



PUBLIC ENGAGEMENT

Toolkit



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Public Engagement Toolkit

WHY IS AN ENGAGEMENT TOOLKIT IMPORTANT

An engagement toolkit establishes a consistent approach to our public engagement efforts. It helps ensure that our staff and consultants are coordinated and proactive in their engagement approach, providing a more seamless and predictable experience for our residents.

This toolkit is inspired and informed by best practices and lessons learned across the public sector. The toolkit includes templates and tools that will help us build organizational capacity for more effective public engagement and two-way conversation with our community.

It's important to remember that proper public engagement takes time and dedication. This toolkit is to help guide you through your engagement planning process, and the steps that are mandatory are also noted. Before conducting or developing any public engagement process, please review and become familiar with the CRD Public Engagement Policy and Framework.

[CRD PUBLIC ENGAGEMENT POLICY](#)

[PUBLIC ENGAGEMENT FRAMEWORK](#)

Planning for Success: How We Engage

A successful public engagement process involves six key steps:

This toolkit has a variety of resources and materials for each step.

Plan

1. Determining Scope
2. Roles and Responsibilities
3. Identification of Interested and Affected People

Design

4. Engagement Techniques & Tools
5. Removing Barriers
6. Key Messaging
7. Privacy Considerations
8. Budgeting for Effective Public Engagement
9. Engagement Plan Template

Evaluate

21. Feedback and Evaluation Forms

Promote

10. Social Media
11. Media and Emails
12. Creating Your Project Web Page
13. Writing Style Guide

Connect

14. First Nations Territorial Acknowledgment
15. In-person Event Checklist
16. Online Event Checklist
17. Facilitation Tips and Checklist
18. Survey Design







Close the Loop

19. Reporting on Public Engagement Efforts
20. What We Heard Engagement Summary Report



APPROVED POLICIES

- Corporate Communications Policy
- Public Engagement Policy

STEP	ACTIVITIES	APPROXIMATE TIME NEEDED
 Plan	<ul style="list-style-type: none"> • Assess the need for engagement or determine the level of community impact • Determine engagement objectives • Identify Interested and affected people and groups • Consult with First Nations Relations and Privacy Office for advice and direction on any parallel First Nations engagement process • Determine staff involvement and approvals required 	<p>5-10% of overall project schedule</p> <p>Very early on, before project begins</p>
 Design	<ul style="list-style-type: none"> • Determine the strategy • Choose techniques and tools for promotion and engagement • Develop key messages • Create an engagement plan for approval * • Complete Privacy Impact Assessment * 	<p>25% of overall project schedule</p>
 Promote	<ul style="list-style-type: none"> • Tell your story • Invite participation 	<p>20% of overall project schedule</p> <p>Provide minimum two weeks' notice for events</p>
 Connect	<ul style="list-style-type: none"> • Implement engagement methods • Gather input • Facilitate and manage events 	<p>25% of overall project schedule</p>
 Close the loop	<ul style="list-style-type: none"> • Create a What We Heard Engagement Summary * • Report to decision-makers what we heard; determine whether additional engagement is required. • Report to participants what we heard and next steps in the project. 	<p>10-15% of overall project schedule</p> <p>Aim to close the loop within 30 days of concluding engagement phase or process.</p>
 Evaluate	<ul style="list-style-type: none"> • Evaluate the engagement process to determine what worked well, what didn't and what changes or if further engagement might be needed. • Reflect on lessons learned that can inform future engagement. 	<p>10% of overall project schedule</p> <p>Complete soon after engagement is complete while fresh in your mind.</p>

*Required deliverable as part of the process

Plan

1. Determining Scope

These questions are prompts to guide discussions, or to prepare an initial engagement scope. They will then inform the engagement plan template.

- What is the decision to be made?
 - Which departments need to be aware/involved in the process?
 - What elements of the decision can be informed by public input? What cannot be influenced? Refer to the decision tree in the Framework.
 - What does “success” or meaningful public engagement look like?
 - How will we know if we have been successful?
 - Who is affected by the decision being made?
 - What is the potential impact or interest each interested group will have in the decision?
 - What information will those affected or interested need to participate?
 - What is our historical relationship with interested people and groups? What has our previous experience been?
 - How do they receive information?
 - How do they like to provide input?
 - What risks are involved? How can we mitigate those risks?
 - What opportunities exist? How can we best take advantage of the opportunities?
- How much time is needed to facilitate public engagement? (e.g. notification, invitation, events, data analysis, reporting)
 - Have we allocated budget for public engagement efforts? (e.g. advertising, venue rental, catering, print and display materials, overtime, consulting fees)
 - What other issues or topics could come up in this conversation?
 - Are there opportunities to integrate other questions or issues in the same engagement process?
 - Is a separate First Nations engagement process required, and if so what is the sequencing? Talk to First Nations Relations.

The 2024 Resident Survey found that only 12% of residents feel well-informed about CRD’s decision-making process, while 49% report being slightly or not at all informed. Make sure you plan to explain the process as well as the decision to be made.

When planning for participation, consider ways to make participation more equitable:

- What engagement tools and approaches would make participation more equitable and resonate with interested people and groups?
- What barriers may prevent participation from under-represented voices and how might those barriers be overcome?
- How are you including the voices and perspectives of diverse people as part of the process? What groups of people are impacted by this initiative? Why would they benefit from knowing about the initiative or process?
- Whose voices or perspectives have you not heard from, and why? What are potential barriers to participation and how will you identify and address them?
- How will this program, service or initiative differently affect individuals and communities, in relation to different aspects of their identities?
- Consider: race, ethnicity, colour, ancestry, place of origin, political belief, religion, marital status, family status, physical disability, mental disability, sex, gender identity or expression, sexual orientation, age, class, socioeconomic status, and any other relevant aspects of identity.

When thinking about when best to engage, there are certain things to consider:

- Look for existing opportunities to engage your audience (e.g. regular meetings)
- Think about times/events where there are many people in one place (e.g. festivals)
- Prioritize your audience's convenience over your own
- Seek out a representative amongst your selected public and ask them for advice

- Avoid busy times and vacation seasons, long weekends, religious holidays, and spring break
- Provide plenty of notice to potential participants, at minimum two weeks
- Pay attention to what other regional district, community events and engagement activities are occurring
- What religious, cultural or dates of significance are happening for the community or groups you are engaging with?

2. Roles and Responsibilities

Project leads play a critical role when it comes to ensuring the public's voices are heard, valued, and considered in CRD decisions. This includes identifying early on what type of support you will need as well as viewing public engagement as an integrated part of your overall project rather than a separate component. Reach out to the Corporate Communications & Engagement team early on to share project information and assess resources needed internally and externally. Refer to the roles and responsibilities chart to help inform your project charter.

ROLES & RESPONSIBILITIES CHART

3. Identification of Interested and Affected People

There are a variety of people or organizations that might be affected or interested in the decision or project at hand.

It is important to remember that any issue or decision affects different people in different ways. Anticipating the various people that might be interested or affected helps inform project planning, including information needs and determines which engagement techniques might be considered.

Connect with the First Nations Relations division to confirm the resources and approach you need to have in place beyond the public engagement process. Get advice well before launching a public engagement process to ensure consistency with the CRD Statement of Reconciliation, relevant legislation and government-to-government agreements in place with First Nations.

When identifying who we need to hear from, there are several important questions to consider:

- Who is directly impacted by the decision?
- Who may be indirectly impacted?
- Who might be impacted but we don't typically hear from?
- Who has the influence to enable or inhibit the decision?
- Who are important perspectives or networks to engage in the process?

Individuals: (Examples)

- Residents (various socioeconomic, cultural, geographic locations, gender, age, household compositions)
- Indigenous people — if identified, customized plan needs creating
- Cyclists
- Motorists
- New immigrants
- Parents of school-aged children
- Persons with physical, cognitive or sensory barriers
- Pet Owners
- Property owners
- Renters
- Seniors
- Visitors
- Youth

Business and Economic Groups (Examples)

- Business owners
- Employees and employee groups
- Industry groups
- Business associations
- Development associations
- Chamber of Commerce
- Colleges and Universities
- Large employers

Government Bodies (Examples)

- Ambulance
- BC Transit
- Coast Guard
- Emergency Management
- Federal Government
- Fire services
- First Nations — if identified, create a customized plan
- Health Agencies
- Neighbouring municipalities
- Police
- Provincial Government
- School Districts
- Social service providers

Community and Advocacy (Examples)

- 2SLGBTQI+ groups
- Arts groups
- Environmental groups
- Ethnic groups
- Heritage Groups
- Neighbourhood or Community Associations
- Special event organizers
- Sports and recreation groups
- Sports associations
- Support groups for people with disabilities
- Transportation groups (cycling, accessibility, walking, taxi association)

Underrepresented Voices

Historically there are voices within our community that have been underrepresented in public engagement and decision-making. We continue to listen and learn to the needs and preferences of individuals and groups to continually inform and adapt our engagement methods. We are committed to applying what we learn to our policies, training and the language we use.

We all have a role and responsibility for removing barriers from our public engagement methods to be inclusive and accessible to all. Underrepresented voices may include the following and others:

- Immigrants
- Refugees
- People on Low Income and Renters
- People with Disabilities
- Youth
- Indigenous People
- Racialized People
- 2SLGBTQI+

Words Matter

Inclusive language is free from prejudice, stereotypes and discrimination. Learn more about appropriate language that empowers and respects all participants from the **Government of BC**.

Diversity, Equity and Inclusion in Public Engagement

Key Terms

It's important to recognize that the meaning of terms can vary between contexts and communities, and words carry embedded assumptions and histories. Being transparent about how one defines and uses terms helps to build shared understanding and identify differences in perspectives. The following definitions can be used to create a common understanding of the meaning of the terms equity, diversity, inclusion and accessibility as part of public engagement initiatives.

Diversity refers to the variety of unique dimensions, qualities, characteristics that an individual possesses, and the mix that occurs in a community or a group of people. Diversity includes factors such as race, ethnicity, language, age, gender identity and expression, sexual orientation, culture, religion, belief system, marital and family status, socioeconomic status, physical and intellectual abilities, mental health, work status, life experiences and thinking style.

Inclusion means to involve people who reflect the demographic, attitudinal and experiential diversity of the communities that may be impacted by a decision. Inclusive public engagement nurtures a sense of welcome, belonging, recognition and safety for all people, where diverse perspectives and ways of life are valued and respected.

Accessibility exists when all members of the communities impacted by a decision can access and fully participate in the engagement space and processes. Accessibility is about removing barriers and increasing inclusion and independence for everyone, especially people with disabilities. Barriers can be caused by environments, attitudes, practices, policies, information, communication or technologies, and be affected by intersecting forms of discrimination.

Equity exists when resources and opportunities for participation are distributed in a manner that responds to historic and ongoing disadvantages faced by marginalized groups. Equitable public engagement provides mutually beneficial opportunities for people to contribute and is mindful of power and privilege within engagement processes, institutions and broader systems. Equity is about treating people according to their diverse needs in a way that enables all people to participate, perform and engage to the same extent. Whereas equality treats everyone as the same, equity treats people differently dependent on need, circumstance and consideration of historical and systemic barriers to power and access.

Marginalized is a term used to describe groups of people who face historic and/or ongoing barriers to participating in the civic sphere due to socioeconomic inequities, lack of political rights or recognition, or other forms of oppression, discrimination or persecution. Some marginalized groups that have historically been under-represented in democratic processes and leadership include Indigenous Peoples, people of colour, women, gender non-binary individuals, LGBTQ2S+ individuals, people with disabilities, youth, seniors, immigrants and refugees, people with drug or alcohol dependencies and people from lower socioeconomic backgrounds and levels of education. Other common terms to describe marginalized groups include priority, vulnerable, targeted, hard to reach, disadvantaged, under-served, disenfranchised, disempowered, underprivileged, at-risk or high-risk. Different groups or individuals may have varying associations and preferences between these terms.

TAILORING YOUR EFFORTS **Needs of Interested and Affected People and Groups**

It's important to anticipate the information interested and affected people and groups will need and determine how best to engage them in the process. There are several questions that will assist in understanding where they are starting from:

- What do they care most about?
- What are they most concerned about?
- Have they engaged in the past?
- What was the experience?
- What barriers may exist to their engagement?
- How do they receive information?
- How have they typically provided input or participated in the past?

The table on page 10 outlines an example of how you might anticipate the needs and corresponding engagement activities to ensure they are aware of opportunities; have the information they need to participate fully and that activities are designed to meet their needs. This can be a useful tool when developing an engagement plan and when reporting back on how specific interested people and groups were engaged.

Examples of how efforts can be tailored

Interested and Affected People or Group	Interests	Desired information	Engagement activities
General	All services provided Services not provided but thought to be All projects and initiatives	Background reports Recent data Board decisions Visuals of proposed options Tax impact/fee impact Key policies Engagement approach	Website Letter of invitation or awareness Article submitted to their newsletter/website Online survey and/or in-person event Presentation at an upcoming meeting Clear point of contact and more than one way to contact Social media Media
Neighbourhood/Community Association	Land-use Changes in neighbourhood Costs to taxpayers Neighbourhood involvement Timing of proposed changes Capital projects Nearby parks	Tax impact Neighbourhood benefits Design features/amenities	Direct invitation to President to participate In-person or online event Booth at a neighbourhood market Posters or signage in neighbourhood
Business Owners	Economic vitality Changes to business district Tax rates Timing of proposed changes Land-use Construction impacts	Rate schedules Approved policies	In-person visit from key staff to affected businesses Presentation to business association or Chamber of Commerce
Not-for-Profit Sports Associations	Sports facilities Rental rates Recreational program or policy changes	Accessibility Service fees/costs	Interactive pop-up event at sporting event Signage promoting web survey in sporting facilities

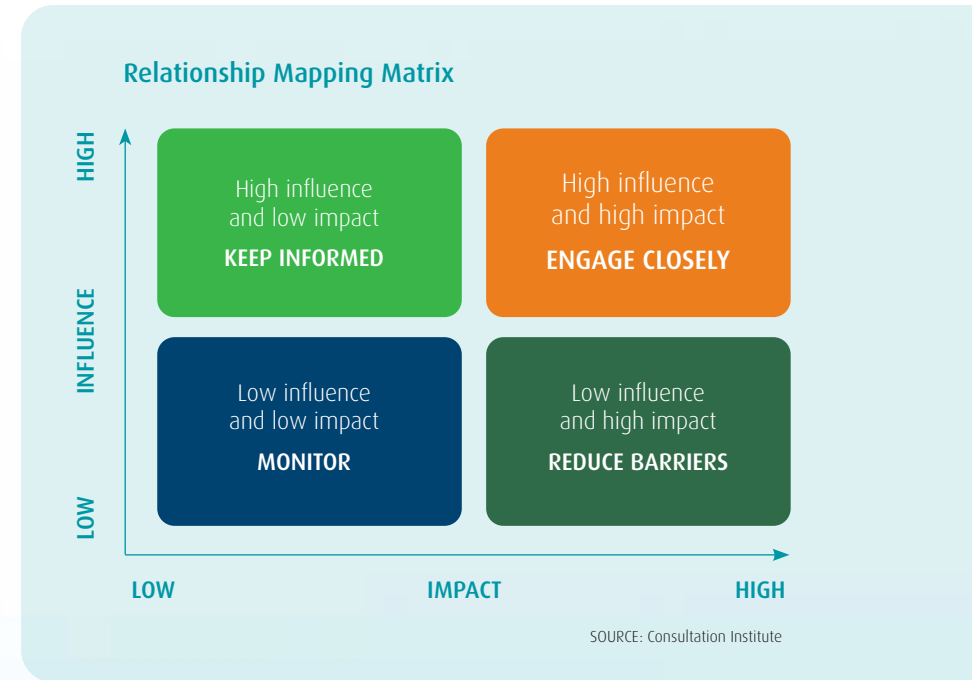
RELATIONSHIP MAPPING

Once you have identified potential interested people and groups, it is important to anticipate how people or organizations might be impacted or interested in a decision.

A mapping exercise involves gathering key project staff and contacts to help identify the impacts and influence of people and groups. The placement of interested and affected people and groups within the four quadrants will inform strategies tailored to each interest's needs.

1. Create the matrix noted on this page on a wall or a large table-top piece of paper.
2. Brainstorm all the groups who might be involved or interested in your decision or project. Write their names on sticky notes (one note per name).
3. Place the sticky notes on the matrix, considering both their level of influence (low to high) and the level of impact the decision or project may have on them (low or high).

Decide how best to meet the needs of those identified based on their level of impacts and influence.



Design



4. Engagement Techniques & Tools

The IAP2 spectrum helps determine the level of engagement a decision or project requires and helps establish clear objectives and commitments for how public input will affect the decision. The spectrum increases the level of engagement from left to right, with increasing expectations of public impact, participation, and

costs as you move to the right towards empower. The tools and techniques are determined by the public participation goal or objective. It will be expected that you inform at minimum throughout the project.

	Inform	Consult	Involve	Collaborate	Empower
Public Participation Goal	To provide the public with balanced and objective information to assist them in understanding the problems, alternatives and/or solutions.	To obtain public feedback on analysis, alternatives and/or decision.	To work directly with the public throughout the process to ensure that public issues and concerns are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision-making in the hands of the public.
Promise to the Public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and issues are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for direct advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.
Example Tools	<ul style="list-style-type: none"> • Fact sheets • Websites • Information sessions 	<ul style="list-style-type: none"> • Public comment • Focus groups • Surveys • Public meetings 	<ul style="list-style-type: none"> • Workshops • Deliberate polling 	<ul style="list-style-type: none"> • Citizen Advisory • Committees • Consensus building • Participatory • Decision-making 	<ul style="list-style-type: none"> • Citizen juries • Ballots • Referenda

ENGAGEMENT TOOLS TO CONSIDER

Tool	IAP2 Spectrum	Description
Social media <ul style="list-style-type: none"> • Facebook • Instagram • LinkedIn 	Inform	<p>Social media helps connect information with people. Social media is an immediate way to share information with large numbers of people and provide information that can be easily shared by others.</p> <p>Social media is another way of monitoring public commentary and assessing or responding to misinformation.</p>
Information display at a community event or gathering place	Inform	A display where project information is available, and questions can be asked of staff.
Promotional video	Inform	Short videos suitable for online distribution. They can be used to educate, inform or promote.
Media/News Release	Inform	Used to inform media of a project and upcoming engagement opportunities.
Fact Sheets/FAQs	Inform	Provide commonly requested information about a particular issue or project, usually 1-2 pages and available online or in print. Can be updated as the project advances, based on questions the public have.
E-newsletter	Inform	Community members and interested groups can sign up to Get Involved CRD project page to receive updates and stay informed about projects.
Online Engagement platform Get Involved CRD	Inform - Involve	Create an online space for your project with easy access to information related to engagement topic and feedback opportunity. Interactive features to provide input and ask questions [e.g. Q+A, survey, polls, discussion forums, interactive maps etc.] Level of engagement is determined by the interactive methods utilized.
Presentation	Inform	Offering informative presentations throughout the community can build relationships and share project information. Other tools and methods would need to be used to collect input.
Information Session	Inform	An advertised in-person event where residents can learn more about the topic, including background, process and decision to be made. Staff and technical experts are available to answer questions. May or may not include a presentation, and if so should be communicated.

Tool	IAP2 Spectrum	Description	Continued...
Online Information Session	Inform	An advertised virtual event where residents can learn more about the topic, including background, process and decision to be made. Staff and technical experts are available to answer questions. May or may not include a presentation, and if so should be communicated.	
Surveys (Telephone, mail-in, online)	Consult	Use to obtain data on opinions, concerns, issues, satisfaction levels. Review the CRD survey guide before drafting your survey.	
Focus groups	Consult	Small, often representative or specifically selected group that are facilitated to test ideas or messages and gauge perceptions and opinions. Can be facilitated in-person or online.	
“Pop-up” event	Consult	Provide a temporary physical presence and a way to reach your audience directly. They can educate, raise awareness, and create an opportunity to ask questions of staff or provide feedback. May or may not be advertised.	
In-person open house	Consult	An advertised in-person event where residents can learn more about the topic, including background, process and decision to be made. Staff and technical experts are available to answer questions, and feedback can be collected through 1:1 discussion, surveys, interactive display boards or stations. May or may not include a presentation, and if so should be communicated.	
Online Open House	Consult	An advertised online opportunity where residents can learn more about the topic, including background, process and decision to be made. Staff present materials and plans and participants have opportunity to ask questions/ provide input through interactive features [e.g. Q+A, chat, survey, virtual sticky walls]. May incorporate other technology or software to facilitate conversations.	
Community meeting	Consult	Attending/presenting at meetings organized by a local community group, business, sector or industry interests. Is an opportunity to make presentation, answer questions and depending on their format, potentially an opportunity to pose specific questions to attendees to provide input. Format should be confirmed with organizer prior to attending.	
Site visit/tours	Consult	Tours of an area or project site led by a project manager or another well informed employee or consultant, for interested people and groups, community members, media and elected officials to gain a greater understanding of issues and implications. Attendees can ask questions and provide input verbally, feedback form, roundtable introductions and closing remarks. Site tours are often used to educate and other input methods [e.g. surveys] are used to capture deeper input.	

Tool	IAP2 Spectrum	Description	Continued...
Public hearing	Consult	Official meetings where individuals or groups are invited to share their views on an agenda item. Typically, a formal meeting with legislated requirements. Used to satisfy regulatory requirements such as bylaw readings and land-use matters. Dialogue is time-limited, and comments are recorded.	
In-person Workshop	Involve	A facilitated session to discuss a particular topic. May involve multiple speakers and multiple aspects of the topic results in recommendations or potential solutions. Requires facilitator[s] to moderate overall agenda and group/table discussion. Attendees can provide input that is captured through group discussion, flipcharts, interactive exercises, and/or graphic facilitation.	
Online workshop	Involve	A facilitated online session to discuss a particular topic. May involve multiple speakers, breakout rooms and multiple aspects of the topic and results in recommendations or potential solutions. Requires facilitator[s] to moderate overall agenda and breakout rooms. Attendees can provide input – through breakout rooms, interactive documents, comments in chats, virtual sticky walls, etc.	
Design charrettes [online or in-person]	Involve	Charrettes are designed to encourage the participation of all. It is an intensive planning session where residents, designers and others collaborate on a vision for development. It provides a forum for ideas and offers the unique advantage of giving immediate feedback to the designers. More importantly, it allows everyone who participates to be a mutual author of the plan. Input is captured through group dialogue, written comments on sticky notes, illustrations, and flip charts.	
World Cafes	Involve	An informal conversational process intended to facilitate open and intimate discussion around a certain topic. Working off predetermined questions, participants change tables during the process and focus on identifying common ground in response to each question. Input is captured through flip charts, sticky notes and large group dialogue.	
Deliberative polling	Involve	A random, representative sample is first polled on a targeted issue. After this baseline poll, members of the sample are invited to gather at a single place for a day to discuss the issues.	
Advisory committee	Collaborate	A group of interested people or representatives of interested groups that provide input on a project or initiative. Requires staff support for terms of reference, selection, meeting agenda and minutes and reporting purposes. Input can be collected through meeting minutes, roundtable discussion and breakout exercises with flip charts.	

Tool	IAP2 Spectrum	Description	Continued...
Task force	Collaborate	A group of interested people or representatives of interested groups with Terms of Reference and a limited timeline that provide input on a specific project or issue. Requires staff support for terms of reference, selection, meeting agenda and minutes and reporting purposes. Input is collected through in-depth two-way dialogue, formal recommendations, and meeting minutes. Group methods might be utilized to encourage dialogue and facilitate gathering feedback and recommendations.	
Open space meeting	Collaborate	A participant led discussion ideal for encouraging participants to gain ownership of an issue and come up with solutions. Participants agree on the areas of discussion that have importance for them and then take responsibility for facilitating the sessions. Group methods might be utilized to encourage dialogue and facilitate gathering feedback and recommendations.	
Participatory decision making	Collaborate	Several interested people (residents, staff, experts, etc.) come together to find a common ground or consensus on a solution that will benefit everyone. In a participative decision-making process, everyone has an opportunity to share their perspectives, voice their ideas and tap their skills to improve team effectiveness and efficiency. The participants determine the result, and it is implemented.	
Alternative approval process [AAP]	Empower	Local governments can obtain elector approval through an Alternative Approval Process [AAP]. Information about the issue or opportunity should be provided. Electors then have at least 30 days to sign and submit a response form to the regional district. When 10% or more of eligible electors' sign and submit a response form during an AAP, a local government can proceed to referendum or put the matter on hold and develop alternatives for consideration.	
Referendum	Empower	The official choice in response to a specific question made by casting a ballot.	
Voting	Empower	The official choice made in an election by selecting candidates on a ballot.	

5. Removing Barriers to Engagement

Inclusive engagement is about building strong and sustainable relationships within your community. One of the key components to making public engagement processes responsive, inclusive, and culturally appropriate is building the capacity of staff to understand the implications of age, gender, race, culture, and socio-economic status on public process.

Effective public engagement takes careful planning and acknowledgement that each population that we work with is a unique opportunity to broaden our understanding of what makes a community, and we have a responsibility to seek out underrepresented voices that may be affected by decisions.

1. Build personal and organizational relationships with people within your region, including marginalized and equity-seeking groups.

- Are there key individuals or groups you already have or should be building a relationship with?
- Is there someone else in the organization who already has these relationships?

2. Consult the religious, cultural and dates of significance calendar when selecting your engagement dates.

- Are there events or occasions that may prevent participation?

3. Provide pre-registration opportunities that identify accessibility needs of attendees.

4. Create a welcoming atmosphere.

- Does your process reflect, honour, and welcome all members of the community?
- Do the venues you choose invite participation and engagement?
 - Choose gathering places that are comfortable and that are conducive to the interactions that you want to have.
 - Choose technology that is accessible to all, or alternate ways for providing input.

Common barriers to participation:

- Lack of awareness
- Transportation
- Language
- Childcare
- Lack of trust
- Day or time of day
- Technology
- Accessibility

Insights about engagement with CRD public activities - from the 2024 Resident Survey

- Awareness is the primary barrier (63.7%)
- Trust/value perception issues (22.4%) indicate communication gap
- Time constraints (21.6%) suggest need for flexible engagement option
- Multiple barriers often overlap, requiring multi-faceted solutions

5. Increase accessibility.

- Is the venue accessible to people with physical disabilities?
- Is the venue accessible from various modes of transportation (buses, cyclists, pedestrians, etc.) and offers adequate parking?
- Is the technology accessible and commonly used by those participating?
- Do the online tools offer captions and transcription for those who may be deaf or hard of hearing?
- Do the images online include descriptions which can be read by screen readers for those who are visually impaired?
- Are there other barriers or issues that should be considered?
 - Language [e.g. low language ability, literacy]
 - Time of day/day of the week
 - Childcare
 - Power dynamics between and within community groups
 - Food/environmental allergies

6. Develop alternative methods of engagement.

- Do you offer multiple ways for contributing input and feedback? [e.g. online and in-person methods, hard copy of online survey option]

7. Maintain a presence with the community.

- Are there community events that you can participate in that people will already be gathering for?
- Are there opportunities for you to meet community members and build relationships?

8. Partner with diverse organizations and agencies.

- Are there organizations that have relationships with the people or communities you are looking to reach that you can connect with (remember to consider power dynamics)?

Things to Think About

- What language, images or messages associated with this program, service or initiative could be used to cultivate inclusion?
- Are there any language, images or messages that reinforce stereotyped narratives or dominant cultural norms? If so, how will these be assessed and remediated?
- Is there a need for communications materials (i.e. safety information, posters, brochures, etc.) to be translated into languages other than English?
- What accessibility considerations need to be addressed to ensure equitable access to information and events for all people?

6. Developing Key Messaging

Consistent and plain language messages are critical to the success of the process. This information will help encourage the public to take interest and participate in the decision-making process and will be used to guide media interviews, social media, speaking remarks, and print materials.

Clear	Present the information in accessible, plain language and use visuals to support understanding where possible, and at an easy-to-understand, Grade 8 reading level.
Concise	Use brief, bulleted lists for quick understanding instead of wordy paragraphs.
Concrete	Convey factual information in a straightforward manner. Avoid speculation and take care to remove any bias.
Correct	Fact-check your copy carefully to ensure the information is accurate.
Coherent	Eliminate wordiness and technical jargon.
Complete	Check with people in other departments to ensure you have not missed key information.
Courteous	Be respectful of the time and effort participants are giving. All points of view are valuable.

KEY MESSAGE ELEMENTS

- Develop three to five key messages
- Keep sentences short and create stand-alone sentences — provides less opportunity for the information to be taken out of context
- The basic elements of messaging should include the elements of the 5 W's and H: Who, What, When, Where, Why and How.
- Provide context that compels the listener to care or want to learn more
- Reference where the strategic direction or context has come from (e.g. Regional Growth Strategy, Strategic Priorities, Master Plan, Financial Plan, etc.)

KEY MESSAGE TIPS

- Use simple words, avoid jargon or buzzwords
- Avoid qualifiers such as “I think,” “I believe,” “I feel,” and “I hope” – makes the speaker sound uncertain
- Use active language, not passive
- Use words that help paint a picture in the listener’s mind
- Avoid references to internal terminology such as projects, process and programs
- Identify a few key facts or data that support your key messages
- Use language that is inclusive and appropriate

KEY MESSAGE EXAMPLES

Key messages will summarize the key components of the decision/opportunity: the timeline, who makes the decision and how the public can get involved.

Decision/Opportunity The regional district is considering options for upgrading a recreation facility and is seeking the public's input to inform their decision.

Who The Capital Regional District's recreation commission is planning for the future as our community grows and changes.

What The recreation centre requires significant investment to repair the building and continue to serve the needs of the community. The area has grown and changed over the years, so it's important to hear from residents about what is important to them when planning for future investment.

When The recreation commission will decide how to proceed with improvements to the facility as part of its capital planning process this fall.

Where To learn more, complete an online survey, and find details for the upcoming information session at getinvolved.crd.bc.ca

Why Recreation facilities and programs support the health and well-being of our community. They create safe and affordable spaces to bring the community together. This facility has served generations of families in this area and as community needs change, facilities must also change.

How The commission will have several considerations when deciding how to proceed. They will have to consider the condition of the building, overall community needs, affordability, and the input of facility patrons.



7. Privacy Considerations

When we design public engagement activities, we will most likely be planning to collect personal information from participants. This could include information such as names, contact details, opinions, demographic information, or even videos and photographs.

It's important to protect this information to respect individuals' privacy rights under the Freedom of Information and Protection of Privacy Act (FOIPPA). This includes:

- Using the correct tools
- Determining if you need to ask specific questions or collect input
- Determining what you will do with information once it is collected

Gathering input of any kind requires a privacy impact assessment. A standardized template for use of the engagement platform is available to streamline this process.

[PIA CHECKLIST](#)

Building privacy protections into the design of all CRD public participation initiatives helps ensure that people feel safe participating and that their information is handled responsibly. It also helps prevent misuse, accidental sharing, or loss of sensitive data.

Considering privacy from the start—sometimes called “privacy by design”—is a best practice that builds trust and reduces risk for both the public and the CRD. To do this effectively, it's important to connect early with the Privacy and Information Services team. They can help identify potential risks, recommend safeguards, and make sure that personal information is collected, used, and stored properly.

8. Budgeting for Effective Public Engagement

It is important to anticipate the costs associated with engaging the public and these should be outlined within the overall project budget. Also, recognize that when engagement efforts have not been funded appropriately there is risk to the overall project. Less than adequate engagement can potentially result in higher costs overall if there are delays or additional engagement is required.

Consult with the First Nations Relations team on estimating budget required specific to any First Nations engagement process early on and ahead of setting your public engagement budget.

Reflecting on the IAP2 spectrum, the more intensive the engagement promise is, the higher the cost to implement. These costs should be included in the engagement plan.

Potential Costs

Consultants/Contractors (if required)

Public engagement consultant, Communications consultant

Data gathering

Public opinion polls/surveys, Online surveys, Facilitator(s), Focus group

Technical requirements

Computer analysis, AV Equipment (podium, screens, speakers, laptop set-up and rental), Captioning [if required]

Logistics

Venue, Refreshments, Security/Parking attendants, Tables and chairs, Interpretation/Translation, Insurance, Assistive hearing devices, described audio, and accessible outdoor surfaces, Transportation [if required]

Communications

Graphic design [layout of posters, digital ads, display boards etc.], Print advertising, Online advertising, Website development and maintenance, Web-casting sessions, Print materials, Presentation materials, Signage, Professional photography/videography

INTERNAL RESOURCES

Staff resourcing [estimated hours/weeks]
Special event costs (overtime or callouts for set-up, deliveries, take down)
Additional internal consulting costs

9. Engagement Plan Template

Once a problem or opportunity requiring public awareness or participation has been defined a detailed engagement plan should be developed to outline all elements of the process. Having information contained in one location creates a quick point of reference and ensures that all aspects of public engagement have been considered. This is intended to be the internal playbook and contain all things to be considered, done and by whom.

[ENGAGEMENT PLAN TEMPLATE](#)

Engagement Plan Highlights

Prepare an Engagement Highlights Summary to share with the Board as part of a staff report then with participants by posting it on the project web page. Details can be cut and pasted from the internal engagement plan for consistency.

[ENGAGEMENT HIGHLIGHTS TEMPLATE](#)

Engagement Approvals

An approved engagement plan is mandatory for all projects requiring public engagement. In addition, specific communication deliverables such as media releases and engagement deliverables such as surveys have an internal review and approval process. Review the Approval Guidelines to help inform your work plan and timelines.

[APPROVAL GUIDELINES](#)

Promote

10. Social Media

Social media can be a powerful, efficient, and cost-effective way to engage and inform the community. Through short, visual messages, the public can stay informed about the projects and issues that matter most to them, and they can share the information with their networks.

Tips for posting

- Be consistent
 - Tone of voice (friendly and informative)
 - Use interesting, colourful, or clever visuals (video or images)
- Focus your messaging
- Determine which hashtags will help reinforce or share your message
- Measure and analyze results through analytics, comments and shares
- Share information that is related or reinforcing of your messaging

Corporate Communications & Engagement is responsible for preparing and posting content to the CRD's social media channels.

11. Media and Emails

Liaise with Corporate Communications & Engagement to announce the beginning of your initiative and how to get involved. This typically includes a media release and an email to subscribers who have signed up for news and/or engagement updates for each community impacted by your initiative.

The 2024 Resident Survey revealed the following insights:

- Email dominates as the preferred communication method at 67.9%, followed by text messaging at 43.8%, indicating strong preference for direct digital contact.
- Traditional media channels maintain significant relevance, with radio (36.6%), newspaper (29.9%), and television (26.9%) reaching substantial audiences.

12. Creating Your Project Web Page

Keep the audience you are writing for top of mind as you prepare content for the Get Involved platform. What you're writing should be like a conversation with a friend.

Write the way you speak

- This is a common rule in web writing. The content that you create should be like a conversation between two people. Stuffy language can get in the way.
- One of the easiest ways to write as you talk is with contractions. People talk in contractions — like can't and don't — and using them helps people relate to what you're writing. The important thing to remember, though, is not to overuse them. Only use them when they sound natural.
- Remember to use the active voice. For example, instead of writing, "The bill should be paid by the property owner," we would write, "The property owner pays the bill." It's much simpler and more direct.

Be short and to the point

- If a headline is longer than 11 words, it's probably too long. Use full names and titles in headlines.
- Paragraphs should be two to three sentences at most.
- Aim for a sentence length of 15 to 20 words. For example: "Perhaps more important than firefighting itself in many modern industrial countries is fire prevention," could just be: "Fire prevention is important."
- Keeping things brief can also increase readability and make the site more user-friendly for people using smartphones or tablets.
- Break information into 'chunks' by using shorter paragraphs, bulleted lists, and headings to break up text and indicate a structure for those scanning the page. This will also help people using screen readers.

Jargon and government legalese

- We should be writing to the person with the least amount of knowledge on the topic.
- Don't be afraid to say "we" instead of "The District." Instead of "residents" or "applicants," consider saying "you."

Run-on sentences and multiple commas in a sentence

Use periods where you can, it will help a reader digest the content.

Words like "may" and "shall"

- When something needs to be done to complete a task, make sure a resident knows by using strong words like "must."

Acronyms

- A web page shouldn't require a glossary of terms or a legend for acronyms. Spell out what you're talking about in detail.

Symbols

- While symbols — like "&" and "@" — can shorten your text, it is better to spell out what you're writing. Symbols like these will only confuse your readers, especially those who may be learning English as a second language.

Visuals

- Visuals should add value to the text, helping communicate complex concepts and reduce the amount of text required.
- Videos, photos, charts and diagrams can increase accessibility for those with literacy or language barriers making the information more universally understood.
- Always include "alternative text" to convey the meaning and context of a visual.

Repetition

- If the full title of person or place has been used already as a first reference on the page, we don't have to repeat that full title. "Board Chair Jane Doe" would simply become "the Chair" later on the page.

Refer to the corporate writing style guide and graphic standards to ensure our materials are consistent.

13. Writing Style Guide

We are committed to creating content that empowers, educates, and guides our residents. We can achieve this by making our messaging clear, relevant, interesting, and engaging.

Only experts can make what's difficult look easy, and it's our job to demystify topics and educate.

Define technical terms in plain language and ensure you have provided enough information on the topic before asking them for input.

Use short sentences as much as possible and keep it to one thought per paragraph. Brevity is key! This can also help readability and make the information more digestible for people using mobile devices.

Canadian Press Style Guide

Media and communications materials, including media releases, follow the writing standards outlined in the Canadian Press (CP) Style Guide. The *CP Style Guide* is updated routinely by the Canadian Press and is followed by media and most public sector agencies to ensure consistent written style and formats. A hard copy is available from Corporate Communications & Engagement.

WRITING STYLE GUIDE

Connect

14. First Nations Territorial Acknowledgement

Acknowledging the traditional territory or land in which we work is a way to pay respect to First Nations people who were here before settlers, and to educate and remind us all of the long-standing relationship First Nations have with the land and waters where we have come to be. It encourages us to learn more about the people whose lands we live on, wherever we come from, and to learn more about our history and relationships. It is also a reminder that we are all responsible for these relationships.

An acknowledgement is recommended at the commencement of CRD hosted events, ceremonies or gatherings, or for formal greetings or remarks. We can also use this acknowledgement any time we come together as staff colleagues.

The following acknowledgement is provided as a starting point to speak to at the commencement of a CRD-hosted event or workshop and should be done mindfully as a way to learn about the Territories and Nations you are acknowledging. If possible, find a way to say something about why this matters to you personally or how it connects to the work.

The CRD conducts its business within the Territories of many First Nations, including but not limited to BOKEĆEN (Pauquachin), MÁLEXEĒ (Malahat), paa?čiid?atx (Pacheedaht), Spune'luxutth (Penelakut), Sc'ianew (Beecher Bay), Songhees, STÁUTW (Tsawout), T'Sou-ke, WJOLEĒP (Tsartlip), WSIKEM (Tseycum), and x^wsepsum (Kosapsum) Nations, all of whom have a long-standing relationship with the land and waters from time immemorial that continues to this day.

When hosting a larger community event or official opening, it may be appropriate to request a local Elder to do a welcome to the territory in accordance with protocol. Reach out to the First Nations Relations division for support with this.

It's also important that you clarify up front that First Nations engagement may be occurring through a separate and distinct process. This helps ensure transparency and respect for parallel engagement efforts. Before your session, please check with the First Nations Relations (FNR) team to confirm whether a separate engagement process is underway.

Writing guidelines

Specific style standards in the CRD Writing Style Guide pertaining to First Nations Relations are presented in Section 13.2, First Nation as Government.

As appropriate, use First Nation or Nation. It is becoming more common for communities to prefer Nation over First Nation. Some Nations emphatically do not like to be referred to as a First Nation. Therefore, when referencing the two neighbouring Nations: "met with Songhees and x^wsepsum (Kosapsum) Nations" or "met with Songhees Nation and x^wsepsum (Kosapsum) Nation". Use the Nation's preferred language, spelling, capitalization, and pronunciation.

First Nations are an order of government on par with the Crown. When listing agencies and institutions, First Nations should be referenced either before or immediately after the federal government. "The CRD has partnered with First Nations, federal, provincial and local government to..."

Additionally, when writing and speaking, Indigenous Peoples can be used interchangeably with First Nations, although it is preferable to speak to the specific Nation when possible. Indigenous is appropriate when speaking of urban diaspora communities and when many different nations are included, ie. CBC Indigenous. Indigenous is generally capitalized when used in this context.

15. In-person Event Checklist

When determining whether to have an in-person or virtual meeting, several elements should be considered. If the meeting requires deep collaboration, brainstorming, or relationship-building, an in-person meeting may be more effective. Conversely, if the meeting is primarily informational, or if attendees are participating across a broad geographic area, a virtual format might suffice. Technological availability, time constraints, cost and engagement levels are also important considerations.

Venue and timing

- Choose a venue that will accommodate more than the number of people you expect
- Choose a venue that is accessible for those with mobility, sensory, visual or hearing needs and meets physical accessibility standards
- Consider accommodation of a variety of needs, including assistance dogs, walkers, wheelchairs, scooters, and strollers
- Choose a venue that is inclusive of diverse races, cultures, and gender identities
- Consider how the venue supports multiple transportation modes, vehicle and bike parking, and bus routes
- Sufficient parking
- Visit the venue the same time of day as your event is planned to assess the natural light or additional lighting needs
- Consider the acoustics and temperature of room
- Confirm what other events are occurring during the time of your event
 - Will those events attract or detract people from attending?
 - Will those other events create conflict or excess noise?
 - Will there be enough parking for attendees with another event taking place?

- Confirm any audio-visual needs and whether the venue can accommodate them — consider the needs of deaf and hard of hearing participants to help determine whether captioning or ASL interpreters are needed
- Confirm where the washrooms and emergency exits are located
- Confirm who will be on-site during your event and obtain their contact information
- Confirm what time you can access the venue to ensure ample time for setup and take down
- Confirm garbage, recycling, and compost equipment receptacles or availability
- Confirm availability of table and chairs — including room setup
- Check that emergency evacuation procedures are in place for all individuals, including people with disabilities and seniors.

Invitations and promotion

Provide ample (minimum of two weeks) notice for people to participate and use multiple channels to reach the broadest audience. Communicate your event broadly using multiple methods:

- Direct invitation to those most affected or interested, by email, phone call or mail [e.g. letter or postcard]
- Social media
- Posters (in the community and on buses)
- News release
- Print or online advertising
- E-newsletters
- Outreach to interested groups who are typically underrepresented
- Email to municipal partners
- On CRD website events calendar

Invitations

- Inviting people — provide a way for people to reach out in advance to include contact information (phone, email) on all materials so attendees can request assistance when they RSVP.

For example, you could say: If you require any assistance or accommodations, please include this information in your RSVP by (date), or contact (name/ phone/ email/) by (date)

- Include information on accessibility features, such as ASL interpreters, real-time captioning, closed loop audio systems, dietary accommodation, non-toxic materials and accessible entrances and parking, as well as a map on how to get to the event with pick-up/drop-off locations
- Ask attendees to not wear scented products
- Avoid embedding essential information in graphic formats because they can't be read out to people using assistive technology such as screen readers
- Use captions and audio descriptions for videos

Supplies

- Clearly marked container for feedback forms, surveys or comment cards
- Nametags for key attendees and staff
- Business cards
- Miscellaneous items: tape, zap straps, scissors, large envelopes, band-aids, paper clips, large clips, elastics, petty cash, etc.
- Attendee counter or "clicker"
- Pens, pencils, permanent markers, colourful markers
- Door signage or sandwich boards to help attendees find the room
- Easels and flip-chart paper
- Feedback forms/comment cards
- Audio-visual equipment – laptop, projector, speakers, microphone, HDMI cords

- to connect laptop to projector, presentation remote, USB, screens
- Visual aids — posters, maps, PowerPoints, background reports, etc.
- Consider the need for assistive hearing devices, Vocal Eye described audio, and accessible outdoor surface, such as Mobi-Mats (portable mats that make the ground more accessible and smoother), assistive hearing devices and receivers (Auracast)
- Notice of filming or photography if video or photos are being taken
- Photo release form if planning to publish an identifiable person's image
- Podium
- First Aid kit
- Refreshments (coffee/tea, cookies, muffins)
- Large format paper, sticky notes (various colours and sizes), Sticky dots
- Table linens
- Tables and chairs
- Venue contacts and key contact information
- Water for presenters
- Children's activities – Lego, books, colouring posters and crayons
- Dog treats and water bowl [if pet friendly event]

Notice of Photography Signage

Create and post a notice of photography sign in a visible place at or near the entrance to ensure you have notified attendees that you intend to capture and share photos of the event publicly.

Provide an option for those who would prefer not to appear in photos. An arm band, large sticker or vest might be offered to differentiate them in group photos.

[DOWNLOAD TEMPLATE](#)

Staff roles at event

- Ensure you have included enough staff to help set-up, facilitate and take down event
- Establish clear roles and responsibilities for the event (set-up, reception, facilitation, assistants, technical experts, media spokesperson, who will give the territorial acknowledgement etc.)
- Meet prior to event start time to discuss what may occur at the event and ensure staff have a shared level of understanding about key elements of the issues and event — including what happens after the event
- Attendees should be greeted and thanked as they leave
- Acknowledge the traditional territories your organization is on/where the topics/issue is affecting
- Take photos of comment boards, flipcharts, or interactive display boards to record visually and for quick reference what was heard. These photos can also assist with data entry and reporting after the event
- Take photos of the event with identifiable faces hidden from plain view
- Determine who is taking the data (notes, flip charts, etc.) or input from the event and what is being done with it
- Track how many people stop to talk, take material, what questions are commonly asked etc. (this data will be included in the What We Heard summary)
- Ensure attendees are aware of next steps or where they can go for more information after the event
- Debrief at the end of the event to share staff perspectives about what was heard, what was surprising, what worked well, what should be done differently in future

Hosting a meeting

- Provide a short, clear introduction that welcomes attendees:
 - Introduce who you are and what other employees or consultants are participating in the session
 - Articulate a clear purpose and the length of the session, as well as how and when input will be collected
 - Share what feedback you are inviting and what happens with the input after the session.
- If addressing a group, share expectations for a respectful and effective meeting:
 - Honour the time we have together
 - We all share the responsibility for an effective meeting
 - Respect the diversity of experience and wisdom of all here
 - Everyone has a voice
 - Challenge ideas, not people
 - Speak to be understood, listen to understand
 - Aim to add to the conversation, avoid duplication
 - We may need to move along from an idea — there will be opportunities to provide feedback after the meeting.

Accessibility Considerations

- Provide any contractors with a copy of these accessibility guidelines and clearly communicate that you expect contractors will adhere to the guidelines wherever possible
- Consider accessibility requirements for a variety of needs, including sensory, communications, chemical sensitivity, and mobility needs
- Consider accommodation of a variety of needs, including assistance dogs, walkers, wheelchairs, scooters, and strollers
- Plan your event as far ahead as possible (especially large events), to:
 - Allow enough notice for attendees to arrange HandyDART transportation and accompanying assistance. E.g. HandyDART users require more time than those who travel independently.
 - Arrange any on-site services needed, such as American Sign Language (ASL) interpretation. It takes at least two weeks to arrange for on-site assistance such as ASL.
 - Arrange for Braille transcription at least 4 weeks before your event.
- Provide an ASL interpreter, especially for events with more than 100 people
- Provide real-time captioning, especially for events with more than 100 people, and ensure your site has technology to support this

Choosing accessible venues

- Schedule an on-site visit before you reserve the venue
- Consider inviting individuals with various needs, such as mobility and sensory needs, in your on-site visit
- Consider the timing of your event, avoiding early morning and late evening, if possible
- Many seniors/elders and people with disabilities need assistance, which is often difficult to arrange early and late in the day
- Limit external noise

Entrances, exits, pathways, hallways, corridors

- Clearly marked
- Turning space with a six-foot diameter
- Minimum 39 inches wide
- Free of any impediments or tripping hazards
- Preferably no lip or a maximum lip of one-half inch beveled
- Smooth, level surface with no stairs
- Avoid slopes where possible (no more than 5% slope)

Well-marked paths at entrances with information about accessibility throughout the trail or path (for example, identify any interruptions of the accessible surface, such as steps, steep slopes, and so on)

Doors

- Ensure automatic door openers are activated (otherwise, wedge the door open if allowed by fire regulations)

Elevators

- Minimum 36-inch opening
- Large enough to accommodate a person with motorized wheelchair or scooter, and an attendant or assistance dog

Lighting

- Avoid dark and muted venues
- Ensure adequate lighting in parking locations, venue, and so on
- Avoid use of strobe lighting (it can trigger a seizure for people with epilepsy)

Ventilation

- Ensure ventilation of fresh outside air so people with chemical sensitivities are more comfortable
- Be aware of any ongoing construction or remodeling that could impact the circulation of air-borne allergens such as dust, paint fumes

Acoustics

- Consider the impact of ambient noise for people hard-of-hearing

Surfaces

- Level and smooth
- Concrete, asphalt, compacted crushed granite or limestone, linoleum, and tight-weave carpets without underlay
 - Grass is not accessible when wet
 - Wood chips or bark mulch are not accessible surfaces
 - Drain rock is not an accessible surface
- Avoid slopes where possible (no more than 5% slope)

Washrooms

- Washrooms and change rooms are inclusive of all
- At least one washroom large enough to accommodate a person with a motorized wheelchair and their attendant
- At least one single-user washroom with signage to reflect universal, functions-based designation
- For outdoor events, provide wheelchair-accessible portable toilets and ensure that people using motorized or manual wheelchairs can get to them on accessible surfaces

Stages

- Stage entrance must be level, gently sloping, ramped, or have a lift
- Ramp slopes no more than 5%
- Provide a stand-alone microphone (wireless or with an adjustable stand) for people who need to sit or use mobility devices
- Podiums are at least one metre away from the stage edge, to prevent accidents and falls for speakers who are blind or partially sighted, who may not be able to see the end of the stage
- Lecterns can adjust to different heights for people who need to sit or use mobility devices, or use two lecterns with different heights

Pathways

- Pathways to displays, stages, speaker's podium should be minimum 39 inches wide, and include turning circle space with a diameter of 6 feet
- Pathway slopes no more than 5%
- Consider tripping hazards, obstacles, stairs, curbs, and bumps that would prevent people using wheelchairs, walkers, or canes from navigating the pathway

Parking and pick-up/drop-off

- Minimum 2% of total parking available should be accessible and at least 4 spaces more than anticipated
- Spaces should be at least 8.5 feet wide with adjacent side and rear access of at least 6.6 feet wide
- Two accessible parking spaces may share a common access aisle
- Clearly marked location for HandyDART and taxi
- Ensure there is clear access to the HandyDART pick-up location after the event ends, until all attendees waiting for HandyDART have been picked up

Signage

- Clearly and visibly signed accessible entrances, parking, washrooms, public phones, transit points, and other conveniences
- Consider translating existing signage with multiple languages to increase understanding and avoiding confusion among users
- Avoid using gender symbols of bodies and focus on function symbols
- Use high contrast colours — light text on dark background or dark text on light background
- Use a text size of at least 14 point and sans serif font, such as Arial
- Provide signage in three formats if possible — tactile graphics, tactile lettering, and Braille
- Place signage at eye level for people seated in mobility devices (1.2 m from the floor, based on the City of Toronto standard)
- Ensure signage does not block sidewalks or create a trip hazard
- Signage asking attendees to not use scented products

Seating

- Avoid designating a single area “for wheelchair use” — this segregates and stigmatizes individuals using wheelchairs, prevents them from having the same choices as other attendees, and prevents them from being seated with friends and colleagues
- Provide sufficient places with no seats for people in wheelchairs or scooters to use. If possible, scatter these throughout the venue
- Where seats are movable, provide areas by the aisles with no chairs so people with mobility aids can maneuver into these spaces
- Ensure aisles between seating rows are wide enough for people using mobility aids — a minimum 36 inches of clear space
- Provide seats near the front of the room for people with visual or hearing needs with clear access to ASL interpreters and speakers
- Ensure there are chairs directly in front of the real-time captioning screen for people who are deaf or hard of hearing

Tables

- Provide sufficient space between tables for people using mobility devices and assistance dogs to go between
- Ensure the space between occupied chairs from adjacent tables is at minimum 36 inches
- Have one chair missing from each table for people using mobility aids

Counters and reception desks

- Ensure desks are 29 to 34 inches from the floor, to ensure people using mobility aids can access the desks
- Offer scent-free sanitizers

On-site assistance

- American Sign Language (ASL) interpreters – reserve space on stage and microphone for interpreters when speaking for a deaf person
- Real-time captioning — provide a large screen in front of room and seats provided in the front for people who are deaf or hard of hearing
- Provide interpreters and real-time captioning with prior information on program content and length, copies of speaker notes, and PowerPoint presentations, titles, and any technical language or unique features
- Arrange escorts to the stage for attendees who are blind or partially sighted. Escorts should communicate where the edge of the stage is and stay with the attendees to escort them to and from the stage
- Consider language translation
- Consider assistive hearing devices, Vocal Eye described audio, and accessible outdoor surface, such as Mobi-Mats (portable mats that make the ground more accessible and smoother)

Displays and exhibits

- Consider the display height so they're accessible to people using wheelchairs or scooters
- Consider the use and location of tablecloths that could impede wheelchairs or scooters.
- For guidance, refer to the [Smithsonian Guidelines for Accessible Exhibition Design](#)

Food and beverage

- Accommodate food sensitivities and dietary requests
- Label accommodated meals
- Consider serving accommodated meals first in case a correction is needed, however, be mindful that all attendees want to enjoy their meals at the same time
- Offer non-plastic containers and bendable straws
- Clearly label ingredients
- Provide water, and provide help pouring
- Avoid sharp objects such as toothpicks
- Communicate dietary accommodations to caterers, and ensure they follow through

Staff and volunteer training

- Designate a person trained on accessibility issues as a resource to staff, volunteers, and attendees for any questions, issues, or emergencies both before and during the event
- Provide orientation to all staff and volunteers, including ushers on accessibility features of the event venue
- Provide training on assisting seniors/elders and people with disabilities about seating, mobility, bathroom, food, drink, getting items, and escorting to the stage

- Ensure emergency evacuation procedures are known and assign specific individuals to assist people with disabilities and seniors
- If food is served buffet-style, ensure that food ingredients are well labelled or that staff and volunteers know the ingredients
- Develop and introduce a trans* and gender-variant inclusion information session for staff and contractors

Event materials, presentations, and attendees

- Use non-toxic materials, such as unscented markers and non-plastic name badges
- Use high contrast colours — light text on dark background or dark text on light background
- Use a text size and sans serif font that is easy for all to read.
- Offer materials and agendas in advance, in digital, large print or Braille formats if requested
- Consider using captions and audio descriptions for videos
- Ask speakers and presenters to verbally describe any visual content in their presentations
- Ask speakers and attendees to identify themselves by name each time they speak for the benefit of visually impaired individuals
- Ask speakers and attendees how they want to be referred to — by name or pronoun. Pronouns may be either feminine (she, her, hers), masculine (he, him, his) or gender-neutral (they, them, theirs)
- Welcome participants using gender-neutral terms (such as people or folks) — not ladies and gentlemen or guys

Assistance dogs

- Designate an outdoor toilet space
- Provide a waste bin
- Provide water bowls

16. Online Event Checklist

Online engagement should embrace the same thoughtful approach to planning as in-person. It's important to anticipate and plan for providing a positive and meaningful attendee experience. Establishing clear engagement objectives for your project will determine whether an online meeting is a suitable tool for your topic.

Important to consider

- Who will attend and what is their comfort or familiarity with online technology?
- How will feedback be collected in the session?

Scheduling a meeting

- Include a clear title for your session, that is consistent with other tools being used to promote the meeting.
- Set the duration with care. A typical online session is one hour, including questions, and never over two hours.
- A waiting room can be enabled so you can see who has arrived and can officially start the meeting when ready. Waiting rooms are useful for protecting the personal privacy of external participants. The waiting room message can be personalized so they know they are at the correct meeting place.
- Event should require registration. The RSVP option should be included in an invite and the link should be included in communications materials. This creates an opportunity for people to share with any accommodations they may need well in advance. Registration also allows you to estimate the number of attendees and email them reminders closer to the date.
- Ensure the meeting invitation includes information about privacy information and where their information may be stored. Also include tips to help protect their privacy.

- Ensure promotion of the event outlines the format of the event [e.g. presentation, moderated, Q+A]. Plan to record sessions that are open to the public for those who cannot attend 'live' but may wish to watch later to learn more.
- If session is being recorded make sure that is clear to all attendees and communicate the benefit of recording to those who could not make it.

Preparing for an Online Event

- Schedule time to rehearse with staff [and any consultants] team beforehand. Take the opportunity to test internet connection, monitor, headphones, audio levels, and sharing of files. Practice, practice, practice!
- Review branding options for the platform and ensure they are consistent with organizational brand standards.
- Ensure the backdrop is appropriate and well-lit. Consider a branded virtual background if needed.
- Participant experience is important, and the input collected is key to decision-making. Role play with colleagues to test how you will solicit and collect input – e.g. chat room, question and answer and telephone.
- Identify a colleague who will assist in moderating, keeping notes and providing support as needed.
- Have a way to communicate with meeting leads while meeting is happening established in advance – separate chat, texting, etc.

Meeting roles

To ensure a successful online meeting, several key roles can be assigned.

- 1. Facilitator/Host** Responsible for guiding the meeting, setting the agenda, and ensuring that the discussion stays on track. Manages time effectively and encourages participation from all attendees.
- 2. Note-Taker/Recorder** Documents key points, decisions, and action items during the meeting. Distributes meeting minutes afterward to ensure everyone is on the same page.
- 3. Timekeeper**
 - a. Monitors the time allocated for each agenda item and alerts the group when it's time to move on.
 - b. Helps maintain the meeting's schedule and ensures that all topics are covered.
- 4. Participant/Contributor** Engages in the discussion, shares insights, and provides feedback. Actively and respectfully listens and contributes to the conversation, ensuring a collaborative environment.
- 5. Technical Support** Assists with any technical issues that may arise during the meeting, such as connectivity problems or software malfunctions.
- 6. Moderator** Manages the flow of conversation, especially in larger groups or meetings. May handle Q&A sessions, ensuring that questions are addressed in an orderly manner.

Hosting a meeting

- Arrive early to your online meeting so you are ready to go when participants arrive. Start on time. If you have started the session but are not ready to begin, signal to those in attendance that you will wait a few minutes to begin.
- Provide a short, clear introduction that states:
 - Who you are and what other employees or consultants are participating in the session
 - If you're recording the session, ensure you let attendees know it is being recorded.

- Acknowledge the traditional territories your organization is on/where the topics/issue is affecting.
- Articulate a clear purpose and the length of the session, as well as how and when input will be collected (e.g. throughout, or at the end)
- Share what feedback you are inviting and what happens with the input after the session.
- Share how they will respond to open ended questions, when invited- type in chat, raise hand on video or come off mute.
- Emphasize the importance of personal privacy and respectful dialogue:
- Protection of personal information is important; please note we do not require any personal information during this meeting, and we encourage you to turn off your mic and video when listening. Offer the opportunity for those who are uncomfortable with being recorded to exit the session.
- Outline how participants can edit the information that others see (e.g. name that is displayed)
- Share respectful meeting expectations
 - Honour the time we have together
 - We all share the responsibility for an effective meeting
 - Respect the diversity of experience and wisdom of all here
 - Everyone has a voice
 - Challenge ideas, not people
 - Speak to be understood, listen to understand
 - Aim be additive, not duplicative
 - We may need to move along from an idea – there will be opportunities to provide feedback after the meeting. [email, survey, etc]
- Try not to talk for too long without checking in with the attendees – this will help keep participants engaged. Check for chat comments or consider using a quick poll or raising of hands to gauge where people are at.
- If there are specific questions being asked of participants, be sure to have a clear format for those questions and a corresponding timeline to keep the agenda on track. Put the question on the screen or read it aloud so it is clear to participants.

Interactive features

Moderated discussion

Participants can verbally ask questions or provide comment if their microphone is unmuted. The facilitator should outline when and how comment and questions should be received during the session to ensure a productive and timely format is followed. Comments or feedback could be welcomed throughout, or a facilitator may plan opportunities at specific times, or at the end of a presentation. In combination with the chat or raise hand function, participants can indicate their desire to pose a question or comment, and the facilitator can then pause and engage when appropriate. To limit background noise in large meetings, the host should let participants know that they will mute all microphones until they are ready to receive questions. This will limit background noise.

Polling

Poll questions are another way to engage participants. Polls can help keep the content dynamic while keeping participants engaged. The polling feature allows you to create single choice or multiple-choice polling questions for your meetings. You should plan questions and set up polls when planning and scheduling the meeting. Polls allow for you to gather (and share) immediate responses from your attendees.

Examples of useful ways to use poll questions:

- Create an icebreaker and get the interaction started
- Let your audience inform the content — e.g. where would you rank your level of understanding about this topic?
- Get input on the meeting — e.g. would you prefer to ask questions throughout, or at the end?
- Learn where people are from — e.g. which municipality do you live in

Chat

The in-meeting chat allows you to send chat messages to the other attendees. Consider whether the private chat between attendees should be disabled. In-meeting chat can be automatically saved.

Raise hand

Depending on the video conferencing tool, meeting participants can often simulate a hand raise by placing a “raise hand” icon beside their name to communicate with the host and other participants without disrupting the flow of the meeting.

All participants can see the icons that everyone else has chosen. In addition, the host sees a summary of how many participants are displaying each icon and has the option to remove all feedback when addressed.

Question and answer

The Q&A function in the Zoom webinar tool can allow attendees to ask questions for the host and panelists to answer. The questions can be viewable to all attendees or only to the host and panelists until the questions are answered.

Technology issues

- If you or participants are experiencing lagging or slowness, encourage participants to turn off mic and video when listening.
- Participants can log-off and join the meeting in progress, should they need to reset their computer or settings.
- If you as host have technological glitches — pause, break, rely on co-moderator. If a short break is needed, communicate a five-minute break to resolve the matter.
- If a security breach/unauthorized access to the session were to occur, turn off the host video. Acknowledge it appears a participant is using the technology inappropriately. You may want to pause the meeting for a moment and return shortly. When you return to the session, ask the participants if they would like to proceed with the session. If a second breach occurs, the meeting should be concluded.

Closing a session

- Leave attendees with a call to action and outline next steps.
- Close session with appreciation for their participation and share contact information and project website on a visual.

Follow up

- After event consider sending out thank you messages to attendees with link to engagement platform for more information and updates.
- Consider asking for feedback regarding the experience of the online event to help with the evaluation of the engagement.
- If the event was recorded post the recording so those who were unable to participate can still benefit from the event.

17. Facilitation Tips and Checklist

Whether an in-person or online event, public meetings or events where interested people and groups are brought together to provide input or ask questions about an issue are generally more effective and more efficient if they are facilitated, particularly if the issue is controversial. A facilitator manages the meeting, keeps conversations on track and ensures each participant's voice is heard. This tip sheet will provide some information on how to accomplish these tasks.

What is facilitation? What is the role of a Facilitator?

The definition of facilitate is "to make easier" or "to help bring about". The role of the facilitator is to help the participants work together by providing and managing the meeting process or structure, while the participants remain focused on the meeting content. The facilitator keeps the process on track and moving forward with all participants engaged, making best use of time and resources.

An effective facilitator quickly establishes and builds trust with the group through honesty and transparency in his/her communication. Facilitators must know what questions to ask, when to ask them, and how to structure questions to get good answers without defensiveness. Facilitators should know how to rephrase or reframe questions and comments, giving positive reinforcement, encouraging contrasting views, including quieter members of the group, and dealing with domineering or hostile participants.

Before the meeting

- Know who the meeting participants will be, and which community groups will be represented
- Understand the purpose of the meeting and the desired outcome. What will a successful meeting look like?
- Together with the project lead, establish a structure for the meeting and confirm the agenda
- Select and design a process and agenda for the meeting that will help participants to engage effectively and provide the feedback required
- Have a meeting plan but be willing to be flexible in response to the situation
- Set up the venue or online space, and ensure that other logistical details have been taken care of
- Provide adequate notice of the meeting, its purpose and agenda to participants

During the meeting

- At the beginning of the meeting, with the group:
 - Review the purpose and the expected outcome of the meeting
 - Review the ground rules/expectations
 - Review the items for discussion and the timeline
- Be very clear about your role as a facilitator
- During the meeting, maintain eye contact with participants.
- Try not to talk too little or too much
- You are there to bring out the views and contributions of participants
- Help stimulate discussion in the group when needed, asking the right questions and providing context for the discussion
- Be sure that everyone is heard and able to participate fully
- Know when to draw in those who may not be participating initially, and prevent others from dominating — to ensure that all voices are heard
- Summarize when necessary and build on the contributions of the participants
- Keep the discussion on topic — be aware of when the group is off topic or confused and when structure may be needed
- Explain, summarize and help to paraphrase participants' input when necessary
- Decide when to extend a discussion and when to move the group onto the next topic; remind the group when they are off subject
- Prepare to work through conflicts between participants by creating trust within a "safe space"
- Stick to the pre-determined timeline
- At the end of the meeting, provide closure and reiterate action items/next steps
- Ensure accuracy and that proper record/minutes are kept of the meeting (e.g. record of discussion, decisions made, next steps, action items).

GOOD FACILITATORS

- Value people and their ideas
- Think quickly and logically
- Are excellent communicators
- Are active listeners
- Avoid jargon and acronyms
- Speak clearly, at a moderate pace and an appropriate volume
- Guide the discussion, but don't lead it
- Raise questions to bring out different viewpoints
- Restate ideas when the person presenting them is not clear

18. Survey Design

Surveys can offer a streamlined method for gathering and evaluating public feedback on projects. Survey methodology can vary depending on the input required and who it is required from.

Varying types of surveys

Opt-in survey, with promotion and engagement targeted at key people and groups. To do this demographic data must be collected as part of the survey process. Staff monitor participants, shifting engagement and communications strategies to target underrepresented demographics.

Probability survey, where a random representative sample of the population is selected to complete the survey. This approach ensures a representative sample of responses. This type of survey is usually conducted by a consulting firm specializing in this type of engagement.

Closed survey, This type of survey is limited to those residents that are invited to participate. This can be regulated by unique codes, IP addresses, etc.

Feedback forms can also be utilized in specific instances where input has been collected previously or through other channels. Open-ended feedback forms may be considered when inviting feedback on a draft document.

ASKING/DESIGNING GOOD SURVEY QUESTIONS

Soliciting input

When designing questions to solicit input, you should revisit your public engagement objectives to ensure the questions get to the heart of achieving the objective and collecting the input needed to inform upcoming decisions. Questions are then tailored to the objectives of specific phases or key decision points. A mix of open-ended and closed questions should be considered. Avoid jargon and overly technical information.

Disaggregated data

Disaggregating data means breaking it down into smaller categories based on attributes such as ethnic group, gender, age, income, geography or other relevant factors. When collecting and analyzing input, keep in mind that sometimes the overall trend or pattern can hide key differences in the experiences of specific groups. Consider using disaggregated data to identify gaps and prioritize your outreach efforts.

When asking for demographic information as part of a survey, it's important to have clear objectives and safeguards in place to prevent misuse or harm. Contact the Privacy Office for direction on how to manage disaggregated data and review the [Human Rights Commissioner's Special Report](#) to learn more about this evolving area of practice.

Open-ended versus closed ended questions

Open ended questions ask respondents to respond to a question in their own terms. Open-ended questions allow the greatest variety of responses, but are time consuming to ask and require a lot of work to analyze.

Closed ended questions are questions where the respondent is asked to place themselves into one of a limited number of responses which are provided to them. Closed ended questions, when well designed, ensure that respondents interpret questions the same way.

Respondents are more likely to skip an open-ended than closed-ended question

Review our Survey Guide for more details on how to get started, content and format standards, testing tips, timing and approvals information.

[CRD SURVEY GUIDE](#)

Close the Loop

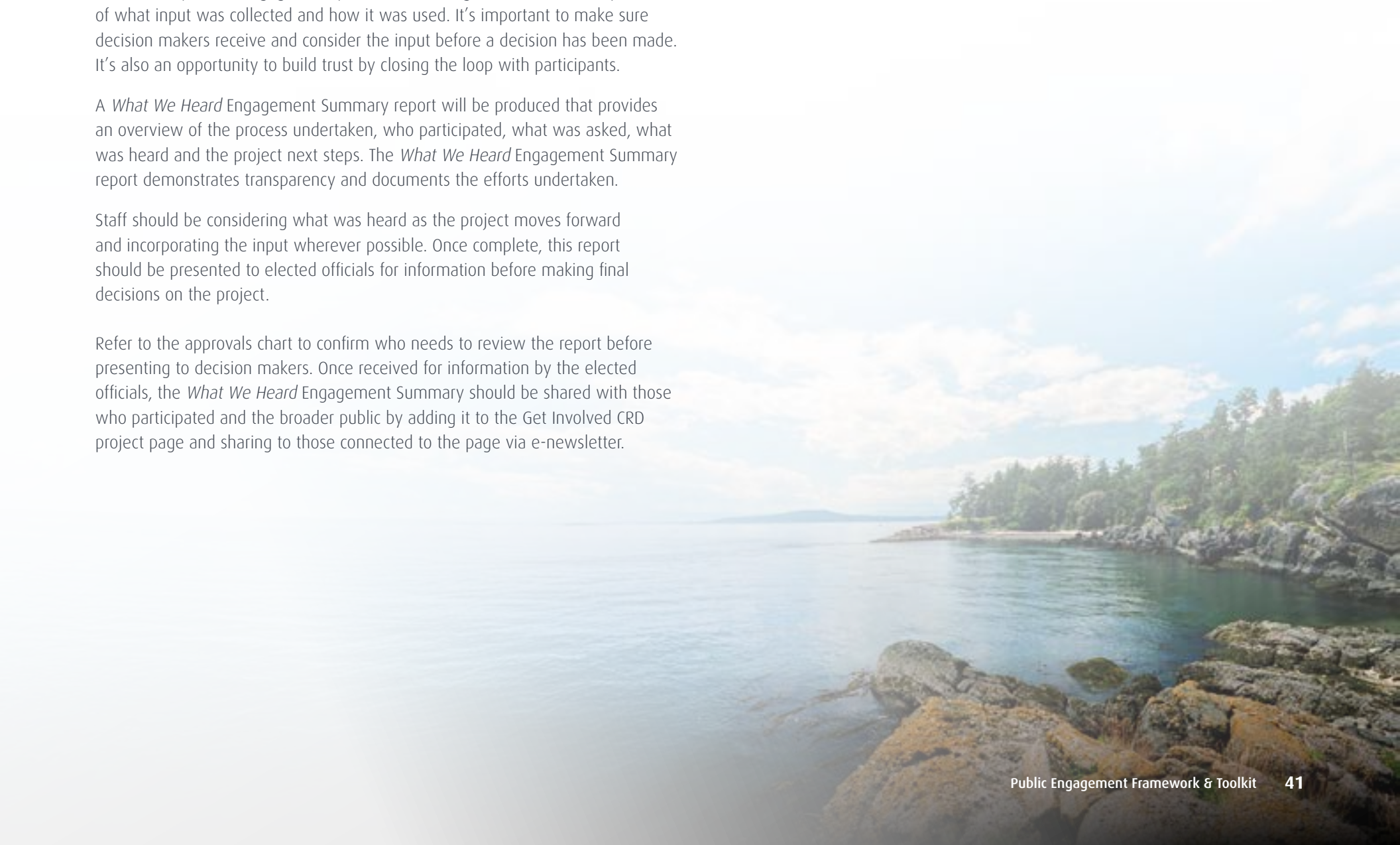
19. Reporting out on Public Engagement Efforts

The final step in the engagement process is ensuring that the community is aware of what input was collected and how it was used. It's important to make sure decision makers receive and consider the input before a decision has been made. It's also an opportunity to build trust by closing the loop with participants.

A *What We Heard* Engagement Summary report will be produced that provides an overview of the process undertaken, who participated, what was asked, what was heard and the project next steps. The *What We Heard* Engagement Summary report demonstrates transparency and documents the efforts undertaken.

Staff should be considering what was heard as the project moves forward and incorporating the input wherever possible. Once complete, this report should be presented to elected officials for information before making final decisions on the project.

Refer to the approvals chart to confirm who needs to review the report before presenting to decision makers. Once received for information by the elected officials, the *What We Heard* Engagement Summary should be shared with those who participated and the broader public by adding it to the Get Involved CRD project page and sharing to those connected to the page via e-newsletter.



20. What We Heard: Engagement Summary

The *What We Heard* Engagement Summary report should include:

1

Overview of the Project/Process and Objective for Engagement

- Key background
- Engagement objectives
- Strategic approach or principles applied

2

Outline the Process – steps to be undertaken in overall process and associated timeline

- Engagement opportunities should be evident through steps

3

Awareness and Engagement Activities Undertaken

- Describe how events and surveys were promoted – advertisements, social media, media release
- Outline number, dates, and locations of events and surveys
- Include photos of events and images of promotional tools used and/or media coverage

4

What We Heard

- Include photos of events and images of promotional tools used and/or media coverage
- Theme/analyze open-ended comments. Depending on volume, privacy considerations and preferences of decision-makers, at times all open-ended comments are included as an appendix for review. *Note: Open-ended comments can often unintentionally identify an individual. A detailed review of all comments must be completed.*

5

Who We Heard From

- Number of participants, relevant demographics (e.g. renter vs. owner, age, neighbourhood, previous participant, etc.)
- Which demographics were underrepresented comparatively to community composition

6

Next Steps

- Outline the next steps in the process and how input will be used/was used to inform the decision
- Note upcoming meetings or decision points and associated timeline
- Include web address for finding related or additional information

WWH REPORT AND PRESENTATION TEMPLATES

Evaluate

21. Feedback and Evaluation Forms

Participant Feedback

Participant feedback is helpful in understanding whether they received the information they needed and whether they found the process and experience accessible and meaningful.

Ask participants to share their feedback to help you improve future events and activities.

POST-EVENT FEEDBACK FORM

Staff Evaluation

Some questions to consider when evaluating your public engagement activities are:

- Did you meet, exceed, or satisfy the goals you had set out at the outset of the planning process?
- Was the issue clearly defined before starting?
- Did the engagement adhere to the core values of public engagement set out in this toolkit?
- Did you include potential participants in the design of your engagement activity?
- Were the appropriate interested people and groups identified?

- Did the identified interested people and groups participate?
- Were the tools and techniques appropriate?
- Were a variety of techniques used?
- Were there any unforeseen circumstances or constraints?
- Were individuals and interested people and groups given adequate opportunity to participate in all aspects of the process?
- Was the engagement inclusive? Did it meet the needs of those with disabilities or language barriers?
- Which voices were underrepresented?
- Was the received input relevant and valuable?
- Were all critical issues addressed?
- Did you effectively record and analyze the input received?
- Was the engagement completed within the set budget and timeline?
- Were participants made aware of how the engagement and their feedback could/would be used?
- Did the input inform the decision?
- What went well?
- Were participants generally satisfied with the process?
- What will you do differently next time?
- Do you have recommendations for further investigation or research?

Connect with the Manager, Website & Public Engagement to share lessons learned and any recommendations. This step is crucial to continuing to improve and adapt.

EVALUATION FORM

