



# Public Engagement Guide

# WHY WE ENGAGE

Each week, the Cowichan Valley Regional District (CVRD) makes decisions that affect the lives of tens of thousands of people who live, work and play in the Cowichan region. That's why public engagement is such a critical part of the decision-making process.

When we take the time to invite the insights, ideas, and aspirations of our citizens, we ensure that the outcomes of our decisions reflect the vision, values, and needs of the whole community. Meaningful engagement produces a deeper understanding of the issues, allows different perspectives to be heard, builds credibility and trust, and fosters confidence in the final decision. On top of this, public engagement benefits society at large by encouraging future involvement in civic issues.

Public or community engagement can be any kind of interaction where information and opinions are shared and used in the decision-making process. Some traditional examples include open houses, surveys, citizen committees and advisory panels, task forces, and public meetings, workshops, or a table at a community event. But in order to attract the participation of a broader range of demographics, decision-makers are increasingly turning to highly visual and interactive web-based tools, where involvement can be maximized through convenience. The objective of engagement is not necessarily to reach consensus, but to form better decisions and develop more informed policy by building greater understanding of the issues—for the community and the decision makers.

## ***Through public engagement, we can:***

- allow community members and decision-makers to hear a variety of perspectives
- manage differences, establish direction for moving forward on complex issues, and build understanding regarding trade-offs
- foster confidence and trust in local government
- build better neighbourhoods and stronger communities through common understanding and shared aspirations
- correct misinformation, and address hidden obstacles or unknown consequences early in the process

As the Cowichan region changes, it is more important than ever to ensure our decision-making process is inclusive, meaningful, accountable, and responsive to the community's needs.

***This framework has been created to ensure that these principles are consistently applied by setting an organization-wide best practice approach to public engagement.***

Along with the Project Planning Worksheet, this guide will help staff to design, implement, and evaluate an effective strategy for community outreach.

Projects at the CVRD range from straightforward to highly complex, and while this framework and workbook will promote consistent best practice, the CVRD Communications & Engagement team will also continue to work with staff to help develop the best approach for engagement in all circumstances.



## The Core Values of Public Participation

Public participation must . . .

1. be based on the belief that those who are affected by a decision have a right to be involved in the decision-making process
2. include the promise that the public's contribution will influence the decision
3. promote sustainable decisions by recognizing and communicating the needs and interests of all participants, including decision makers
4. seek out and facilitate the involvement of those potentially affected by or interested in a decision
5. seek input from participants in designing how they participate
6. provide participants with the information they need to participate in a meaningful way
7. communicate to participants how their input affected the decision

*Adapted and used with permission from the International Association for Public Participation (IAP2 Federation).*

# The Guiding Principles of Public Engagement

*To support effective decision making and to foster community trust, engagement processes in the Cowichan region must follow these key principles:*



## INCLUSIVE & ACCESSIBLE:

Everyone who could potentially be affected by a decision must be afforded an opportunity to provide input.

***Successfully adopting these principles means that we:***

- Engage with people where they live, whether online or in-person.
- Proactively seek the involvement of a wider range of voices; for instance, parents of young children, newcomers, and young people.
- Identify any barriers to participation and ensure they are removed.



## RESPECTFUL & RESPONSIVE:

The engagement process must be thoughtful and relevant, and must value the input and interests of participants.

***Successfully adopting these principles means that we:***

- Initiate early, well before decisions are to be considered, to give participants time to make informed choices and meaningful contributions.
- Plan for appropriate budget and other resources.
- Provide a process that is transparent, open, and adaptive to community needs and interests.
- Record and share the views and ideas expressed, as well as how they affected the outcome.

# 3



## CLEAR & TRANSPARENT:

Information about the project and the engagement process itself must be easy to understand. Communication must be open, honest, thorough, and frequent.

***Successfully adopting these principles means that we:***

- Accurately communicate the level of involvement and influence participants can expect to have.
- Provide clear, concise, objective information in plain language that is free from technical jargon and promotes greater understanding of the project.
- Communicate constraints and contextual information that deepens understanding of the issues.
- Widely communicate regular updates, including information about the schedule, milestones, and opportunities for involvement.
- Create material for and use multiple communication channels to achieve maximum reach in the community.
- Report back to participants on the views and ideas that were expressed and how they affected the outcome.

# 4



## CONTINUOUS IMPROVEMENT:

Each process is evaluated, so that lessons learned can be captured and applied to future engagements.

***Successfully adopting this principle means that we:***

- Evaluate completed engagement processes against guiding principles and best practices to measure success.
- Ask participants for feedback on their experience and on the process.
- Foster creativity, seek out innovative methods, and look for ways to continually improve.
- Keep up to date on technological tools and communication platforms to reach the whole community.
- Commit to training for CVRD staff so they are up to date on public engagement best practices.



# The Five Levels of Public Engagement

While many project and policy decisions benefit from—or even require—input from the community, there is no one size fits all approach.

For example, if a decision has already been made, engagement should be strictly limited to keeping the public informed, since an invitation to provide feedback could be misinterpreted as an opportunity to influence the outcome and would ultimately generate mistrust.

These Five Levels of Public Engagement, adapted from the International Association of Public Participation's (IAP2 Federation) Spectrum of Public Participation, represent globally-accepted best practice standards for public engagement.

Before you plan your engagement process, consider these six levels and ask yourself two questions:

- 1. Which strategy is appropriate for the decision that needs to be made?**
- 2. Which promise are you sure you will be able to keep?**



## Inform

### Strategy:

CVRD provides citizens and stakeholders with balanced and objective information to assist them in understanding the problem, alternatives, opportunities, and solutions.

### Promise:

"We will keep you informed. We will provide information that is timely, accurate, balanced, objective, and easily understood. We will respond to questions for clarification and direct you to sources of additional information."

### Example:

- Website
- Advertising
- Signage
- Fact sheet



## Consult

### Strategy:

CVRD consults with citizens and stakeholders to ensure issues and concerns are understood, and to obtain feedback on analysis and/or decisions.

### Promise:

"We will keep you informed, and listen to and acknowledge your concerns and aspirations in developing final solutions, and we will report back to you on how your input influenced the decision."

### Example:

- Survey
- Focus Group
- Public meeting



## Involve

### Strategy:

CVRD works directly with citizens and stakeholders throughout the process to ensure that public concerns and aspirations are consistently understood and considered.

### Promise:

"We will work with you to ensure your concerns and aspirations are directly reflected in the alternatives developed, and we will report back on how your input influenced the decision."

### Example:

- Workshop
- Design charette



## Collaborate

### Strategy:

CVRD partners with the public in each aspect of the decision-making process, including the development of alternatives and the identification of the preferred solution.

### Promise:

"We will look to you for advice and innovation in formulating solutions, and we will incorporate your recommendations into the decisions to the maximum extent possible."

### Example:

- Deliberative Dialogue
- Workshop



## Empower

### Strategy:

CVRD places the final decision-making power in the hands of the public.

### Promise:

"We will implement what you decide."

### Example:

- Alternative Approval Process
- Assent Voting/Referendum
- Election

# GETTING STARTED

## Planning and Implementing a Public Engagement Strategy

There are eight critical steps to developing an effective public engagement strategy. For detailed information on what questions to ask and actions to take, see the Project Planning Worksheet on Page 16.

### PUBLIC ENGAGEMENT PROCESS

#### Prepare

- 1 → Assess the need for public engagement
- 2 → Determine your objectives
- 3 → Identify and assess your stakeholders

#### Design

- 4 → Determine the appropriate tactics
- 5 → Plan your story
- 6 → Create your final action plan

#### Implement

- 7 → Tell your story, invite response, and report back

#### Evaluate

- 8 → Share your results and evaluate your performance

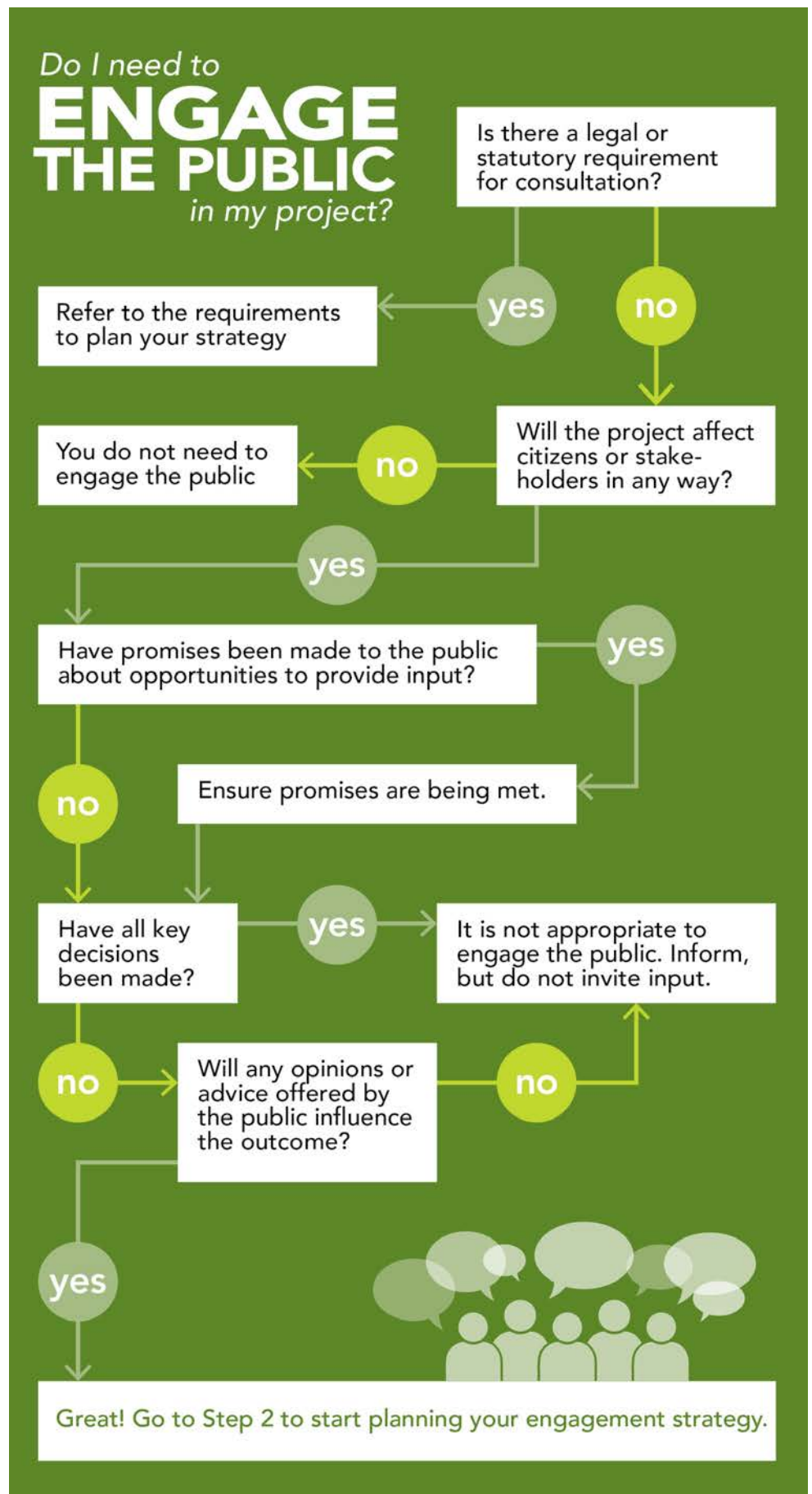


## Prepare 1

### ASSESS THE NEED FOR PUBLIC ENGAGEMENT

The first step is to determine if public engagement is required.

If the project does not affect the public or there is no opportunity to influence the decision, engagement is likely not necessary. For example, in cases where a project is required by regulation, mandated by senior government, or when public safety is at stake, your only duty is to keep the public informed.



## Prepare 2

### DETERMINE YOUR OBJECTIVES

Before you identify or approach your audiences, it's important to fully understand what you want to achieve by engaging the public.

***For example, do you want to:***

- Provide the public with accurate information?
- Hear their concerns?
- Help create a shared vision?
- Strengthen relationships with the community?

By clearly defining your goals—and there may be several—you are more likely to achieve them. Consider some of the common goals for engagement that may apply to your project.



### Common Objectives for an Engagement Strategy

- Providing timely, accurate, balanced, and easily understood information
- Listening and learning about views, concerns, and interests
- Obtaining feedback on options
- Creating a shared vision
- Delegating decision making
- Bringing attention to an important issue
- Identifying areas of conflict so you can build understanding of the trade-offs
- Identifying a broader range of options
- Managing stakeholder expectations
- Informing citizens about plans and decisions that will affect their lives
- Mitigating project impacts on the public
- Helping the public understand the complexities of an issue
- Reducing or avoiding delays

## Prepare 3

### IDENTIFY AND ASSESS YOUR STAKEHOLDERS

*Who might be affected by the project or decision?*

*How will you assess how their input might affect the outcome?*

While the public may or may not be affected by a project or decision, stakeholders are people, groups, institutions, or even other government bodies that are in some way impacted by a project.

Decide who your stakeholders are, and how they might be impacted by the outcome. Then decide how they could influence the decision, and how best to communicate with them to help them become involved.

This is also a good time to list other factors that might affect or be affected by your project, such as the environment, transportation impacts, or other projects in the Cowichan region or nearby communities.



### Potential Stakeholders

#### *Individuals:*

- Residents
- Indigenous peoples
- Landowners
- Visitors

#### *Business and economic groups:*

- Business owners
- Employees and employee groups
- Industry Groups (e.g. Waterfront)
- Chamber of Commerce
- Merchant Associations

#### *Special interest groups:*

- Environmental organizations
- Multicultural groups
- Youth/Student groups
- Arts organizations
- Sports and leisure groups
- Service agencies and boards

- Religious organizations
- Neighbourhood associations
- Organizations representing persons with disabilities

#### *Government bodies:*

- First Nations
- Government of Canada
- Province of BC
- School District No. 79 (Cowichan Valley)
- Municipality of North Cowichan
- City of Duncan
- Town of Ladysmith
- Town of Lake Cowichan
- Police, Coast Guard
- Vancouver Island Health Authority



## Design 4

### DETERMINE THE APPROPRIATE TACTICS

Now you can begin to plan your engagement process. For each stakeholder group, list the likely key concerns or questions, and their expected level of involvement. Consult the Five Levels of Public Engagement chart on page 6 to determine which level of promise is appropriate for your project and to help choose the strategies and tactics that will help you fulfil that promise. Be specific for each action; list when it will happen, how it will happen, and who is responsible.

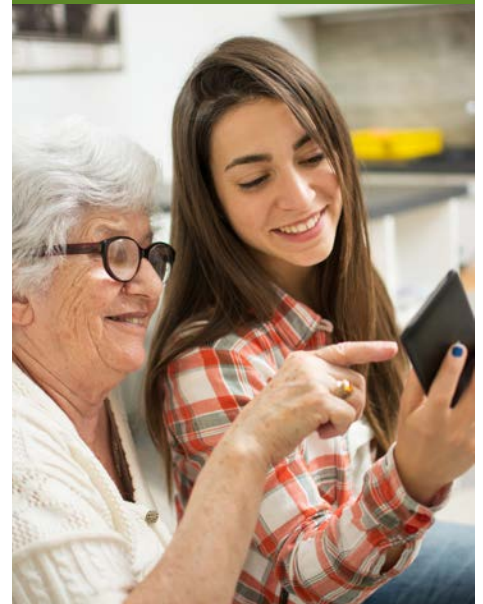
## Design 5

### PLAN YOUR STORY

The goal here is to build knowledge and understanding around your project so that the public can offer meaningful feedback. Your story should offer the facts in a clear, engaging way that is free of jargon and consistent across all the platforms you have chosen.

***Work closely with the Communications & Engagement team to help develop your story:***

- Offer background and contextual information on the project
- Outline the questions that need to be answered
- Let participants know how they can provide feedback
- Tell them how their input might affect the outcome



### Storytelling Tools and Platforms

The tools you use to convey your project's story will depend on the level of engagement and the size of the audience you want to reach. Some common communications tools are social media, videos, photos, backgrounders and fact sheets, advertising, websites and story boards, but there is no one-size-fits-all approach.

The CVRD Communications & Engagement team can help you determine the best tools for your project and budget, whether you are building awareness and understanding for the project, inviting the public to become involved, or reporting results and outcomes to participants.

### CREATE YOUR FINAL ACTION PLAN

How you reach your stakeholders will vary with each project, but the goal is always the same: to raise awareness and to let the community know that their involvement is invited and important. Using the groundwork you have completed in the previous steps, create your action plan.



### What to Communicate About Your Project

#### *Background Information*

This outlines the parameters of the project and gives the public the details they need to offer informed feedback.

***You'll need to answer the following questions to get started:***

- What is the project?
- What are we trying to address with this project?
- Where is the project located?
- Why do we need it?
- Who is affected?
- What are the options?
- What are the constraints or trade-offs?
- How does it tie in or compete with other projects in the community?
- How does it tie in with CVRD or other government plans?
- What specific questions do you want participants to answer?

#### *Contextual Information*

This provides insight into the overall engagement process, and informs participants about the impact their input will have in the decision-making process.

***Information to provide includes:***

- a summary of the overall engagement process
- how feedback will be collected
- a timeline of events and milestones for the engagement process
- who will be making the ultimate decision(s)
- what effect their input will have



## Implement 7

### TELL YOUR STORY, INVITE RESPONSE, AND REPORT BACK

Now it is time to actually engage the public. Be open to all perspectives as you meet with the community, and straightforward in answering their questions. Maintain your lines of communication throughout the project by updating the participants regularly, providing next steps, and reporting back on how their input was used. At each step, make sure to thank participants for their involvement.



#### Our Editorial Styleguide requires that your communications are:

1. **Clear:** Present the information in plain language and at an easy-to-understand, Grade 6 reading level.\*
2. **Concise:** Use brief, bulleted lists for quick understanding instead of wordy paragraphs.
3. **Concrete:** Convey factual information in a straightforward manner. Avoid speculation, and take care to remove any bias that may be seen to taint the input.
4. **Correct:** Fact-check your copy carefully to ensure the information is accurate.
5. **Coherent:** Eliminate wordiness and technical jargon.
6. **Complete:** Check with people in other departments to ensure you have not missed key information.
7. **Courteous:** Be respectful of the time and effort participants are giving. All points of view are valuable.

*\*Be sure to follow the CVRD Editorial Styleguide*

## Implement 8

### SHARE YOUR RESULTS AND EVALUATE YOUR PERFORMANCE

Before you launch your engagement strategy, establish milestones and metrics that will serve as indicators of success, and identify the tools you will use to gather feedback.

Each stage of your project should be documented and evaluated, both from the perspective of your team, and based on feedback from participants. Sharing these results with others will help everyone benefit from your lessons learned.



### Five Steps to a Successful Evaluation

1. Record the results of the engagement process, including participant feedback on the project.
2. Document your methodology and process, and evaluate the success of your engagement against the guiding principles outlined on page 4 and 5.
3. Share the public's feedback with colleagues and other departments who may work on future phases of the project.
4. Report back the results to the public on how their feedback affected the outcome.
5. Share your own evaluation of your engagement process, for the purposes of continuous learning.

# PROJECT PLANNING WORKSHEET

Use these questions and frameworks to help design an engagement strategy for your next civic project.

## Prepare

1. What is the project (define in some detail)?

2. Who is the project lead?

3. Which other internal departments and individuals are involved?

4. What are our objectives?

5. What questions do we need answered in order to proceed with the project/decision?

6. Who are the audiences and stakeholders?

7. What are the potential impacts of the project to those audiences and stakeholders?

8. What information do audiences and stakeholders require?

9. How might audiences and stakeholders influence the decision?

10. Why do we need to engage?

11. What are the risks of NOT engaging?

12. How broadly should we engage?

## Check-in with Communications & Engagement

### Design

13. What influence or impact will our participants have on the decisions?\*(  
(Refer to the Five Levels of Public Engagement)

*\*Important note: If stakeholders have no opportunity to influence the decision or outcome with their participation, do not continue planning an engagement process. In this case, the appropriate action is "Inform." Please contact the Communications & Engagement team for further assistance.*



14. What specific engagement tactics will we use?

15. How long will the process be? Is it a simple question we need to answer, or is it a major item, requiring ongoing/multiple engagements and decision points through the Board?

16. What platforms are best suited to telling this project's story?

17. How will I invite participation?

18. How will I report the findings - to participants, to the Board?

Check-in with Communications & Engagement

Implement

19. Now it is time to execute your plan, tell your story and invite response.

Check-in with Communications & Engagement  
for assistance with this phase

Evaluate

20. Did we achieve our objectives? Why or why not?

☐ Yes ☐ No

21. **Diversity** – Did we engage a wide range of voices? How?

☐ Yes ☐ No

**22. Accessibility** – Did we ensure barriers to participation were removed? How?

☐ Yes ☐ No

**23. Inclusion** – Were all relevant stakeholders identified and included?

☐ Yes ☐ No

**24. Relevancy** – Were the materials and questions provided meaningful and relevant to participants?

☐ Yes ☐ No

**25. Responsiveness** – How did the public engagement team respond to participant questions? Did the team follow up with participants with results?

☐ Yes ☐ No

**26. Respect** – Was the process respectful of participants' time and input? How?

☐ Yes ☐ No

**27. Communication** – Did the communication materials provide clear, objective, and helpful information to participants at appropriate phases of the project?

☐ Yes ☐ No

**28. Transparency** – Were the levels of involvement and influence clearly communicated with participants? Did we report back results and updates to participants?

☐ Yes ☐ No

**29.** Overall comments regarding the effectiveness of the engagement.

30. Was the process effective? Why or why not?

31. What would you do differently next time?

Send your completed evaluation form, along with all participant feedback forms, to the Communications & Engagement team once your process is complete.





175 Ingram Street  
Duncan, BC  
V9L 1N8

250.746.2500  
[cvrd.bc.ca](http://cvrd.bc.ca)



This guide was created by the District of North Vancouver  
and provided for use to the Cowichan Valley Regional District.