage in intensive discussion/ activity on an issue and/or develop solutions.

Type of engagement: Involve, collaborate

Level of community impact: 3-4

Considerations: No more than 25 per cent of workshop time should be dedicated to providing information; Ensure larger workshops offer opportunities for everyone to participate; Participants should have opportunity to provide feedback; Excellent for discussions on criteria or analysis of alternatives; Ability to draw on other team members to answer difficult questions and fosters small group communication; Several small group facilitators are necessary; Hostile participants may use a "divide and conquer" approach of breaking into smaller groups.

## **World cafés**

A meeting with an informal environment often modeled after a café. Groups of people discuss a topic in response to predetermined questions at several tables. Participants change tables during the process and focus on identifying common ground in response to each question.

Type of engagement: Involve, collaborate

Level of community impact: 3-4

Considerations: The setting should feel inviting and not as formal as a standard meeting format, i.e. small round tables covered with a tablecloth, coloured pens, vase of flowers, about four to five chairs at each table; The process begins with presenting questions to the large group about the specific issue or project and desired purpose of the world café. There are three (or more) 15-25 minute rounds of conversation for the small groups where each table deals with one question. At the end of each 15-25 minute round, each member of the group moves to a different new table. Staff or other designated facilitator/note taker should be the “table host” for the next round, who welcomes the next group and briefly fills them in on what happened in the previous round; After the small groups (and/or in between rounds), individuals are invited to share insights or other results from their conversations with the rest of the large group. The results can be collected visually, using a graphic recording (i.e. flip chart with written ideas or post-it notes) in the front of the room.

# **Media/Advertising**

## **Digital screens**

Digital screens at Town Hall, community centres and arenas to provide information, meeting dates/times and to promote town programs, services and events.

Type of engagement: Inform

Level of community impact: all

Considerations: Reaches those who attend town facilities in-person; Corporate Communications designs digital screens, involve them early in the process.

## **Mobile (road) signs**

Signs placed by the road to advertise a meeting or event.

Type of engagement: Inform

Level of community impact: 3-4

Considerations: Reach those who travel by the sign; Information must be easily conveyed; Signs must be placed in accordance with the town’s sign by-law. There are six specified locations to erect the sign, only three at a time. There is a fee; There is a dedicated staff contact in Engineering and Construction who coordinates placement.

## **Newspaper/Online advertisements**

Limited use since Oakville no longer has a local newspaper. Larger GTA newspapers may be used if deemed appropriate and of value. Online news outlets may be used when appropriate to provide information or promote an event, project, program, service.

Type of engagement: Inform

Level of community impact: 2-5

Considerations: Medium cost; Medium time; Use plain language.

### **News releases**

Use to inform media of an issue, project or event, town positions/ statements, progress on projects or in response to events that have occurred that require a town response.

Type of engagement: Inform

Level of community impact: 3-5

Considerations: Corporate Communications issues news releases for the town, involve them early in the process.

### **Posters**

Use to provide information/promote event, project, program, service.

Type of engagement: Inform

Level of community impact: all

Considerations: Graphic depictions work well. Use colour contrast where appropriate to improve accessibility; Printing costs; design expertise.

### **Television, radio**

Use radio talk shows and community TV segments to present information (and elicit response) to a broad audience.

Type of engagement: Inform

Level of community impact: 3-4

Considerations: People may take the time to watch/listen rather than read; Can be expensive if you are buying the time; Develop tools to measure impact on audience.

# Appendix B: Communication Plan

## **Background**

One paragraph.

What is the situation we are facing? What do we know for sure? What led to this project? What is the strategic priority? What is the history/evolution of the project to date? Include a SWOT (Strengths, Weaknesses, Opportunities and Threats) where applicable.

## **Business goal**

What do you hope to achieve with this project? What are the expected outcomes vs outputs? Is your measure of success tied to the outcome (ie. increased revenue, participation)? Is this a new policy or program? Are we trying to fix a problem?

## **Communications objective**

How will communications support the client in achieving the business goals? What are the expected communication outcomes? How would you measure successful completion of the objectives? (Objectives need to be SMART – Specific, Measureable, Achievable, Realistic and Timely). The objectives need to directly link to the measurement/evaluation pieces in your plan.

## **Research and analysis**

What don't we know about the problem, audience perception, awareness, knowledge or behaviour? What type of research is needed and/or doable? I.e. Primary – poll, survey, enviro scan

Secondary – review existing materials such as previous survey results, literature, media coverage, audience perception, reports, etc.

## **Target audience(s)/key interested parties**

Who is most affected by this project and has a stake in the process/outcome? Who needs to buy-in? Who needs to know? The client usually knows the audience and can assist you in establishing this list. Keep in mind demographic information to assist you in determining what tactics are best suited to the audience.

## **Key messages (telling the story...)**

1. The Vision: Should link to the Strategic Plan
2. The Value: Should clarify the value of the project – what will it achieve?  
Why is it important
3. The Differentiator: What is unique, different, exciting about this project?
4. Call to Action: What do we need you to do, what is the process?

## Communication roll out

Each communications strategy should try to follow the SMART formula if possible, and should leverage the other. Ideally, strategies should move the target audience from awareness, to knowledge, to perception, to behaviour. Depending on the stage of the issue and/or campaign you may choose one or all of awareness, knowledge, perception or behaviour.

Strategy 1:

Strategy 2:

Strategy 3:

Strategy 4:

Tactics	Detail	Audience	Timing	Cost	Status

## Evaluation

Remember to evaluate outcomes, not output. For example: How many people attended an event and what was the overall sentiment vs. how many posters were sent out promoting the event.

Objective and/or strategy	Measure (one measure could cover all of them)	Outcome/result

## Post mortem results:

A post mortem should be conducted following every survey and the results/ comments from those meetings should be included in this evaluation section.

## Approvals:







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