



Public Engagement Guide

WHY WE ENGAGE

The Regional District of Okanagan-Similkameen (RDOS) Board of Directors makes decisions that affect the lives of people who live, work, and play in the region. That's why public engagement is such a critical part of the decision-making process.

When the RDOS takes time to invite the insights, ideas, and aspirations of citizens, it ensures the outcomes of decisions reflect the vision, values, and needs of the region.

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.

Public engagement also encourages 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 house and public events, surveys, citizen committees and advisory panels, workshops, or attending other community events such as a farmers' market.

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.

This can be done by fostering a better understanding of issues within the community and among decision-makers.

Engagement notes:

- ◆ The level of engagement increases with the level of impact to citizens.
- ◆ Engagement should always be open, transparent, balanced, inclusive, and respectful.
- ◆ Sufficient time should be provided for participation a variety of opportunities, including Indigenous involvement and consultation.
- ◆ Participants should understand their roles, responsibilities, and authority.
- ◆ Leverage internal resources and tools such as RDOS venues, to minimize costs.
- ◆ Continually improve the engagement process.

Public engagement 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.

May 4, 2023

As the RDOS evolves, it is more important than ever to ensure the decision-making process is inclusive, meaningful, accountable, and responsive to community needs.

This framework has been created to ensure 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 **design, implement, and evaluate** an effective strategy for community outreach.

RDOS projects and initiatives range from straightforward to highly complex.

This framework and workbook will promote consistent best practices.

RDOS Communications staff will continue to work with other departments to develop the best approach for engagement in all circumstances.



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 public feedback will influence decisions.
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 information they need to participate in a meaningful way.
7. Communicate with participants about how their input affected a decision.

Elements 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 at the Regional District of Okanagan-Similkameen must follow these key principles:

1



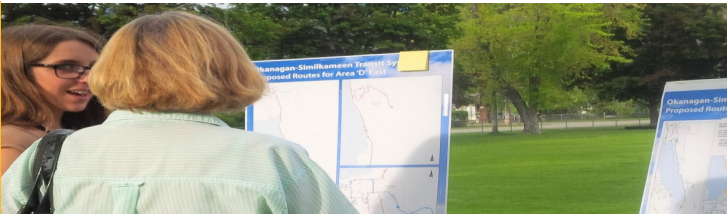
INCLUSIVE & ACCESSIBLE:

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

Successfully adopting these principles means the RDOS will:

- ◆ Engage with people where they live, online and in-person.
- ◆ Proactively seek the involvement of a wide range of voices, including seniors, children, youth, parents of young children, and newcomers.
- ◆ Identify barriers to participation and ensure they are addressed.

2



RESPECTFUL & RESPONSIVE:

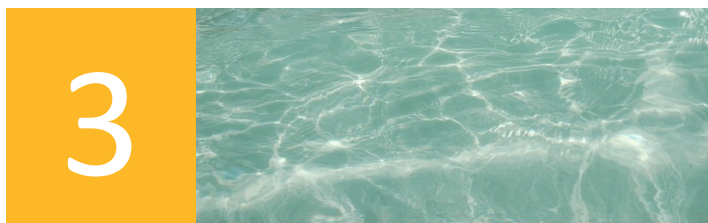
The engagement process must be thoughtful and relevant, and must value the input and interests of participants.

Successfully adopting these principles means the RDOS will:

- ◆ Initiate early, well before decisions are to be considered, to give participants time to make informed choices and offer 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.

The Guiding Principles of Public Engagement

To support effective decision-making and to foster community trust, engagement processes at the Regional District of Okanagan-Similkameen must follow these key principles:



CLEAR & TRANSPARENT:

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

Successfully adopting these principles means the RDOS will:

- ◆ 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 better understanding of the project.
- ◆ Communicate constraints and contextual information that improves understanding of the issues.
- ◆ Widely communicate regular updates, including information about the schedule, milestones, and opportunities for involvement.
- ◆ Create communications material and use multiple channels to achieve maximum reach in the community.
- ◆ Report back to participants on the views, ideas, and feedback that was received and how it affected the outcome.



CONTINUOUS IMPROVEMENT:

Each process is evaluated to ensure lessons learned can be captured and applied to future engagements.

Successfully adopting this principle means the RDOS will:

- ◆ Evaluate completed engagement projects against guiding principles and best practices to measure success.
- ◆ Ask participants for feedback on the process.
- ◆ Foster creativity, seek 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 RDOS staff to provide current information about 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. In this scenario, an invitation to provide feedback could be misinterpreted as an opportunity to influence the outcome and could generate mistrust.

Level 1



Inform

Strategy:

In **level 1** of engagement, the RDOS provides balanced and objective information to help citizens understand the issue, alternatives, opportunities, and solutions.

This type of engagement does not require input from the public.

Type of Engagement:

- RDOS website
- RDOS Regional Connections
- Notice boards
- Information release
- Fact sheet
- Advertising

Such as:

- Bi-weekly advertisement

Level 2



Consult/Feedback

Strategy:

In **level 2** of engagement, the public and the RDOS listen to each other's views, plans, concerns, and expectations.

This will encourage feedback and ensure issues and concerns are understood.

Discussions and presentations often take place during online or in-person public meetings, surveys, or workshops.

Type of Engagement:

- In-person public meeting
- Survey
- RDOS Regional Connections

Such as:

- Survey

These five levels of public engagement, adapted from the International Association of Public Participation (IAP2 Federation) Spectrum of Public Participation, represent globally-accepted best practice standards for public engagement. Before planning a engagement process, consider these six levels and ask two questions:

1. Which strategy is appropriate for the decision that needs to be made?

It's important to note, all public engagement requires different levels of commitment.

Level 3



Involve/Input

Strategy:

In **level 3** of engagement, the RDOS works directly with citizens throughout the process to ensure concerns and aspirations are consistently understood and considered.

Type of Engagement:

- Workshop
- Committee
- Commission

Such as:

- Advisory Planning Commission (APC)
- Parks & Rec Commission

Level 4



Collaborate/ Partnering

Strategy:

In **level 4** of engagement, the RDOS partners with the public in each aspect of the decision-making process, including the development of alternatives and identification of the preferred solution.

Type of Engagement:

- Deliberative dialogue
- Workshop

Such as:

- Naramata Traditional Name project

citx's paqalqyn which translates as House of Bald Eagle

Level 5



Empower

Strategy:

In **level 5** of engagement, the RDOS places the final decision-making power in the hands of the public.

Type of Engagement:

- Alternate Approval Process (AAP)
- Referendum
- Election

Such as:

- General Local Election

IAP2 Public Participation Spectrum

INCREASING IMPACT ON THE DECISION 

	INFORM	CONSULT FEEDBACK	INVOLVE INPUT	COLLABORATE PARTNERING	EMPOWER
Public Participation Goal	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities, and/or solutions.	To obtain feedback on analysis alternatives and/or decisions. Defined Options	To work directly with the public throughout the process to ensure public concerns and aspirations are consistently understood and considered.	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities, and/or solutions.	To place final decision-making in the hands of the public.
Promise to the Public	The RDOS will keep you informed.	The RDOS will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	The RDOS will work with you to ensure your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	The RDOS will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	The RDOS will implement what you decide.

Foundations of IAP2

- Values-based
- Scope of Decision
- Goal Driven

Inform: “We have pie” Simple informed-based communications.

Consult: “We have pie. Do you prefer Key Lime or Cherry?”

Sharing influence in decision-making.

We do engagement to make better decisions.

People before Platform

- What works for participants
- Engagement is a human experience
- Tech can be a barrier
- Democratize the platform

Notes:

Decolonize language to make it more inclusive (action or game plan vs master plan).

We want to make meaning from our engagement.

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 (confirm Indigenous consultation and engagement)

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

Design

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

Implement

- 7 → Tell the story, invite response, report back

Evaluate

- 8 → Share the results and evaluate the 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 duty is to keep the public informed.

Always ensure Indigenous consultation and engagement are considered at the outset of all projects and initiatives.

Do I need to

ENGAGE THE PUBLIC

in my project?

YES

- ⇒ There are legal or statutory requirements for consultation
- ⇒ Opinions and advice offered by the public could influence the outcome
- ⇒ The Project affects the citizens, Indigenous communities, or stakeholders in any way, and the opportunity for public engagement has been promised

NO

- ⇒ There are no legal or statutory requirements for consultation
- ⇒ Citizens, Indigenous communities, or stakeholders will not be affected by the outcome of this project
- ⇒ Public input will not influence the decisions being made in this project

Inform

- ⇒ If citizens, Indigenous communities, or stakeholders will be affected by the project but input from the public will not affect the outcome of the project and all key decisions have been made, it is wise to engage the public but do not invite input

Prepare 2

DETERMINE YOUR OBJECTIVES

Before identifying or approaching audiences, it's important to fully understand what the RDOS is hoping to achieve by engaging the public.

For example, is the goal is to:

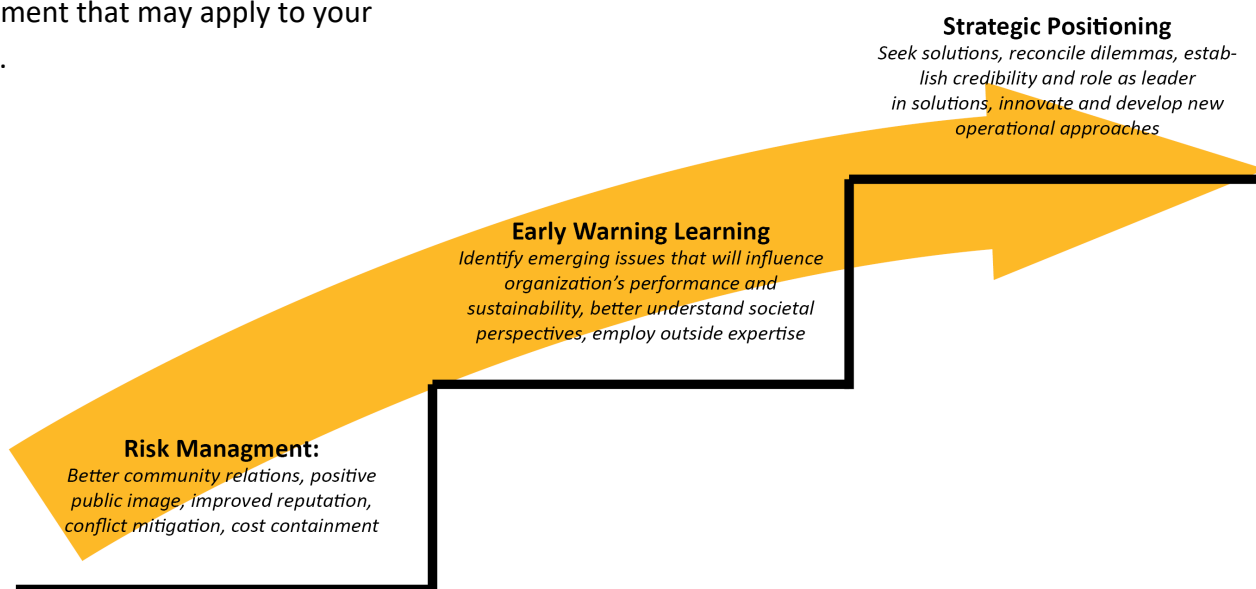
- Provide the public with accurate information?
- Hear public concerns?
- Help create a shared vision?
- Strengthen relationships with the community?

By clearly defining goals—and there may be several— they are more likely to be realized.

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 to 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 to help build understanding of the trade-offs
- Identifying a broader range of options
- Managing citizen expectations
- Informing citizens about plans and decisions that will affect their lives
- Mitigating project impacts on the public
- Providing a better understand of the complexities of an issue
- Reducing or avoiding delays



Business Case for Strategic Engagement: From Risk Management to Strategic Positioning

Prepare 3

IDENTIFY AND ASSESS YOUR AUDIENCE

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, the audience includes people, groups, institutions, or even other government bodies that are in some way impacted by a project.

Decide who the audience is, 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 encourage involvement.

This is also a good time to list other factors that might impact or be impacted by the project, such as the environment, transportation, or other projects within the RDOS or member municipalities.



RDOS — Engagement Opportunities

Potential Audience or Partners

Individuals:

- Resident
- Property owner
- Indigenous
- Visitor

Business and economic groups:

- Business owners
- Employees and employee groups
- Industry groups
- Chamber of Commerce
- Merchant associations
- Wine or similar 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:

- Penticton Indian Band
- Osoyoos Indian Band
- Lower Similkameen Indian Band
- Upper Similkameen Indian Band
- Okanagan Nation Alliance
- School District No. 53
- School District No. 67
- City of Penticton
- District of Summerland
- Town of Oliver
- Town of Osoyoos
- Town of Princeton
- Village of Keremeos
- Government of Canada
- Province of B.C.
- BC Transit
- Other municipalities or regional districts

Design 4

DETERMINE THE APPROPRIATE METHODS

Now you can begin planning the engagement process. List the likely key concerns or questions, and their expected level of involvement. Consult the Five Levels of Public Engagement (page 6) to determine which level is appropriate for the project, and to help choose the strategies and methods that will help fulfill the goals of the project.

Be specific for each action: list when it will happen, how it will happen, and who is responsible.

- **Timeline**
- **Method**
- **Role and responsibilities**

Design 5

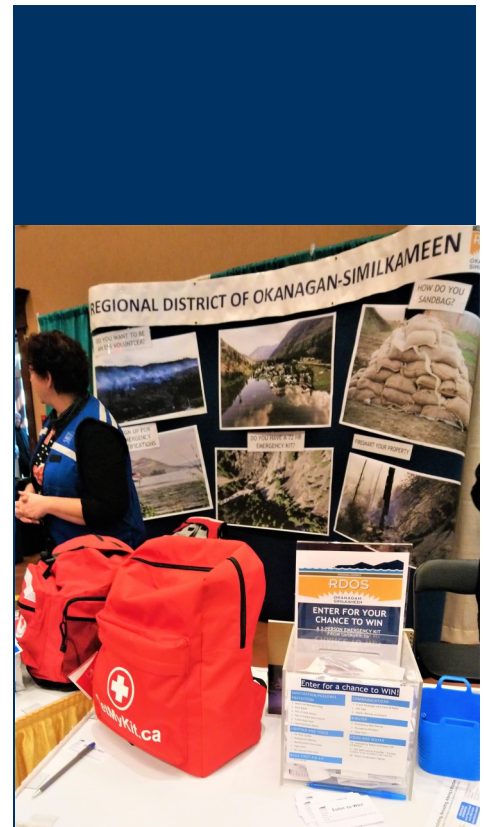
PLAN THE STORY

The goal is to build knowledge and understanding around the project to enable the public to offer meaningful feedback.

The story should offer information and facts in a clear, engaging way that is free of jargon, and is consistent across all the chosen platforms.

Work closely with Communications staff to help develop the story:

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



Storytelling Tools and Platforms

The tools used to convey the project’s story will depend on the level of engagement and the size of the intended audience. Some common communications tools include social media, videos, photographs, backgrounders and fact sheets, advertising, websites and story boards, and maps. There is no one-size-fits-all approach. RDOS Communications can help determine the best tools for the project and budget. This includes building awareness and understanding about the project, inviting the public to become involved, and reporting results and outcomes to participants.

CREATE THE ACTION PLAN

Methods of reaching an audience will vary with each project, but the goal is always the same:

raise awareness and to let the community know their involvement is invited and valued.

Using the information compiled in the previous steps will help inform the action plan.



What to communicate about the Project

Background Information

This outlines the parameters of the project. It provides details to help the public offer informed feedback.

Get started by answering the following questions:

- What is the project?
- What is issue is being addressed by the project?
- Where is the project located?
- Why is the project needed?
- Who is affected?
- What are the options?
- What are the constraints or trade-offs?
- How does the project tie in or compete with other projects in the community?
- How does the project tie in with RDOS or other government plans?
- What specific questions will participants be asked?

Contextual Information

This provides insight into the overall engagement process.

It also informs participants about the impact their input will have in the decision-making process.

Information to provide:

- A summary of the overall engagement process.
- How feedback will be collected?
- A timeline of events and milestones for the engagement process, and who will be making the ultimate decision(s)?
- What effect public input will have on the project?

Implement **7**

TELL THE STORY, INVITE RESPONSE, AND REPORT BACK

Now it is time to engage the public. Be open to all perspectives during meetings with the community.

Be straightforward when answering questions.

Maintain open lines of communication throughout the project by updating participants regularly, providing next steps, and reporting back on how their input was used.

At each step, it is important to thank participants for their participation and feedback.

The Seven C's!

Editorial guidelines require Communication that is:

1. **Clear**: Present information in plain language that is easy-to-understand.
2. **Concise**: Use brief, bullet-point lists and fact sheets rather than wordy paragraphs.
3. **Concrete**: Present factual information in a straightforward manner, and avoid speculation. Take care to remove any bias that may be seen to cloud public input.
4. **Correct**: Fact-check all communications material carefully to ensure information is accurate.
5. **Coherent**: Avoid wordiness and technical jargon.
6. **Complete**: Check with staff and managers in other departments to ensure key information is included.
7. **Courteous**: Be respectful of the time and effort participants are giving. All points of view are valuable.

Implement **8**

SHARE RESULTS AND EVALUATE PERFORMANCE

Before launching an engagement strategy, establish milestones and metrics that will serve as indicators of success, and identify tools to gather feedback.

Each stage of the project should be documented and evaluated internally, and based on feedback from participants.

Sharing the results will highlight lessons learned and improve future engagement initiatives.



Five Steps to a Successful Evaluation

1. Record the results of the engagement process, including participant feedback on the project.
2. Document methodology and process, and evaluate the success of the engagement against the guiding principles outlined on pages 3 and 4.
3. Share public feedback with other departments and staff who may work on future phases of the project.
4. Report the results to show how public feedback affected the outcome.
5. Share team evaluation of the 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 the project objectives?

5. What questions need to be answered in order to proceed with the project/decisions?

6. Who is the audience?

7. What are the potential impacts of the project on the audience?

8. What information does the audience require?

9. How might the audience influence the decision?

10. Why do we need to engage?

11. What are the risks of NOT engaging?

12. How broadly should we engage?

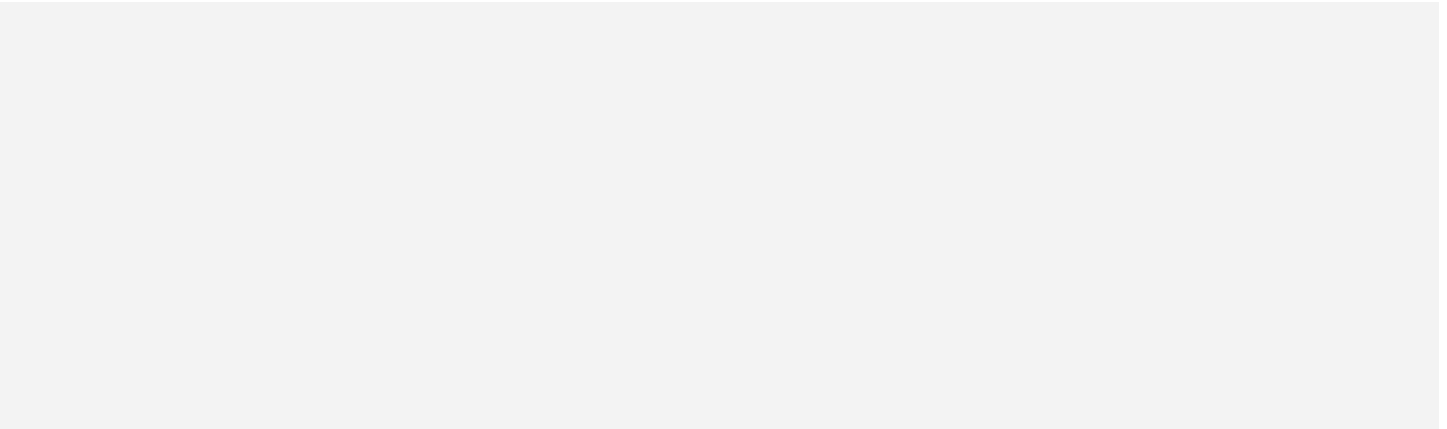
Check in with the Communications Staff

Prepare

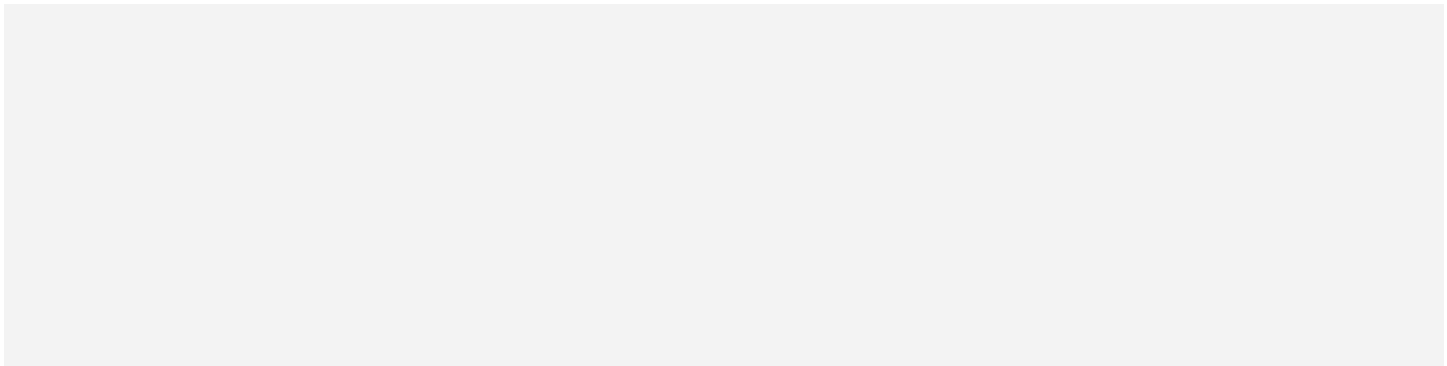
13. What influence or impact will participants have on the decisions?*(
(Refer to the Five Levels of Public Engagement)

**Important note: If the audience has no opportunity to influence the decision or outcome with their participation, don't continue planning an engagement process. In this case, the appropriate action is "Inform." Contact the Communications staff for further assistance.*

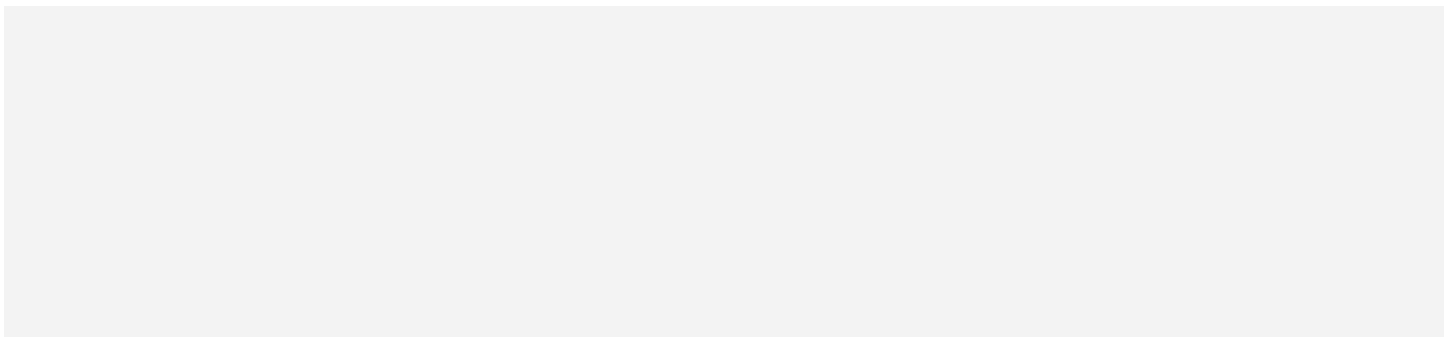
14. What specific engagement tactics will be used?



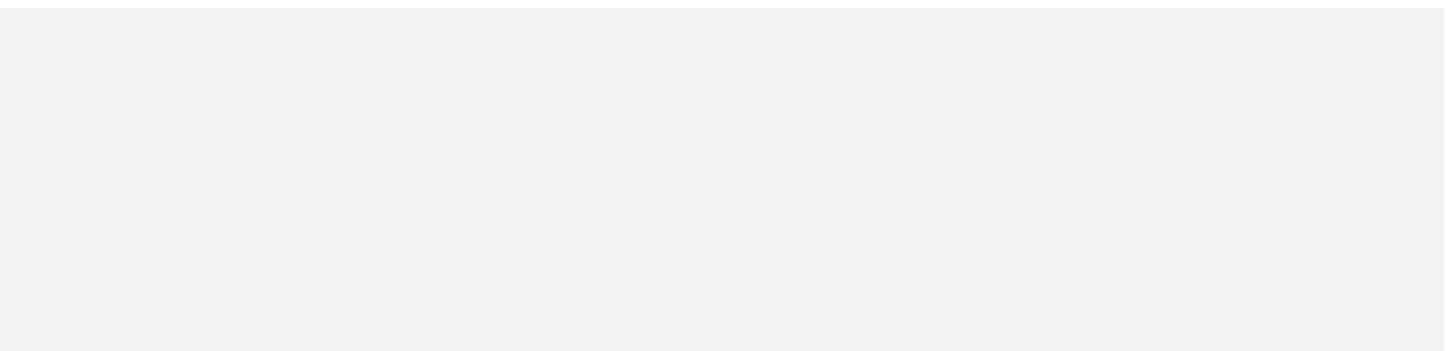
15. How long will the process take? Is it a simple question to be answered, or a major item requiring ongoing engagements, and decisions addressed by the Board?



16. Which platforms are best suited to sharing the project story?



17. How will people be invited to participate?



18. How will I report the findings—to participants, to the Board of Directors

Check in with Communications Staff

Implement

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

Check in with Communications Staff
for assistance with this phase

Evaluate

20. Were the objectives met? Why or why not?

Yes No

21. **Diversity.** Were a wide range of voices engaged and included? 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. Relevance. 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 share results?

Yes No

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

Yes No

27. Communication. Did communications and public engagement materials provide clear, objective, and helpful information at appropriate phases of the project?

Yes No

28. Transparency. Were the levels of involvement and influence clearly communicated with participants? Were results and updates shared with participants?

Yes No

29. Overall comments regarding the effectiveness of the engagement.

Yes No

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

Blank response area for question 30.

31. What could be done differently next time?

Blank response area for question 31.

Send completed team evaluation and participant feedback forms to Communications staff once the process is complete.

OTHER ENGAGEMENT TOOLS

Information Release Procedure

Information releases are used to communicate correspondence under the RDOS Chair's signature. Information releases should be distributed early in the process. When the Emergency Operations Centre is activated, information releases are the main method of communicating in a timely manner. Distribution methods include web, social media, email, and Voyent Alert!, Non-digital options include posters on notice boards at fire halls, libraries, community centres, and municipal offices, as well as sandwich boards.

Newspaper Ads & Regional Reflections

Please discuss advertising options with RDOS Communications.

Regional Reflections is a way to communicate information on behalf of the RDOS Board Chair.

The procedure is the same as an information release, and will be published in the second half of the month.

Corporate Identity Branding Guide

This guide is intended to be used by RDOS staff, committees and commissions, consultants, and graphic designers. The guide will help ensure consistency by providing standards and specifications for the use of the RDOS' corporate identity in a variety of situations. This guide should be followed for all RDOS printed and multi-media communications, including stationary, forms, websites, publications, and signage. Any pre-existing department sub-brands should not be used. All departments should adhere to this guide which is posted in the InterCom folder in EDMS.

Notification System

The RDOS has partnered with Voyent Alert! to provide notifications and alerts throughout the region.

Receive notifications for critical events, wildfires, and flooding, as well as day-to-day communications such as garbage and recycling information, water and sewer notices, and public engagement opportunities.

Once you've registered, you are automatically signed up for emergency notifications.

Media interviews, calls, and casual conversations

Key points to remember:

As per RDOS Communications Policy:

The Chair and/or their Designate is the primary spokesperson for the Regional District on regional matters. *The Chair is authorized to release information releases on behalf of the Regional District and provide media interviews in relation to any Board position.*

Other members of the Regional Board are secondary spokespersons for the Regional District on regional matters. The Electoral Area Director or designate is the primary spokesperson and promoter for their electoral area on matters pertaining specifically to their electoral area.

- Be open and responsive to media requests.
- Keep answers brief, factual, and to the point.
- Show concern for others affected by a crisis. Don't place blame.
- Do not speak for other organizations.
- Avoid speculation. Don't assume anything.
- Politely decline to respond to hypothetical questions.
- If you don't know the answer or are unsure about what to say, offer to get back to the reporter with accurate information.
- Be sure to follow up with the reporter as soon as you have the facts.
- **Consider all microphones and cameras LIVE.**
- There is no such thing as "off the record."
- If you provide "background" information, be clear on whether it is an attributable quote.





Elements of this guide were originally created by the District of North Vancouver and are used here with permission.