Public Engagement Primer

The Diverse Set of Public Engagement Tools and Techniques Used in the CONNECT Region

Tool or Technique	Longer Description	Best Used For	Value in Meaningful "Engagement"	Value in Inclusion	Other Cautionaries	Cost and Ease Factors
Public Hearing	Legally-required, formal hearing before a governing board (City/Town/Village Council, County Board, Planning Commission etc) receive official comments on plans, proposals, etc. Information being commented upon will have been advertised and shared beforehand as legally required.	Meeting a legal requirement for a public hearing to hear concerns or comments from the public on a particular matter discussed by governing board..	Not high, as most key policy or programmatic decisions will have been made by the time the public hearing is called for	Does not typically draw members of traditionally-underrepresented groups (venue, tone, terminology, and concerns of dress and "fitting in" all are problematic). Not at all likely to draw refugees and non-English speakers due to natural fear of governmental organizations and real or perceived language barriers.	Depending on topic, may require security presence.	Inexpensive (advertising is the main cost) and easy (as it is usually done as a portion of a governing board meeting); all that is needed is a microphone and way of recording comments
Public "Meeting" (spoken input only)	Public gathering, usually in a large venue such as a school auditorium, to receive public comment. Information to be commented on may be made public beforehand, or may be presented at the meeting.	Very large gatherings on issues such as school reassignments, tax policy changes, etc., where people need an opportunity to "vent" as well as provide input or feedback. Not as useful for planning activities; better tools are available for those	Not as valuable as other means of engagement for receiving public input that will help to solve the problem, but provides the public with a much-needed opportunity to be heard	Depending on the topic, may or may not draw members of traditionally-underrepresented groups (will tend to draw activists). Not at all likely to draw refugees and non-English speakers for the reasons noted above.	Depending on topic, may require security presence. Several sessions likely will be required to ensure geographic participation, if the area is large.	Somewhat more expensive, if space must be rented and if security is deemed to be needed. Other costs involve staff time and the time of any group present to hear the comments. Relatively easy to implement.
Open House	Drop-in event with information displayed on foam boards, with or without opening presentation, and staff present to answer questions and "host" the event. Input is provided via survey form, either handwritten or computerized.	Sharing information about a project and obtaining input in an individually-paced, non-intrusive way. People review the information at their own pace, ask questions if they feel the need, and then complete the survey. Can be used for input or feedback.	Excellent for those who attend, as it provides an opportunity for education and input, and is self-paced. A very good means of obtaining "what" information; less good at uncovering the "why" behind the "what." Information provided is not influenced by other participants. Also can yield good community response (feeling of being included in the problem and how it should be addressed).	Those who attend are more likely to be the "usual suspects;" not a good avenue for traditionally-underrepresented groups (dress and "fitting in" are challenging, and this also demands good language skills by participants, so is difficult for anyone with reading challenges). Will work for non-English speakers only if a "mirror" session is offered with native language speakers present to staff.	Not for those who like high energy level activities, unless it is very well-attended. Scheduling can be a challenge, and several sessions likely will be required.	Yet more expensive, with staff time committed for planning, presence, logistics, and materials development, and materials cost can be relatively high. Requires considerable coordination, promotion, and advertising, especially if the topic is not "hot."
Interview	One-on-one discussion with an individual whose views are being sought on an issue	Obtaining in-depth input, ideas, consultation, or feedback from an individual whose views are particularly valuable, because they are considered expert, or because they represent a particular perspective being sought	Excellent for the participant, and can serve the particular issue well if sufficient interviews are done and all perspectives are represented. Individual interviewees may feel either flattered or put on the spot, which may color their responses.	Can be used for traditionally-underrepresented groups, if the interviewer is a member of the group, or a native language speaker if the interviewee is non-English-speaking, and if the interviewee is an activist. It may not be as good as group processes, however, because there will likely be more of a "put on the spot" feeling than one of flattery, and the interviewee may be	It will take a lot of individual interviews to get a sense of any kind of "public sentiment," and care must be taken that interviewees are concerned about the interview's agenda, and not their own.	Relatively low-cost except in terms of staff time, and in time spent scheduling interviews.

				very nervous. Would not suggest for refugees, for example.		
Small or "Focus" Group	Any "small" (as in 8-10) group of people gathered specifically for the purpose of engagement around a topic. Information to be discussed usually needs to be provided at the opening of the meeting.	Generating ideas and discussion which will lead to the "why" behind responses, as well as the responses themselves; can also be used for idea generation, input, feedback, and problem-solving.	Excellent for those who attend, and provides the rationale for responses more comprehensively than surveys. Facilitators can manage the setting, number of participants, and level of pre-engagement discussion to create an open atmosphere for discussion, even if the participants do not know each other. Results will reflect the group dynamics and consensus of the group, but some individual responses can be captured, if needed, with keypad polling or a quick survey form, or even on flip charts.	Very good for engaging traditionally-underrepresented groups, especially if it is done using demographically homogeneous groups with materials and facilitators who speak the language (if it is a non-English-speaking group). Venues at churches or other trusted places, such as homes, work best, especially if the group can be offered in a way that minimizes travel and child care needs. The group setting often encourages more conversation that would happen in other forms of engagement; individuals are not "on the spot" and as other group members talk, with good facilitation, all group members eventually open up. Will require a large number of homogeneous groups to achieve representation of all the demographics in an area.	Responses will be impacted by the group dynamic, but will be more deeply qualitative and story-based than survey results. Diverse groups can also be used, depending on the issue at hand, but will likely attract more activist members of traditionally-underrepresented groups.	If volunteer facilitators are used, will be less-expensive than if paid staff are used, but care must be taken to ensure that the facilitators are skilled (and it's worth paying for). Also requires staff time to identify and work with partners, who typically are remunerated, and to schedule events. Translating also needed if groups don't speak English.
Intact Small Group	A small group that meets regularly and knows each other, and devotes a meeting or part of a meeting to a public engagement activity. Information needs to be provided at meeting opening, but can sometimes be sent ahead.	Generating ideas, discussion, "whats and whys," as well as input and feedback.	Excellent for those who attend, and again provides rationale. Participants will know each other so discussion will flow freely. Best if it is a regularly-scheduled meeting devoted fully to the topic.	Very good for engaging traditionally-underrepresented groups, again best with demographically homogeneous groups or people who know each other or work together, even if they are not demographically homogeneous. Requires native language facilitation if the group are not English speakers.	Time constraints can be an issue if only a part of the meeting is dedicated to the topic, but a special meeting to discuss the topic may negatively impact attendance. Responses reflect group interaction.	Again, time involved in scheduling, partner work, translating, etc. Also may require borrowing or renting technology (if you are using visuals and have multiple groups going).
Intact Meeting	A larger group that meets regularly (such as Rotary or a professional association) and devotes part of a meeting to a public engagement activity	Obtaining input or feedback from a large number of people who are connected to each other and generally civic-minded, without requiring them to go to another meeting. Not as good for generating ideas.	Good for those who attend, but will not be as in-depth because there will never be enough time for discussion. Keypad polling is a good option for these groups, and can be used for input or feedback.	Can work for traditionally-underrepresented groups if that is the group who is meeting (church conference, professional or advocacy organization, etc.). Presenters/facilitators must have language fluency if it is a non-English-speaking group, and any visuals must be translated, including polling slides if they are used.	Time constraints are always an issue, and technology may be, but it is always best to get input before people leave the meeting; you are typically dealing with busy people who won't have time to do it later.	Again, time involved in scheduling, partner work, translating, etc. Also may require borrowing or renting technology (if you are doing keypad polling).
Self-Led Group	A group that may or may not meet regularly, but is called together by a "friend/convener" to provide engagement on a topic, using a "meeting in a box" that includes background information, a discussion guide, and means of capturing group input	Generating ideas, obtaining input or feedback, getting at "whys" as well as "whats," especially if the conveners are somewhat familiar with the issue and have an understanding of the importance of capturing input objectively. Best if each respondent receives and turns in their own input forms.	Good to very good for those who attend, depending on the skill of the convener. Best if conveners can receive training or orientation to the process, or have some facilitation skills from previous experience.	Can work well for traditionally-underrepresented groups, and again, best if conveners receive some training. Materials must be translated into the languages being used.	Since conveners are all volunteers, they must be reminded to actually convene the groups they have committed to, and then to turn in the materials. This is harder to achieve than it sounds.	Involves high translating and copying costs, but otherwise very low-cost.
Hands-On	Any type of engagement that	Generating ideas, gaining input, or	Excellent for any type of planning	Excellent for traditionally-underrepresented	A wide range of hands-on	Probably the most expensive

Experience	involves people in providing ideas in a hands-on way, or in providing feedback based on something they experience as a part of the engagement process. Information can be provided in advance of the process, as it begins, and during the process, as participants generate questions.	providing feedback, and many types of problem-solving activities. Hands-on tools provide additional information and opportunity to provide non-verbal input (draw lines on a map, circle areas of interest, stack chips, draw or make something out of clay) that is easily understandable, fun to do, and feels more "real" than words sometimes do. Engagement can also involve experiential learning about an issue, such as having participants use glasses that mimic cataracts before talking about aging issues.	issues, or other issues where use of space is in question. These activities tap different areas of the brain, and allow people to become more deeply engaged in the "shaping" of space and the aesthetics associated with it. Experiential learning exercises followed by engagement around problem-solving also can build understanding at a level beyond other types of engagement, such as the cataract example sensitizing participants to aging.	groups, because it typically levels the playing field by reducing the use of technical terminology, reading needs, and even minimizes social differences (although appearance may still be somewhat of a concern). Also excellent for non-English-speakers, provided that any written materials are translated and fluent facilitators are used, and has the added benefit of being fun.	tools exist, from chip games to computer simulations to simple drawing or manipulation exercises. Keypad polling and visual preference polls, while not fully hands-on, also may be useful in increasing the depth of understanding, the quality of feedback, and the sense of energy of the event.	option, but one of the most productive, especially for planning. Can range from low-tech (map and markers) which still gets excellent results, to high-tech (chips with a computer interface that generates predicted outcomes based on immediate modeling), and cost varies accordingly. But for most planning, map and markers and sticky-notes are a realistic, great option!
Written/Paper Survey	Traditional survey instrument that can be set up for computer scanning or hand-tallying. Information is usually either not provided, or is provided beforehand.	Obtains input or feedback, but difficult to reach a level of depth, without open-ended questions that must be themed for qualitative results rather than tallied for quantitative results. Easiest to use if quantitative results only are sought, but can provide qualitative input.	Best/easiest to use for quantitative input, but can also provide qualitative information. Level of engagement will vary; not a "high-energy" activity.	Works adequately if translated for non-English-speaking groups, but not generally a good method for those with language difficulties. Does permit persons from traditionally-underrepresented groups to express opinions freely, so long as literacy issues are not a challenge with the group being engaged.	Because it is typically not a high-energy activity, and typically not done in a group setting, has a hard time generating interest. Best if used along with some other form of engagement.	Surveys in general, except for contracted telephone surveys, tend to be less costly than types of engagement that offer personal interaction.
Survey Monkey or Similar Tool	Traditional survey instrument with an on-line twist and expanded capability. Information can be provided with each question, or in a short intro document.	Obtains input or feedback and can generate ideas, by virtue of capacity for inclusion of photos, videos, etc. into survey tool. Best and easiest to use for quantitative input, but can also be themed for qualitative input if open text questions are included.	Best/easiest to use for quantitative input, but can also provide qualitative information. Level of engagement will vary, but feels more engaging than paper surveys because it feels more interactive.	Works adequately if translated for non-English-speaking groups, but not generally a good method for those with language difficulties. Does permit persons from traditionally-underrepresented groups to express opinions freely, so long as literacy issues are not a challenge with the group being engaged. Access to computers also can be an issue.	Requires a lot of advertising and sending of links to get good numbers, but can provide excellent input from those interested if the right audiences can be tapped. Best for situations where the desired audience can be easily reached and reminded to participate.	Surveys in general, except for contracted telephone surveys, tend to be less costly than types of engagement that offer personal interaction.
Telephone Survey	Traditional survey method. Information is usually not provided; survey is based on opinions about topics about which the interviewee is expected to have an opinion	Obtains input or feedback, but difficult to reach a level of depth. Best for quantitative input.	Provides personal contact if not computerized, but not a high level of engagement.	Works adequately if translated for non-English-speaking groups.	Increasingly unpopular with the public, so hard to get good participation, even if use of a stratified random sample permits drawing conclusions from a relatively small number of respondents.	Surveys in general, except for contracted telephone surveys, tend to be less costly than types of engagement that offer personal interaction. With telephone surveys, it can be expensive to get sufficient responses, because you are paying someone to make calls and frequently get hung-up-on.
On-Line or Social Media Engagement or Gaming	Interactive, web-based engagement tool that can include interactive maps, participant capacity to "draw" responses, ability to review	Participant input on a well-defined set of proposals or options that can be displayed as maps, photos, and that benefit from high levels of interactivity. Some "serious games"	Gives individual responses and can produce huge numbers of responses, if the exercise is fun, feels game-like, and goes viral. Response inputs are somewhat	Works adequately if translated for non-English-speaking groups, and if computer access is not a problem. For CONNECT, did not work as well as small groups, and worked best if it was done as part of a small	Can be expensive to set up, but with proper advertising, can generate large numbers. Needs a great deal of social networking and promotion	Costs can run up to $25,000 for set-up, not including any advertising.

	results of responses and adjust them to produce desired results, prioritization and instant feedback capacity. Typically contains the information to support decision-making in the tool itself, or as links.	also are being developed that involve multiple players in addressing community issues or needs, or providing different perspectives on how communities can solve problems. Input is typically limited to multiple choice, prioritization, and map inputs, with some open text comments.	limited and tend to be more quantitative than qualitative, although qualitative comments can be provided in comment boxes.	group, and among younger demographics.	to drive people to the site.	
Leadership Academy	A "class" that develops civic understanding and leadership capacity for residents of an area, that may also lead to development of an alumni group that can be a sounding board for neighborhood or community-wide issues. Information is shared during "class time" which usually lasts for several weeks or months, and may be followed up by mailings to an alumni mailing list.	Ongoing community engagement and problem-solving. A "Leadership Academy" can produce a "go-to" group of current and potential future leaders who are interested in and willing to become involved in helping the organization or local government with community engagement, outreach, and problem-solving. While this group can be tapped to assist with individual issues, the "leadership academy" itself is more educational than engagement-oriented.	Very high value in terms of creating a more informed public, and most people are very pleased with their experience and continue to be active in civic affairs.	Potential for very high value, especially if done in partnership with an organization or organizations that regularly work with the members of traditionally-underrepresented groups being included.	If reaching out to non-English-language groups, need to be aware of translation issues.	Not cheap, but an investment in the community's (or region's, when done at the regional scale) future
Advisory Group	An ad-hoc or standing "committee" composed of community stakeholders and members of the public to advise on a particular project or aspect of an organization's work, such as a Parks and Recreation Advisory Committee, or an Advisory or Steering Committee for a land use planning process	In-depth community engagement and problem-solving, and connection to the broader community in complex planning processes or with ongoing operations. Members typically represent segments of the community and are expected to represent those views, and communicate information back to the broader community. The process is typically mutually educational and engaging.	Very high value to a small number of participants, and larger value only if the participants are oriented to see and perform their role as ambassadors to the groups they should be representing. Very valuable to communities, as makes adoption of the final results much easier.	Potential for high value, but the challenges of language, venue, dress, and "fitting in" can be present. Better if activists are involved and then encouraged to help others become involved.	If reaching out to non-English-language groups, need to be aware of translation issues.	A relatively low-cost way to get excellent input that makes final products more acceptable, but cannot work as the only means of public engagement on most issues.