

100

Great Community Engagement Ideas



Tips, tricks, and best practices to help
guide planners to better results!

Guidebook by Dave Biggs, Stephen Stansbery, and Michelle Nance



Introduction

There are many benefits to great community engagement for planning projects. Successful engagement can inform and shape plans that better meet the needs of the community, generate much needed stakeholder support, and save time and resources by facilitating plan implementation.

Great community engagement means hearing from a large and diverse audience and collecting meaningful public input to inform decisions. While each situation is unique, there are many proven strategies that can be used by project teams to tame emotional stakeholders, engage even hard to reach populations, and collect informed input to get the best out of their community engagement.

The challenge is that public participation for planning projects has never been easy, and in many communities, it's getting more difficult. Agencies frequently complain about low turnouts at public meetings or emotionally-charged opposition from individuals or groups.

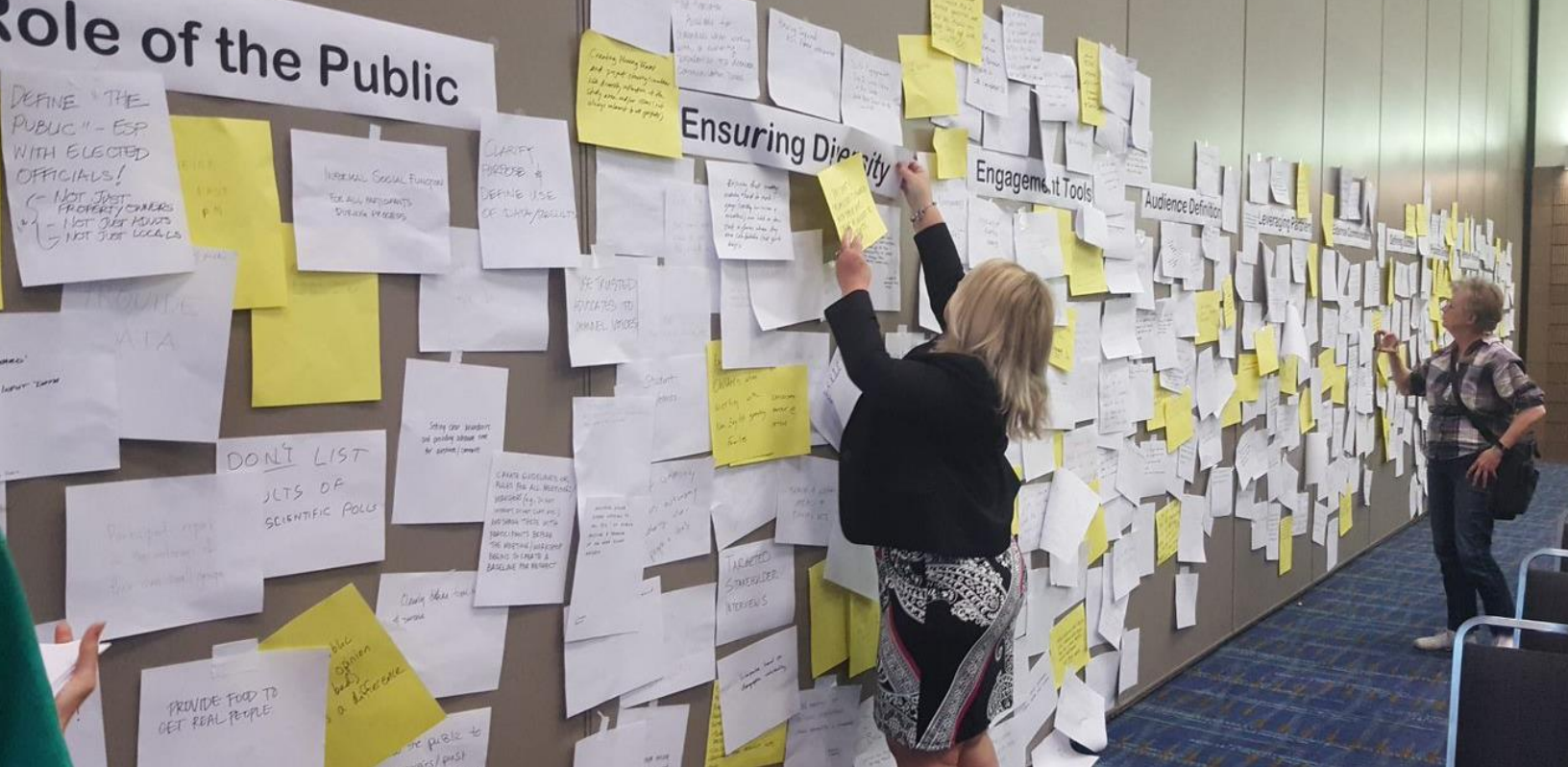
While it's evident that, for many agencies, community engagement is in crisis, there are plenty of planning agencies that are achieving outstanding results. We have many reasons to be optimistic.

A Community Engagement Guidebook for Planners by Planners

What inspired this guidebook? It was time to take stock of what's working well across the country so that *all* agencies can benefit from the tactics that have led to success. While planners and public engagement professionals have their share of success stories, tips, and best practices, it was also clear that a critical resource was missing: a guidebook to help project leaders design outstanding public participation programs that fit their project goals and budgets.

In April 2018, over 150 members and friends of the American Planning Association came together to brainstorm great community engagement ideas.





While we are simply stewards of their great ideas, let us introduce ourselves: Dave Biggs, Chief Engagement Officer at MetroQuest, Michelle Nance AICP, Planning Director at the Centralina Council of Governments, and Stephen Stansbery AICP, National Mobility Planning Practice Leader at Kimley-Horn.

This year, at the American Planning Association National Planning Conference in New Orleans, we facilitated a workshop entitled “Public Engagement Gone Wild? Taming Tactics!” attended by planners from across the nation. They generated over 500 ideas, tips, and strategies for great community engagement.

In this guidebook, we’ve amalgamated, categorized, and summarized the best 100 tips for success. It is designed to help planners and public engagement teams create and implement public participation programs that are open, transparent, and welcoming to all community members, while also ensuring that the process is resilient and robust, guarding against the possibilities of bias, intimidation, and sabotage by community groups or individuals seeking to disrupt the process.

We have divided the community engagement process into nine key components. For each section, you’ll find a series of questions to spark your thought processes and a list of ideas and tips. It’s our hope that referencing this guidebook early in the project design process will become standard practice for all planning and engagement teams. These questions and lists are meant to spur discussions and generate ideas to help you develop the most effective public participation plan possible for your projects. Feel free to use the ideas that resonate and can be accomplished by your team, within your budget and time frame.

1



Audience Definition

An effective public engagement process starts by having a clear idea of who you want to reach. Resources naturally dictate that we can't engage 100% of the population. A targeted approach will ensure that interested and impacted stakeholders are at the table throughout the process.

Why is audience definition important?

- Some engagement techniques work better for specific audiences. If you don't identify and gain clarity on your core audiences, you can run afoul when developing your engagement process, strategies, and tools. Audience definition is a prerequisite to process design.
- Determining your audience dictates how much education will be needed prior to obtaining input. Having a clear understanding of the time needed for education will help you stay on track.
- Identifying critical audiences early in the process reduces time and risk and the potential for re-work.

When determining the core audience for a process, there are several questions to consider.

- What groups need to be reached?
- What demographic targets are needed?
- Who must be involved for this effort to be deemed a success?

Ideas collected from our APA "Taming Tactics" session revealed a variety of goals and strategies to consider during your audience definition process.

Know Your Audience

1. **Define "the public"** – It's easy to assume that everyone has the same definition of the audience for public engagement. To be sure everyone is on the same page, it's best to be explicit early on so that everyone – from elected officials to engagement staff and the community itself – knows who is included. This may mean spelling out that it's not limited to people of voting age, locals, nor property owners.
2. **Recognize the diversity of perspectives** – For controversial projects, you often know ahead of time about opposing groups or individuals. It's important to take the time to understand both sides. Meet with these groups in advance of broader engagement to discuss the facts as known at the time. Have a true dialogue that includes an open mind and active listening to hear their specific interests. Often, you will find that there are similar interests, which can lead you toward consensus points later in the process. For controversial topics, getting information and specific facts out early can be beneficial, which can be done through a frequently asked questions sheet, social media campaign, or face-to-face meetings.
3. **Know who influences decision makers** – It's important to know who influences the people making the final decisions on a plan or process. Every community is different, but common influencers include large employers, social organization leaders, public sector agencies, large land owners, and business leaders. Conduct research to determine what issues are relevant to them, anticipate how the project or program might impact or benefit them, and provide a role for these influencers in the process.

Basic Inclusivity

4. **Understand the demographics** – This basic component is foundational to public engagement work. As part of the public engagement plan, use demographic analysis to better understand the make up of the community at stake and to provide context. This is important because there tends to be a strong correlation between context, values, and priorities. Go beyond age, race, and income to look at health indicators such as prevalence of chronic disease and opioid deaths and how average lifespan differs across the community. Look at households without a car, crime statistics and type, commuting patterns, and scan for concentrations of other social indicators that might impact the project or program. Document the findings and how key discoveries could impact the project.

5. **Track participation** – While this sounds like a simple step, it is often overlooked as time and resources become focused on education and gathering input. To measure your success towards engaging a variety of stakeholders, ask for basic demographic information on in-person and online surveys, take photos at meetings, use a map exercise at meetings to illustrate where people live, work, and play. Track the number and location of meetings. While it's often difficult to provide a one-to-one comparison, hosting meetings at a variety of times and places, and making it easy for people to attend will help to ensure that the process includes a wide variety of people and perspectives.

2



The Role of the Public

Developing clarity on the role that the public will play in the planning process is a critical first step in developing your community engagement plan. A mismatch of expectations on the role of the public can lead to frustration and conflict that can derail any planning process. Transparency and clarity upfront, on the other hand, can foster trust and build the community and stakeholder support that's needed to support your plan through to successful implementation.

There are a few central questions to address first internally that will also help maintain clarity with participants during the engagement process:

- What do you expect from the public?
- Where in the process is public influence most important?
- Are you clear about both?

Ideas collected from our APA working session revealed a variety of goals and strategies to consider when defining the role of the public.

Get Clarity Early On

6. **Clearly define the topic and purpose** – Clarity and transparency are such critical aspects of successful community engagement that they warrant very close attention at every step of the process, from the first internal conversations to the dissemination of the results. Too often mismatched expectations fuel conflict that, if allowed to fester, can derail a project. The International Association for Public Participation has developed a [spectrum](#) to provide clarity on the role for public.

Specifically consider communicating clearly on:

- What is the need for the project?
- What could be the consequences of inaction?

- What are the roles and responsibilities of the public, planners, boards, councils, etc.?
 - Who are the decision makers?
 - Why is public input needed?
 - What information needs to be gathered?
 - How is the public input going to be used?
 - What's on the table and what are the constraints or limitations?
7. **Outline and communicate the rules of engagement** – Whether you are conducting online or face-to-face engagement, establish clear guidelines for conduct. These ground rules should be well thought out, carefully crafted, and communicated at the beginning of the process. The tone of these should emphasize listening to understand, mutual respect, and creating equal opportunity for input without fear of intimidation or ridicule. To avoid an “us and them” dynamic, it can be useful to invite participants to play a role in facilitation or reporting.

Plan for Deep Engagement

8. **Weave in the education needed for informed input** – Community engagement is not only about collecting input. Planning choices can be complicated, and for this reason, it's wise to weave in education into the engagement process. It's naïve to simply provide documentation, because it is seldom read by participants. With careful planning and tool selection, it's possible to embed the required learning into the engagement experience. Interactive engagement tools like budget allocation, scenario or image ratings, visual preference surveys, and map input exercises either online or in face-to-face session can be helpful in ensuring that the input that is gathered is informed, relevant, and trustworthy.
9. **Encourage deep listening** – Never forget that the primary role for public engagement is to listen deeply to the community. Well designed engagement programs will create a safe place for people to share feedback either briefly or in detail at their discretion. Some of the most fruitful and often cathartic engagement experiences, particularly for contentious projects, involve peer-to-peer exchanges in small, randomly assigned groups – giving people a safe way to learn about other perspectives. Involving participants in both leading and reporting back from group discussions can be a powerful way of creating deep engagement.

Get Cozy

10. **Review the results with the public** – It's important to remember that the public input (the data), in some sense, belongs to the participants. The role of planners is to be responsible stewards of that resource. A best practice is to verify what you heard by asking, "did we get that right?" and "what did we miss?" Be sure to reinforce the value of public participation at the end of the process by communicating how the plan was affected by public input.
11. **Draw in critics** – It's natural to want to avoid conflict, but in the case of community engagement, this stance can intensify animosity. Early, active, and frequent personalized engagement of opposed individuals and groups can be a powerful way to listen deeply to their concerns, share details about constraints and project options, and draw them into a collaborative role to find solutions.
12. **Empower participants** – People closest to the issues often have the best solutions. Seek to turn participants into project representatives. Empower the audience by providing them with key roles to play that will give them a sense of purpose. Examples include creating a stakeholder committee, asking stakeholders to help run a meeting, having a clear "ask" of the audience by assigning homework, or "deputizing" citizens to be planners for the day to develop their own solutions. Encourage citizens to become problem solvers.

3



Success Definition

Successful engagement requires documenting the thoughts of advocates, while also identifying public values and stakeholder priorities. Advocates are quick to participate and typically make themselves more accessible to the planning process. Gaining input from a broader cross-section of the community often proves more difficult, and a planning process with underrepresentation from the public can lead to unanticipated consequences or a narrowly supported outcome.

Successful plans share a common characteristic: the engagement goals are clearly defined. Without goals, how can planners know when engagement success has been achieved. While goals are not universal, planners should consider the following questions when developing their project-specific goals.

- **Time** – What is the project schedule? What can be accomplished in that timeframe?
- **Resources** – What human and financial resources are accessible to the planning process? How can you leverage partnerships and previous engagement efforts?
- **History** – How well have past plans used participant input?
- **Leadership** – Does community leadership value engagement results?

In a perfect world, these circumstances would be ideal for every planning process and every voice in the community would have the time, interest, and opportunity to effectively participate. But often in practice, participation is compromised by forces beyond a planner's influence. Planners should embrace imperfection and continually consider trade-offs – it's not unusual for a process to be successful despite a more flexible adherence to engagement goals. Simple metrics, such as increasing the number of touchpoints, the diversity of viewpoints, and the quality of data points, can elevate engagement results to a level equal to technical data.

Ideas collected during our “Taming Tactics” session revealed a variety of opinions on the appropriate aspirational goals for planning processes.

Involve Leadership

- 13. Get management buy-in** – Involving leadership in goal setting fosters awareness and shared responsibility. It also can give them new awareness about past performance and the value of improvement. Showing leaders what it takes to be successful might make them more inclined to offer additional resources to the engagement strategy.

Monitor Progress and Be Willing to Change Course

- 14. Measure your success** – The phrase “you only achieve what you measure” should be at the forefront of the planner’s mind during goal setting. It’s easy to become distracted during a complicated, multifaceted planning process, but it’s important not to forget this vital step.
- 15. Be nimble on the journey** – If identifying goals and monitoring progress are helpful, *a willingness to be responsive* shows commitment to them both. Staying the course is often easier but being nimble increases the likelihood that goals are achieved. A status check after the first round of engagement is critical. If the chosen methods are not leading to the desired results, it’s important to change course.

Celebrate Success

- 16. Rejoice in shared achievements** – As a plan nears completion, the public, project committee, elected officials, and the project team tend to be exhausted. However, the final stage is the perfect time to reflect on successes and milestones. It’s rare to exceed all goals, and planners should allow themselves the right to define success incrementally. Maybe it’s simply achieving more than the last plan. Maybe it’s reaching most goals, but not all. Maybe it’s achieving everything the process was supposed to accomplish. Regardless, the outcomes are worth sharing and celebrating. After all, planning done right is a shared process and a shared result. Planners should memorialize the participation, make a video, send a thank you letter to committee members, brag about the community to the media, take an elected official to a conference, and spend time reflecting with their team. This affirmation will inspire everyone to seek the same success, and more, when the next plan comes along.

4



Process Design

If “defining success” is identifying, vetting, and communicating engagement goals, then “process design” is how planners determine the best way to use available resources by answering the following questions.

- What information needs to be gathered from participants?
- At what point in the process are engagement results needed to inform decisions?
- What resources are available for engagement?
- How can these resources be used most effectively to achieve the project goals?

Planners at the APA “Taming Tactics” session identified several key factors that should be considered during process design.

17. **Begin drafting the process design early on** – Design the process early and allow it to inform a more detailed work plan and scope of services.
18. **Welcome stakeholders** – Consider forming a public engagement committee to ensure diverse perspectives, the best use of community resources, and full exposure to existing communication channels.
19. **Acknowledge that there are different strokes for different folks** – Recognize that multiple engagement channels (e.g., one-on-one, small group, large format, virtual) will be necessary and should be influenced by the public engagement goals.

While every plan should be tailored to specific circumstances, the rational planning process should still be the framework to assemble a solid engagement process. The rational planning process is described next in five ordered steps. Tips are included in each step to guide the process to success.

Step 1: Identify Community Values and Priorities

20. **Mine the past** – During the initial engagement process, planners should mine past engagement efforts for recurring themes and investigate relevant plans to inspire participants. Previous efforts are likely to have a great deal of valuable information and by building on them, planners can avoid asking the same questions again and begin the process armed with insight into the priorities of the community.
21. **Take the temperature** – Testing how applicable the public and various committees find previous efforts is critical to visioning. Planners can avoid past mistakes or missteps and design engagement to address any shortcomings.

Step 2: Define the Problem or Opportunity

22. **Be as specific as possible** – A vaguely defined process will likely result in ineffective participation and diluted outcomes. By transparently and specifically outlining key issues, options, and any constraints or limitations that may be in place, planners will establish clarity early on and avoid frustration about mismatched community expectations.
23. **Realize that public engagement is about the community** – When defining the problem or identifying the opportunity, planners should focus on what community wants the plan to achieve.

Step 3: Create and Evaluate Alternatives

24. **Create compelling content to generate compelling results** – Evaluating alternatives should be a technical exercise that includes scenario planning, a public exercise, and/or a hands-on design charrette. Compelling materials describing or depicting alternatives will generate more trustworthy results during the community engagement process. It's worth the effort to create visual and easy to understand graphics to quickly convey concepts. These can be leveraged in online engagement and in workshop materials.
25. **Encourage citizens to take charge of the evaluation criteria** – It's important for participants to help identify evaluation criteria so that the overall planning process generates data to inform decision makers. The evaluation criteria should be linked to community priorities established during project-specific engagement activities.

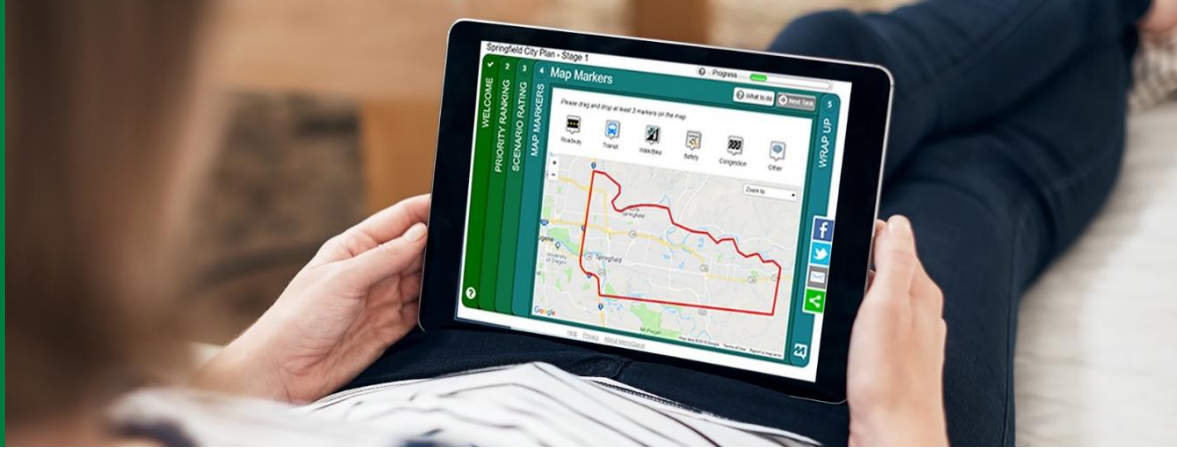
Step 4: Refine the Preferred Alternatives

26. **Be prepared to blend** – Often more than one alternative is preferred by the community. A blending of two alternatives may be desirable to draw in the best aspects of each. If blending isn't possible, mitigation strategies to address the shortcomings may be needed to demonstrate that the community input yielded valuable effects on the outcome.
27. **Expect imperfection** – The preferred alternative is almost always less than perfect. Allowing the public and decision makers to review the preferred alternative and align it with stated goals gives them a chance to learn why this particular alternative was chosen. This can increase consensus prior to adoption.

Step 5: Endorse and Promote the Plan

28. **Champion public input** – The best way to cultivate a positive climate of community engagement is to highlight how the plan was shaped by public input. Consider pulling these elements out of the report and creating infographics describing what was heard and how it affected the outcome.
29. **Arm decision makers with detailed information** – It can be a mistake to conflate all the results into one aggregated set of outcomes as this can undermine the differences between groups. By collecting and reporting back on the diversity of input that was received and documenting how different segments of the community felt about priorities can be valuable in the plan promotion stage. For example, when elected officials are speaking to the business community it can be powerful to highlight what was heard from them and how the outcome addresses their priorities.
30. **Reward participation** – By specifically highlighting participants who contributed to the plan, you can reinforce their support and give them a chance to share in the outcomes with pride.

5



Engagement Tools

Planners and community engagement teams have a wide range of tools to choose from to engage the public. From an assortment of face-to-face techniques to numerous online options, it's easy to be overwhelmed, lured by the shiny new thing, or stuck doing what's always been done.

To navigate through the tool selection process, it's best to be guided by a solid understanding of your goals, audience, and of course, your resource and time constraints. Just as successful businesses understand their "customer acquisition cost," planners should consider the "participant acquisition cost" and make the most of allocated resources.

During the engagement tool selection process there are some important guiding questions to address.

- **Tool selection** – Which tools will you need to reach the project goals? What functionality and interactivity is needed for actionable output?
- **Design and configuration** – How can the selected tools be configured for optimum engagement results?
- **Content creation** – Each tool will require language and imagery. What style and tone are most effective? What resources are available to produce compelling content?
- **Application** – Who will run the tools? What support network is available? How will the results be monitored to provide ongoing feedback to adjust for optimum audience reach?
- **Reporting** – How will you analyze the results? How will the results from multiple tools (e.g. public meetings, online surveys, and dialog sessions) be combined? How will the results be summarized for decision makers?

What follows are important considerations generated by the planners at the APA "Taming Tactics" session to guide project teams in the process of applying engagement tools to their projects.

Begin Early with an Open Mind

31. **Don't back yourself into techniques** – There's a tendency for planners to want to try something new or gravitate to the most enjoyable methods. While this can be appropriate, commit to selecting the most effective techniques for achieving participation goals and collecting the necessary information to support the agreed upon planning process.
32. **Leverage partner tools** – Prior to locking your process down and making final decisions on engagement tools, identify and meet with community and agency partners. These partner agencies will have their own engagement tools, resources, and opportunities that can be leveraged to fulfil project needs. Include neighborhood and community services organizations, non-profits, health and other departments, schools, parks, and other government agencies throughout the jurisdiction. University interns from a variety of departments can be great assistance in the process. These partners can become project champions and stewards that can add value throughout the process.
33. **Start engagement early** – It's a common mistake to wait until well into the project to begin the public engagement process. It's understandable that planners want to feel prepared and use the public's time wisely on tangible questions. These are good instincts, but it's equally important to have the first contact with the public on a project early enough in the process to be open to any ideas, input, or issues that the public care to offer before concrete options have been formed. Use engagement tools that solicit input on issues and priorities early on. Be confident that it's ok to ask the public for input about what's important to them without concrete options on the table. Try tools like priority ranking exercises or issue identification maps to encourage input on what's important way before talking about options. Online surveys can be a valuable way to efficiently gather this information.

Leverage Multiple Tools to Broaden Engagement

34. **Reduce barriers for public meetings** – Despite their decreasing attendance numbers, public meetings are still a required element for many agencies. Most people are busy and occupied with other things, so anything that you can do to make it easier for them to participate will increase your chances to engaging a large audience. For public meetings, try holding events at varying times including weeknights and weekends and avoid holidays and vacation season if possible. Do

what you can to provide materials and information in multiple languages. Try providing food and refreshments. Consider open house style meetings that allow people to drop in and participate for a short time. Create fast and fun interactive exercises to encourage interaction such as dot voting, community mapping, and world café discussions (where citizens explore various topics in breakout groups).

35. **Offer many options to participate** – With so many options available for participation, you will be well served to offer as many choices as possible to allow people to choose the method that is most convenient for them. Consider open house sessions, traditional public meetings, pop-up engagement opportunities, “office hours” drop in times, online surveys, mail in options, telephone voice mail for comments, and SMS text commenting among your engagement tools. Not every option is needed for every project, so tailor your tools for your audience and budget.
36. **Leverage online tools to broaden engagement** – The most cost-effective way to reduce the barriers to participation is to offer a fast method for participation online. While bland multiple-choice surveys tend to get low participation, more colorful and interactive online options that are specifically designed for planning projects can broaden your engagement dramatically, thereby lowering participant acquisition cost. By making use of online tools like interactive mapping, visual preference surveys, or budget allocation exercises, your online experience can be both fun and educational. Incorporating online alternatives for participation will allow less motivated or busier residents to be heard. This will often uncover more moderate views and increase the diversity of opinions being expressed, thus reducing the likelihood of the results being dominated by loud or persistent minority opinions.

Configure Tools to Inform and Engage

37. **Use tangible examples** – In planning projects, it’s tempting to keep the dialog at a high level since many plans result in abstract policy directions. Moreover, many people will imagine the worst until they see an attractive depiction of a successful outcome. The more that you can design your tools to include tangible examples, the more engaged your community will be in the process. There are several tools to choose from including tactical urbanism to demonstrate successful options on the ground, visual simulations or scenarios to help people envision the future, and visual preference surveys including graphics or photographs.

38. **Encourage dialog** – Each stakeholder brings a unique perspective and it's the role of public engagement to gather input from all perspectives to inform the plan. It's also critical for participants to learn from each other so that their input not only reflects their own opinions, but also an appreciation of the perspectives of others. Engagement tools that foster dialog encourage people to listen to and learn from each other. Town hall style sessions, social media pages, and small group discussions are great ways to foster dialog. Be careful not to filter ideas, but make sure that these forums are remain safe places to share ideas without fear of persecution. As facilitators of this process, rather than responding immediately, ask further questions to probe for a deeper understanding.

39. **Educate while engaging** – Efforts to keep the engagement experience short often mean that opportunities for education are limited. The result can be public input that is naïve or uninformed. There are many engagement tools to choose from that combine education with engagement. When executed well, these interactive exercises can be both popular and fast resulting in high participation rates and high quality public input. Both for online and face-to-face engagement tools, consider interactive games or exercises such as budget allocation (dividing \$100 between priority areas) or visual preference voting to make choices and trade-offs more easily understood. Other forums such as social media pages, op-ed editorial series, and site visits can also be powerful ways to foster learning about constraints and opportunities for your project.

Create a Safe Listening Environment

40. **Avoid grandstanding opportunities** – Many community engagement tools, like public meetings, present an easy environment for minority voices to grandstand and dominate the process. The result can be intimidating for participants and can bias the results. Limit the use of open microphones and instead organize the audience into smaller discussion groups designed to foster dialog. Consider polling on wireless keypads or mobile phones, or other anonymous voting techniques at meetings to ensure that everyone has an opportunity to participate. When using online engagement tools, avoid open forums where trolls can dominate and intimidate participants. These forums also fail to generate quantifiable data to inform plans. Online survey tools that present the same information to each participant allow the responses to be tabulated and used directly in planning documents.

41. **Listen deeply** – The tone of public engagement is critically important, especially in situations where controversial projects are being discussed. It's critical that agencies project a receptive tone focussed on learning about community preferences and opinions. Find tools that allow people to tell their stories and record their opinions. Make sure that people know that they are the experts of their community and you are there to learn from them. Listen, probe for more, and confirm what you've heard.
42. **Manage conflict proactively** – As facilitators of a public engagement process, it's important to cultivate an environment where all stakeholders and opinions can be heard. This means designing your engagement tools to be open to input, while requiring decorum to manage conflict. In all tools, ask for civility and set fair ground rules for conduct upfront. As soon as conflict appears, acknowledge concerns and clarify your understanding. Allow for enough time to listen. Offering a face-to-face follow-up meeting to opponents can be an effective way to stick to your agenda, while respecting people's need for deeper dialog.
43. **Highlight commonalities** – In most planning situations, there will be more common ground among stakeholders than differences of opinion, especially when it comes to priorities for the community. Find ways to highlight commonalities whenever possible in your engagement tools. These can be important touchstones to diffuse conflict whenever it arises.
44. **Be nimble, monitor, and reinvent** – No amount of planning will be enough to anticipate all circumstances that will arise in your public engagement process. In order to remain responsive and effective in the management of the process, it's important to recognize that adjustments and reinvention of the process may be needed as the situation evolves. If you make mistakes, learn from them. The public engagement process is somewhat messy by nature. Embrace imperfection.

6



Ensuring Diversity

Every public planning project affects a diverse range of stakeholders – it's critical to the credibility of the results that various significant stakeholder groups are well represented. Their voice is necessary to ensure a balanced and fair outcome that is broadly supported.

Why is ensuring diversity important?

- Each demographic segment may offer different perspectives on planning issues.
- A minimum critical mass is necessary to make reliable conclusions by segment.
- Engagement results may be scrutinized or rejected for missing audience groups.
- Elected officials and planning leaders will appreciate the insights into the priorities of different demographics when communicating the plan externally.
- During plan implementation the insights into stakeholder priorities and concerns will serve as valuable guides to maintaining community support.

When designing a process to ensure diversity, it's important to ask the following questions.

- What are your audience goals?
- How will you engage underrepresented groups?
- How will you monitor and adjust your outreach?

What follows are important considerations and ideas to guide project teams in the process of ensuring diversity in their outreach efforts.

Custom-Fit Your Engagement to Your Audience

45. **Create a demographic profile** – Each community is unique, and each project affects a different set of stakeholders. Create a demographic profile of your community and adapt it to each project to ensure that your plan includes an outreach strategy to reach each demographic segment that is critical to your success.

46. **Be as multi-cultural as your community** – Often, the most difficult to reach stakeholders are minority or recent immigrants. You may need to allocate a significant portion of your engagement budget and effort to ensure that they are well represented. These strategies may include translating engagement materials into multiple languages and providing trusted interpreters for community events. It's important to note that simply providing materials in other languages is seldom enough. By working with cultural community groups, you can extend your reach substantially as their leaders have connections and trust with their members.
47. **Treat youth as a special segment** – Engaging youth in planning for the future seems obvious but remains a challenge for many agencies. They are missed by the vast majority of promotional channels. Moreover, even if they do find out about the project, they often feel disengaged and fail to see the relevance to their lives. Plan specific activities for youth such as events at drop-in centers, recreational complexes, or even skate parks. Leverage student interns to both gain a better understanding of youth perspectives as well as harnessing their energy to coordinate engagement activities with their peers.

Remove Obstacles to Participation

48. **Accommodate special needs to broaden access** – It's critical to think about the special needs of your audience and to be clear in promotional materials that accommodations are in place. These will include provisions for participants with hearing, vision, or mobility challenges. Visual preference surveys can still be used, for example, but alternatives must also be made available. With public meetings, it's wise to select venues and locations that offer ample access to public transportation, safe biking, and proximity to those with the greatest mobility challenges.
49. **Provide childcare at public meetings** – For many families, the biggest obstacle to attending public meetings is childcare. Make it easy for people with young children to attend events by creating kid-friendly activities, providing healthy snacks and games, and offering staffed zones to occupy little ones while parents participate.
50. **Make your events enticing** – Attending a face-to-face event is a lot to ask with people's busy schedules. There are many cost-effective things you can do to reward people for their effort. This could include providing some light snacks, refunding transit costs, and other small gestures. These will be greatly appreciated and demonstrate your agency's commitment to engagement.

51. **Include an online option** – The majority of people are unable or unwilling to attend public meetings. For this large segment of the population, it's important to demonstrate your commitment to diverse engagement by providing an online option, such as a visually compelling survey to allow people to provide input from their smartphone, tablet, computer, or even a kiosk at a community center. Aim for a 5-minute experience for the highest participation levels and broadest reach.

Continually and Strategically Broaden the Circle

52. **Leverage participants to broaden the circle** – Simply asking participants “who else needs to be involved in the conversation” can uncover community groups and organizations that can be approached to broaden the engagement. This is a powerful way to demonstrate that you are committed to diversity and inclusion. Enlist participants as ambassadors to help spread the word.
53. **Consider forming a steering committee** – A steering committee can be a powerful way to design for diversity as its members can be carefully selected to ensure broad representation. Once formed, steering committee members can then be enlisted to help broaden the circle by engaging with their own audiences.
54. **One-on-one is sometimes necessary** – In many situations, especially on contentious projects, one-on-one stakeholder interviews are most productive. Early in the process, invite specific stakeholder groups, leaders, or vocal individuals to a one-on-one discussion. This can be an effective way to develop a detailed understanding of their priorities and concerns, dissipate anger or animosity, and increase their level of trust in the process.
55. **Advertise engagement using a variety of channels** – A multi-pronged approach to promotions is critical to engaging a diverse audience as the most difficult to reach populations will have unique sources of trusted information. By identifying these audiences and leveraging their trusted sources you can get your message heard. Customizing the calls to action and messaging to target these audiences and their interests will help increase uptake significantly. Blend social with conventional media including mailings, a variety of media outlets, email lists, and posted signs.

Go to Them

56. **Harness pop-up engagement** – The most effective way to reach underrepresented populations is to go to them using pop-up engagement, which can be as simple as

a table with some iPads or interactive engagement activities. It needs to be portable enough to be moved from place to place as opportunities arise. Tools like the meeting-in-a-box are also effective ways of allowing people to self-organize, choose a location, and provide structured input at their own convenience.

57. **Go to their turf** – The most difficult to reach audiences will not be willing to travel far from their community. Take your engagement on the road to a location where people will feel comfortable. Try using non-traditional locations for events. Mix up the times of the day to allow a wide variety of people to participate (e.g. a senior’s center at lunch, a college between classes, a recreation center after an activity).
58. **Piggy back on events held by other groups** – Targeting community groups to access underrepresented audiences can successfully broaden engagement. By attending existing community events planned by other groups, you can effectively meet people on their own turf to develop trust and dialog. Hosting a table at community events will allow you to reach target audiences that may otherwise never participate in an event organized by your agency and at a fraction of the cost.
59. **Gather information when people are captive** – Offering fast engagement activities, like online surveys for people lined up at a coffee shop or folks waiting for the next band at a community music festival, can help them pass the time.

Design Engagement to Broaden Perspectives

60. **Look beyond demographics for diversity** - Diversity not only applied to audiences but also perspectives. A valuable role of community engagement is to broaden the views of participants to better understand the issues from different vantage points and ensure that the input that they provide is informed with a balanced view of the planning options and priorities of other community members.
61. **Randomize to cultivate empathy** – Audiences at face-to-face events will naturally tend to cluster with people they already know and trust. By designing your seating plans or break out sessions with randomly assigned seating you can increase people’s exposure to other points of view often leading to greater empathy, tolerance and less polarization. This kind of mixing of ideas and perspectives is best facilitated in small groups such as 6-8 people per table.

7



Leveraging Partners

Resources for community engagement are often limited, so taking advantage of local partners can help increase reach by using existing relationships, while driving down the cost of engagement.

We also know that participants are more likely to engage in a process when asked by someone that they know and respect. Identifying local networks and working with their leaders early in the process can lead to a more personal approach. In addition, local residents and business leaders can often pinpoint critical and difficult to reach groups.

When thinking about how to use local resources and partnerships to enhance your engagement process, it's important to answer two questions.

- Who are your community partners?
- What networks can be leveraged to make the most effective use of engagement resources?

What follows are important considerations and ideas to effectively leverage partners to enhance community engagement for your projects.

Partner, Partner, Partner

- 62. Give community partners autonomy** – A true partnership is a two-way street. Engaging with key community and agency partners early in the process with an open mind will send a positive message of collaboration. Asking them to provide input on when and how their members should be engaged while helping them understand the constraints of your process will help establish trust and transparency. Partnerships can particularly important to gain access to marginalized populations efficiently and effectively.

63. **Partners as subcontractors** – In some circumstances, especially with not-for-profit community groups with limited budgets, it may make sense to offer to pay for their engagement activities. Treating them as consultants or subcontractors can elevate the level of engagement and generate a lasting partnership that can benefit the agency for years to come.
64. **Establish a local project base** – For many projects, having a local point of contact helps ground the process. Participants feel “safe” to ask questions and share thoughts when the process seems less formal, creating an atmosphere more conducive to open dialogue.
65. **Use an engagement pyramid** – Use the power of local contacts to expand the engagement network for information exchange. Ask each person you interview to identify two additional people, ask state and local elected officials to identify key individuals and agencies, and meet with local business owners and large employers on their terms. Ask “who is missing” multiple times throughout the process to ensure a continuous balancing of interests.

Educate and Communicate

66. **Use subject matter experts to create a local knowledge base** – In order for local networks to be effective, they need to have a baseline knowledge of the issues. Developing strong local partners means providing clear, consistent information to stakeholders.
67. **Encourage partners to embrace controversial topics** – Educated residents and community organizations are the best first defense against mis-information. Provide key messages and let local partners disseminate this information with a unified voice. Encourage participants to stand up to vocal minorities by delivering the relevant facts about controversial issues. Distill concerns, categorize them, and provide information on how the project will address concerns.

8



External Communication

In today's environment of instant communication and broad social networks, a well-designed external communication plan is essential.

One of the first steps is to publicly define the problem, or problems, that the project is trying to address to illustrate that the process is relevant. Beyond purpose, a solid communications plan can demonstrate transparency by outlining how the engagement will occur, key milestones, and how community input will impact final decisions.

The communications plan will build off the engagement process design and how you have defined project success. Once these foundational elements are in place, the communication plan determines what, when, and how this information is communicated.

When determining your communication strategy for the project, there are several questions to consider.

- How should you set the stage for your work by outlining community challenges?
- How will you communicate the project goals, process, and progress?
- How will you use traditional media, social media, newsletters, email, websites, blogs, etc.?
- What languages are required for the materials to reach your target audiences?

What follows are important considerations and ideas to guide project teams in the process of developing an external communications plan to support planning projects.

Develop Clear and Consistent Communication

68. **Communicate early and often** – Establish communication vehicles at the beginning of the project – like a dedicated website, social media, and email newsletter – and consistently provide information through those channels. Don't wait until a controversy occurs to create clear lines of communication with interested and impacted parties.
69. **Communicate with clarity** – It's important to communicate planning issues from the perspective of the public. To ensure that messages are simple, easily understood, and jargon free, ask community advocates to review and refine presentations. Social media, community newsletters, and topical neighborhood meetings can provide communication platforms for constant contact.

Tailor Communications to the Audience

70. **Be authentic and candid** – In the effort to be professional, it's easy for agencies to sound like robots. Don't be afraid to use plain language, free of jargon. Be relatable. Remember that agency staff and consultant are residents as well. Tell stories and share experiences of your own. Use stories shared by participants in latter stages to show a human face on the process. Don't be afraid to tell the hard truth. Talk about limitations and constraints early and frequently. This candor will help to manage expectations and will steer the dialog to what's possible. Transparency promotes mutual respect and collaboration.
71. **Design multi-channel promotions for the audience** – Promoting participation is one of the most important and undervalued skills of community engagement professionals. Be strategic about which channels are needed to attract the broadest representation possible to inform your plan. Your demographic profile will inform your promotional efforts. Expect to adjust these along the way as you monitor engagement. Each audience will respond to different priorities and calls to action. Tailor them for the audience that you need to attract. Consider a wide variety of outlets including free public service announcements on local radio, social media pages and newsletters of community groups, traditional media, mailings or door hangers, and targeted advertisements on social networks. One of the most effective channels for promoting engagement is email campaigns – try to find existing email lists like the parks and recreation database to invite the broader community to participate.

Demonstrate Transparency

72. **Communicate without filtering** – Provide open communications to those in attendance and those not in attendance. Include all project feedback, not just the good stuff. Use periodic surveying to show all opinions and publish findings and key process points to illustrate that the people have spoken.
73. **Establish relationships with local media** – To many times, good planning processes and results are not reported when things go well. Set the local reporters up for success by providing fact sheets, process maps, providing names for interviews, and inviting them to community events.

Stand Out with Style

74. **Develop a social media plan** – Take the time to develop a structure for who, what, and when messages are conveyed through social media channels. Know your community and the platforms that will create the most impact. For longer-term projects, consider distinct social media pages and hashtags to track communications throughout the project. Always monitor social media and have a social media policy in place to assist when controversial issues arise.
75. **Use a project specific brand and logo** – Projects can gain attention and a level of importance by adapting the principles of traditional brand management. Project logos and brands elevate the project above the routine planning and can help to gain public and media attention.



9



Facilitation Techniques

It's no surprise that planners get excited about rolling up their sleeves and getting to work. The most comments collected during the APA "Taming Tactics" session involved facilitation techniques. The careful design and management of the interface between the project team and the community can dramatically affect the project outcome.

Below are the questions to address when considering facilitation techniques.

- What methods are going to be most effective?
- How many different techniques do we need?
- How can we ensure there is parity across activities?
- How much time and money do we have?

What follows are important considerations and ideas to guide project teams in the process of selecting methods and facilitating the public process.

Begin with the End in Mind

76. **Have a strategy for synthesizing results** – One challenge at the end of an engagement campaign is finding a place for all the input collected. The various methods used to engage different cohort groups complicates how results can be represented. For example, a digital survey might have been used to engage the public online and a "meeting in a box" to involve stakeholders in person. The engagement strategy should bring parity between engagement methods. A planner might use similar questions or organize results into logical planning themes and categories. The bottom line is: planners must be prepared with a strategy for merging results. That jumble of public comments is data that will inform the planning process!

77. **Document the process** – Consider carefully how you can visually highlight the nature of the engagement. Photos and video captured during events will become useful in conveying the dialog that took place and add credibility to the results.

Set the Stage Carefully

78. **Begin with clarity** – By clearly defining the purpose, expectations, and ground rules at the beginning of the meeting, participants can quickly learn about what's on the table and how their input will be used in the process. By laying out clear and fair ground rules and requiring agreement on them before proceeding, a social contract is created.
79. **Create and maintain a safe place for all** – Make efforts to create an inclusive, judgement-free zone to ensure that everyone has an equal opportunity to speak without fear of intimidation. Even support for ideas shared by participants (like clapping) can become as intimidating as booing because it reinforces an “us and them” mentality.
80. **Remind along the way** – There will likely be several times during any meeting where it will be important to redirect and remind people of the purpose of the engagement that was set out at the onset. This can be an important way to pivot if participants tend to change the questions being addressed.

Keep People Active

81. **Send plenty of staff** – Whether you use staff or partner group participants, be sure to have plenty of resource people available to keep folks engaged. Some participants may need someone to speak with them one-on-one while others prefer to be engaged in a group setting.
82. **Encourage input within categories** – Consider methods such as providing post-it notes for participants to add comments to a study area map or a list of priority areas to ensure that comments stay on topic and can be synthesized in context.
83. **Leverage visuals and learning materials** – By incorporating rich information into activities, participant will learn about planning issues, challenges, and limitation and they will be more likely to contribute constructive input.

Break into Small Groups

84. **Drop the mic** – While an open mic may be the way it's always been done, it can make your meeting vulnerable to grandstanding and may allow loud voices to dominate the process and intimidate other participants into silence. Design small group exercises to ensure that people can be heard.
85. **Randomize group members** – By randomizing the creation of smaller groups, individuals with strong opinions will be more likely exposed to differing opinions, thus increasing mutual learning. Peer exchanges that occur in small group discussions can foster empathy which can ease tensions.
86. **Take questions in smaller groups** – By taking questions in groups, many people can be heard. A group facilitator can then “report-back” on main questions and themes that emerged to be discussed in plenary. This level of moderation will allow both granular recording of questions as well as higher level responses. Follow-up with individuals can be arranged if more detailed responses are needed.
87. **Focus groups with key stakeholders** – In situations where there are loud and passionate stakeholder groups, it may be useful to offer a special focus group for their members. This will allow for a detailed discussion for their concerns to be heard and documented.

Practice Active Listening

88. **Ask clarifying questions** – A primary role of community engagement is to collect public opinions. To both demonstrate that you are dedicated to that mission and to ensure that you have understood their input, ask for clarification and probe for more information.
89. **Confirm what you have heard** – It's a best practice to summarize what you've heard from the community during and again at the end of a meeting. Ask if you got it right and if there's anything you missed.

90. **Avoid making conclusions too soon** – Since there will be many methods for collecting opinions, it can be premature to summarize too much at any one session. Identify trends only after results have been synthesized and a sufficient participation volume has been achieved. That dissenting voice could be end up being the majority opinion.
91. **Listen more than you speak** – It can be tempting to respond to every comment or opinion, but this may come across as being defensive. This is especially true for incorrect or misleading information. Often the best response is a simple, “thank you for your comment.”
92. **Call out areas of agreement** – It can be helpful to focus attention on shared priorities specially when tensions increase. This demonstrates that opposing sides may be closer than they seem and make the remaining differences seem surmountable.
93. **Capture comments accurately** – It’s best to capture comments as close to verbatim as possible. When possible, allow people to write them, type them, text them, and deposit them directly to project staff. This creates a feeling of being heard and can be cathartic for passionate participants.

Call in the Experts

94. **Know when a trained neutral facilitator is needed** – Conflict resolution can be extremely challenging to navigate successfully. If you anticipate challenging meetings with the community, it may be time to bring in a skilled facilitator to both design and manage the dialog. Just like it’s difficult for a defendant to defend themselves in court, it can be difficult for an agency or consultants working for the agency to facilitate community dialog for contentious projects. A neutral facilitator may be needed to establish trust and foster productive dialog.

Be Welcoming

95. **Set the table** – Demonstrate that you value participation by creating a comfortable and welcoming setting. A few refreshments, music, or other welcoming gestures can create a positive atmosphere.

96. **Bring the opposition on the team** – If you have opposing groups, it's important to make sure they feel welcome. Since their support for the outcome can be so critical to the successful implementation of the plan, sometimes it's best to treat them as partners and offer them a role in the process. This can seem risky, but often the result is mutual learning, increased trust, and reduced tensions.
97. **Cultivate stewards of your process** – It's often useful to ask for "help" of participants to keep things on track. Many will respond to a sincere request for "help" and once the participants are governing each other, the meeting will be far easier to manage.

Stay Cool

98. **Be sincere and understanding** – It's so easy for staff members to come across as cold when trying to be professional. It's important to recognize and honor the emotion that people are expressing and show compassion. Once strong emotions are expressed and acknowledged, often a more measured dialog can take place. If ignored, it may return again and again.
99. **Humor is great, sometimes** – Creating a light-hearted environment through humor can be effective in deescalating conflicts. It's also easy to come across as being glib in light of people's frustrations or concerns. Use humor cautiously. When serious emotion is being expressed, put the jokes aside.
100. **Be patient and non-judgemental** – Don't get swept up in what may seem to be personal attacks. Respond to clarify what's at the heart of the input and remain calm while avoiding judgement. Find a way to empathize without becoming negative.

**We hope you enjoyed these 100 great community engagement ideas!
Want more? Join us now or anytime with this on-demand webinar:**



Thanks to our Contributors

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