The art and science of designing online engagement

Miranda Eng, Senior Consultant | Context: An Argyle Company
IAP2 North American Conference 2019
Overview

1. **Introduction:** who we are
2. **Lay of the land:** how engagement is changing
3. **Building blocks:** steps for designing online engagement
4. **Case study:** how it can look in practice
5. **Questions:** let’s discuss
Context: An Argyle Company (Context) is a full-service and award-winning public engagement and communications agency.

We have almost thirty years of experience bringing diverse voices to the table to facilitate better decisions that work for communities and our clients, with the overall aim to build healthy and sustainable communities.
Hi, I’m Miranda.

I am a Senior Consultant at Context: An Argyle Company, one of the largest independent communication and engagement firms in Canada.

I am a Co-chair and board member of the hua foundation, a non-profit organization in Vancouver’s Chinatown working to advance civic decision-making, engagement and representation through an inclusive, anti-racism lens.
Engagement is changing.
What are your challenges with online engagement?
Online engagement is hard.

How do you choose the right online platform and tools to use to creatively inform (and not bore) people, to gather the input you need, while reaching those underrepresented populations you want to hear from?
Today’s topics
Building blocks for designing online engagement

PLAN
How to select your platform and tools to meet your project and engagement objectives

BUILD
How to design your platform to inform (and not bore) your participants

REACH
How to hear from targeted groups to hear from underrepresented voices and strengthen your data

REPORT
How to analyze and integrate the data to tell decision-makers and the public the story of what you heard
Today’s case study
Engaging Metro Vancouverites online about mobility pricing

**Situation:**
The Mobility Pricing Independent Commission was tasked with exploring how we might implement mobility pricing in Metro Vancouver – the practice of paying to use the roads to reduce traffic.

**Objectives:**
Inform and gather input from Metro Vancouver’s diverse population on potential mobility pricing options and key considerations.

**Key challenges:**
- Lack of public awareness on mobility pricing
- Lack of understanding on impacts and benefits
- Meaningful conversation amidst affordability crisis
- High levels of frustration and controversy
What we did:
We developed and implemented *It’s Time*, an integrated communication & engagement program which included:

- Public online engagement
- Robust stakeholder and elected official engagement
- Multilingual communications campaign
- Targeted group and multicultural outreach
- Extensive analysis and reporting
PLAN

How to select your platform and tools to meet your project and engagement objectives
Step 1: Design a research-based strategy

1. Research your risks, context, and audience
2. Identify your project and engagement objectives
3. Confirm input required for the planning or technical process
4. Develop engagement and comms strategy
5. Develop questions for in-person and online engagement
6. Select your online platform and tools

Plan | Build | Promote | Report
### Step 2: Confirm your project objectives

#### How will you use public input in your project?
- Feeding into structured decision-making process
- Creating a vision
- Submitting feedback
- Assessing consensus and support

#### What kind of public input do you need?
- Input into values, principles or criteria
- Ideas or suggestions
- Feedback or evaluation
- Impacts or consequences
- Voting

#### What reporting output(s) would be most useful?
- Public input data (qualitative, quantitative, and/or geo-based)
- Participation data
- Segmented data based on demographics
<table>
<thead>
<tr>
<th>How will you use public input in your project?</th>
<th>What kind of public input do you need?</th>
<th>What reporting output(s) would be most useful?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consider a platform that:</td>
<td>Consider a platform that:</td>
<td>Consider a platform that:</td>
</tr>
<tr>
<td>• Can be used for multiple phases for a consistent user experience</td>
<td>• Has the tools or features you need to facilitate your data gathering (map-based, vision wall, tradeoff analysis, consensus analysis)</td>
<td>• Allows you to tag or theme comments in real-time</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Provides detailed participation data</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Allows you to cross-analyze data based on demographics</td>
</tr>
</tbody>
</table>
Step 3. Understand your engagement objectives

How complex is the information?
Consider a platform that:
- Offers formatting to lay out info in digestible ways (drop-downs, headers)
- Displays videos, gifs, images to help educate in a visual way
- Offers real-time interactive tools that show constraints and tradeoffs

How contentious is this project?
Consider a platform that:
- Has tools that demonstrate transparency
- Displays real-time polling or voting results
- Allows participants to see what each other are saying

How can you make your platform more inclusive?
Consider a platform that:
- Can be translated (the platform and comment features)
- Has simple navigability, is user-friendly and has a visual layout
- Is WCAG 2.0 accredited
Step 4. Select your online platform and tools

1. **Front-end engagement tools**
   How participants provide their input.

2. **Layout and formatting features**
   How the content and engagement tools are laid out for participants.

3. **Back-end tools and features**
   How the project team can gather, monitor and export the data. Back-end features can also include moderating participant comments for profanity and detailed participation analysis based on demographic questions.
Step 4. Select your online platform and tools
Case study: It’s Time engagement program

Selecting our online platform for a contentious engagement

How we started

What we needed in our online platform and tools

Audience research

Issues analysis

Engagement objectives

Project objectives

Integrated technical and engagement process

Layout features:
- Communications: Able to format and display videos and visuals
- Multilingual: Available in four languages
- Accessible: User-friendly on all devices for different age and literacy levels

Front-end engagement tools:
- Rating scale to gather the level of support for different mobility pricing options
- Open-ended questions and interactive commenting to gather issues and considerations
- Survey questions to gather participant demographic data
- Real-time report back

Back-end features:
- Participation analytics: Review participation trends, underrepresented groups, and traffic channels
- Data is securely hosted in Canada with data integrity measures to monitor suspicious activity
- Moderation pane: Review and delete inappropriate comments
BUILD

How to design your platform to inform (and not bore) your participants
Step 1: Develop a budget and workback

Select and confirm the best tools to ask engagement questions

Develop content needed to help public provide informed input

Build platform

Test platform

Refine platform

Launch and trouble-shoot platform
Step 2. Design your platform for your user

**Navigation process**
- Hold your user’s hand
- Give your user breaks

**Communications content**
- Use simple, inclusive language and visuals
- Balance informing with overloading

**Engagement tools**
- Put your priority questions first
- Ask clear and short questions

**User experience**
- Don’t ask for too much time
- Give people space to be heard
Step 3. Refine platform design to be user-centered

- **Start with needs**: User needs, not government needs
- **Iterate**: Then iterate again
- **Do the hard work**: To make it simple
- **This is for everyone**: Design with data

Part of Gov.UK 10 design principles
**Educated**
Used multilingual infographics, videos and drop-downs to share complex information

**Engaged**
Used radio buttons and interactive public commenting to gather input

---

**Case study: It’s Time engagement program**

**Informing and engaging Metro Vancouverites on mobility pricing**

---

**What about changing the fuel tax?**

- Conducting Consensus in Metro Vancouver Fuel Tax Forum

**Plan**
Build
Promote
Report
REACH

How to hear from targeted groups to hear from underrepresented voices and strengthen your data
Step 1. Design a strategy and allocate a budget

- Define targeted groups and representation goals
- Develop promotional outreach strategy and budget
- Develop demographic questions for engagement
- Develop campaign and outreach materials
- Launch outreach and promotional campaign
- Monitor and adjust promotions based on participation
Step 2. Develop outreach and promotions campaign

**DEFINE**

Understand your audience and how to reach them
- Research demographics and identify targeted groups
- Segment audiences and understand their preferred communication channels and ways to engage

**TARGET**

Develop multi-pronged outreach and promotions campaign
- Include demographic questions in your in-person and online engagement
- Develop appropriate and compelling promotional materials
Step 3. Launch, monitor and adjust

Monitor and tweak your outreach
- Launch your promotions
- Execute community-based and in-person engagement activities, integrating the online platform
- Monitor and analyze participation on the platform back-end
- Continue adjusting digital ad targeting and outreach
Multiple avenues for input
Developed a targeted outreach strategy with the online engagement in the region’s top four languages, parallel paper surveys, and community-based events.

Promoted, monitored and adjusted
Launched multilingual digital and traditional campaign, and adjusted digital ads to hear from underrepresented groups (including geographies, gender, and language).

Case study: It’s Time engagement program

Hearing from seldom heard groups on a policy that would impact them

Plan
Build
Promote
Report
REPORT

How to analyze and integrate the data to tell decision-makers and the public the story of what you heard
Step 1. Allocate time and budget for data analysis

Determine the public input sought from the engagement

Collate and consolidate in-person and online engagement data

Code comments, refining and defining themes

Finalize report leveraging visuals and simple language

Draft engagement questions, design and launch engagement

Conduct preliminary coding and develop theme framework

Summarize findings and draft report
Step 2. Continually involve your project team

1. What do decision-makers need to know from the findings and final report? This will inform your themes and how you code the data.

2. How can we demonstrate the credibility of the findings? This will inform how you design your engagement, interim reporting, and the online platform and tools you use.

3. How can we best tell the story of what we heard in a transparent way to be accountable to stakeholders and the public? This will inform how you draft and design the report, and what kind of reporting outputs you deliver.
Transparency in reporting back on what we heard and the views represented in the findings

Displayed participant comments and voting results in real-time on the online engagement, and leveraged data visualization in reports.

**Case study: It’s Time engagement program**

**Telling the story of what we heard**

**Reported back in multiple formats**

Developed sharable infographics and multilingual reports to share with the public.

---

**FAIRNESS THEMES FOR CONGESTION POINT CHARGING**

<table>
<thead>
<tr>
<th>EMERGING PUBLIC THEMES</th>
<th>NO OF COMMENTS</th>
<th>RELEVANT COMMENTS INCLUDED WITH THE THEME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased use of technology, concerns and footage of being penalized</td>
<td>658</td>
<td>• I had a teen away from home and my work because of this, I lost a lot of money.</td>
</tr>
<tr>
<td>• I had a kid away from home and my work because of this, I lost a lot of money.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• In the future, I need to drive as there are no alternatives.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Why do I have to pay if it is existing that the program is highly expensive and驾驶员</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• We already pay for it anyway to drive for the public services.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• It is not fair for people who have no control over movement.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improve roads and other modes of transportation</td>
<td>652</td>
<td>• Improve public transport for mobility.</td>
</tr>
<tr>
<td>• Improve parking and other options.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• I would have more if there were incentives such as better reliability and shorter travel times.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Provide better access to public transportation.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Other modes of mobility are either more expensive or require a reduction in mobility.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• If you value the transit system you would capture a portion of your transportation cost.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>• This will target lower-income workers and disabled people who depend on cars for a living and already struggle to do so.</td>
<td></td>
</tr>
</tbody>
</table>

**Plan**

**Build**

**Promote**

**Report**

---

**What we learned**

The graphic below presents our key findings on how they vary and form the foundation of our recommended priorities in the next section.

1. Congestion is a problem with major consequences.
2. Travel patterns are complex, good access is key.
3. The transportation sector is in a period of rapid change and innovation.
4. Prices influence travel behavior and affect congestion and reduce congestion.
5. Public support for congestion charging is low, but many are undecided. There are several measures that can increase acceptance.
6. A reduction in emissions could have significant non-greenhouse gas benefits for some households.

Just that means there are many available to offer some of the concerns about equity and affordability.
Steps to designing and delivering online engagement

1. Research your risks, context and audience
2. Confirm your objectives and representation goals
3. Identify input required for the planning or technical process
4. Develop engagement and comms (including promotions) strategy
5. Select your online platform and tools
6. Develop engagement and demographic questions
7. Build, test, and refine online platform
8. Develop comms content for engagement
9. Develop campaign and outreach materials
10. Launch engagement, outreach and promotional campaign
11. Monitor and troubleshoot platform
12. Monitor and adjust promotions based on participation
13. Build, test, and refine online platform
14. Collate and consolidate in-person and online engagement data
15. Develop theme framework and complete coding
16. Finalize report leveraging visuals and simple language
17. Summarize findings and draft report
Thank you for your time.

Miranda Eng, Senior Consultant
meng@contextresearch.ca

Learn about us at contextresearch.ca