Community Engagement Toolkit Matrix

WATERLOO REGION Community Foundation

Engagement Methods / Tools	Description	Level of Public Participation					Benefits	Considerations	Importance
		INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER			
Advertised Outreach Strategies (i.e., newspaper, TV, radio, digital)	Newspapers, radio stations, and other mass outreach media can be used to inform the public of upcoming engagement events and activities. (Queensland Government, 2017)	✓					A very quick and efficient way to reach a large audience. Can provide a clear call to action for people to get involved.	• Can be time-consuming: websites require regular maintenance and invest • Resources are needed to help review, monitor, provide comments back to the community, update content, and to monitor the user experience of the social media platforms/project websites being used. • Information should be presented using simple graphics and non-technical jargon. • Emails need to be tracked and monitored on a weekly basis to avoid any glitches, to reply to those who interact, and to prevent miscommunication of information.	🔴
Advocacy Training	Empower community members to participate in government planning processes, and provide them with tools and training to communicate directly with decision makers and elected officials. This involves training in public speaking and facilitation. (Futurewise, 2014)	✓	✓	✓	✓	✓	Helps instill confidence among community members in better understanding the planning process. It provides the opportunity for those affected to be included.	• Can be conducted online. • Preferred method is to facilitate in-person training. • Immigrant communities can feel intimidated by this process, so ensure that an equitable process and a welcoming environment are incorporated. • Funding could be provided to the community to conduct their own workshops and training.	🟡
Citizens Advisory Committee	Citizens Advisory Committees (CACs) are comprised of 6-8 citizens who offer community expert advice on policies, plans, issues, and initiatives. CACs meet on a regular basis, and are often chaired by a city councilor or staff member. They can be for a specific time period and for a particular purpose. They can also be established to provide long-term guidance on certain topics under a municipality's jurisdiction. (Tamarack Institute, n.d.)	✓	✓	✓	✓	✓	Citizens can express their opinions and concerns on a range of planning topics (e.g. transportation, community economic development, social issues, environmental stewardship, budgeting, etc.). Members learn vital information by discussing topics in detail, and listening to a range of perspectives. CACs can contribute to the collaborative solving of issues.	• Consider the type of community representation and expertise needed for the issue you are tackling. • A full representation of citizen interests is ideal, although this can be challenging given the size of the committees. • Determine the specific role of the committee (e.g. consultative, collaborative). • Determine what the goal of the discussions will be, and check back against it regularly to determine progress.	🟢
Citizens Panels (also known as Deliberative Polls)	Large groups of people, who are representative of the population, who deliberate on a variety of issues. Surveys are sent for the purpose of better understanding the community over a specified period of time. (Queensland Government, 2017)	✓	✓	✓	✓		If an equitable selection method is applied, this can be an effective method for gathering input from a comprehensive representation of community members over time. Citizens Panels provide an opportunity for community members to understand planning concepts and process.	• Expectation to make decisions through this deliberative process can be expensive and resource-intensive to manage both recruitment and the process.	🟡

Created by Kitchener Waterloo Community Foundation: May 2022
Rebranded for Waterloo Region Community Foundation: September 2022

260 KING STREET WEST – UNIT 206, KITCHENER, ON N2G 1B6   **WRCF.CA**

Engagement Methods / Tools	Description	Level of Public Participation					Benefits	Considerations	Importance
		INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER			
Citizen Juries	A group made up of community members (should be representative of the local community and its diversity) are educated on a project and asked to discuss issues, opportunities, possible solutions, or approaches. The aspect of a project that is discussed should require a decision to be made. (Tamarack Institute, n.d.)	✓	✓	✓	✓	✓	Empowers the community to make decisions.	• Jury members should be given access to an appropriate amount of resources in order to come to a well-informed decision. • Jury members need to be diverse and fully representative of the community. • Other strategies should be used prior to this strategy to ensure community members are well-informed and ready for the responsibility this can require. • If you use a Citizens Jury to make decisions, you need to be prepared to act on their recommendations in an authentic way.	🔴
Community Boards/Writing Walls	An informal participation method where planners can set up pop-up stalls and boards in neighbourhoods to provide the opportunity for community members to share their ideas and concerns. (Community Planning Toolkit, 2014)	✓	✓	✓	✓		An interactive way to further engage the community in a collaborative planning process. Engages community members on relevant topics regarding their neighbourhood. This method can be "set up" in any community, and should be quick and easily accessible for all members to participate.	• Utilize public spaces to set up a writing wall (a board, using a shop window, easels set up on a park, a display in a community centre, etc.). • Create leading questions so that community members can build on their responses. • If possible, get community volunteers to assist anyone who needs support, including providing alternative collection methods for those with disabilities.	🟢
Comprehensive Community Planning	Comprehensive Community Planning is a process that enables communities to develop and implement their own community plans. More specifically, it is a continuous process that enables Indigenous communities to plan its development in a way that meets its needs and aspirations in all aspects of community life. (Indigenous Services Canada, 2018)	✓	✓	✓	✓	✓	This process empowers Indigenous communities. This method helps protect resources through early identification of vulnerable areas. Comprehensive Community Planning provides space for reconciliation and healing.	• Create a communications strategy to ensure clear goals and objectives, awareness and timely notices about meetings, the sharing of progress and updates, and incorporation of feedback throughout the process. • Provide mentorship: communities learn from on-the-ground expertise, resources, and tools that the Indigenous planning mentors bring to the table. • Provide resources – human, financial, and technological to ensure outcomes are implemented with ease.	🔴

Created by Kitchener Waterloo Community Foundation: May 2022
Rebranded for Waterloo Region Community Foundation: September 2022

260 KING STREET WEST – UNIT 206, KITCHENER, ON N2G 1B6   **WRCF.CA**

Engagement Methods / Tools	Description	Level of Public Participation					Benefits	Considerations	Importance
Community Questionnaires (Surveys)	Community Questionnaires are sent to a randomized selection of households to gather input, in order to gather additional insights on project issues and the local population's views on the community consultation design. This can help inform how to further improve the design of the engagement process and/or provide more viable solutions to important issues related to development projects. These questionnaires should include non-biased, open-ended questions that are targeted towards a variety of demographic groups. The questionnaires can be made available to complete via online, face-to-face interviews, over the phone, or through email communication. (Queensland Government, 2017)	✓	✓	✓			Community Questionnaires are a great way to gather both qualitative and quantitative information from specific demographics/populations. They provide the opportunity to inform, reach, and educate people about a project and the engagement process.	• Some responses may be biased, and the amount of in-person responses received can be low compared to responses received via online questionnaires. • In order to get accurate results, this method can become costly and labour-intensive, and requires some investment in additional resources to maximize outreach.	🟢
Community Mapping/ Workshops	Maps and photographs of an area, or specific location, are used to illustrate how people view their area. Mapping is a useful way to engage a wide-range of opinions. A variety of aspects can be mapped including land use, community assets, facilities, and transport options to develop a snapshot of an area. This can be conducted in-person or online. (Sparc BC, 2013)	✓	✓	✓	✓		This method is a very interactive way to engage community. It helps the community visualize the potential project.	• A large map can be laid on the floor so people can engage in a fun and interactive way, by walking on and around it, and marking elements or placing icons on it. Alternatively, large maps can be set out on tables or pinned on boards to help with accessibility. • You can host guided walks of the area to take visual photographs of things people like and those they want addressed that can be brought back and used in the mapping exercise. • If you are holding these sessions online, use digital maps and set questions that can be answered, to prompt participants to provide input.	🟢
Community Reference Group (CRG)	Individuals are selected by the local community to facilitate discussions and act as a conduit between developers and/or municipalities and a specific group(s). Set clear parameters and terms of reference including purpose, goals, and voting agreements. (Queensland Government, 2017)	✓	✓	✓	✓		CRG members can provide their own feedback or ideas about a planning project. CRG members can also act as a conduit between the broader community and the developer, municipality and/or organizations engaged in a project. The incorporation of community-led decision-making and input over time, depending on the agreement with local government(s).	• This is a relatively slow-paced decision-making process, governed by terms of reference. • It can be good for broad consensus, it may not necessarily be demographically representative.	🟢

Created by Kitchener Waterloo Community Foundation: May 2022
Rebranded for Waterloo Region Community Foundation: September 2022

260 KING STREET WEST – UNIT 206, KITCHENER, ON N2G 1B6   **WRCF.CA**

Engagement Methods / Tools	Description	Level of Public Participation					Benefits	Considerations	Importance
Design Charrette Sessions	Design Charrette Sessions can be used to collect a variety of insights from participants. A charrette is a type of workshop that is held over 3 to 4 days involving community members, the project team, and planning and design professionals. Participants are asked to work in small groups, brainstorm, conduct a SWOT (Strength, Weaknesses, Opportunities, and Threats) analysis, and collaboratively work together to identify trends and issues regarding a project's design and development plan. (Queensland Government, 2017)			✓	✓		Design Charrette Sessions can be a great way to build relationships, collaborate, and exchange ideas with a variety of professionals and community members from diverse backgrounds, in an accessible environment using an equity lens.	• Mark on a map their home, the public spaces they frequent, and the routes they use. Identify the factors that make these trips easy or difficult to complete. • These sessions require a lot of resources and it typically takes 5-8 weeks to plan the events. However, it is a great way to address complex issues in a short amount of time.	🟡
Digital Storytelling	Digital Storytelling involves using technology to give participants a voice. Participants can use photographs, video, music, writing, etc., to share their story, perspective, and opinion. The project team should listen and view rather than direct or guide participants. (Tamarack Institute, n.d.)	✓	✓	✓			Gives participants power to share their 'story' through a variety of mediums. Allows all voices to be heard in the way that they would like. Great option to make all community members comfortable with engaging in the project and planning process.	• Community provided materials need to be reviewed and interpreted.	🟢
Focus Groups	Focus group consultation workshops are a great way to engage a small group of participants (i.e., 5-10 people). This particular workshop should allow participants to share their concerns and should seek to discuss the SWOT (Strengths, Weaknesses, Opportunities, and Threats) of a project or the engagement design process. This method can help gain an understanding of the experiences of groups in the environment, neighbourhood or community, and how their lives are shaped by it. (Queensland Government, 2017).	✓	✓	✓	✓		Provides participants with an opportunity to speak in a more detailed and calm environment about their opinions on a project's objectives, issues and accomplishments.	• How will you select (randomly or not-randomly) a group of individuals to participate? How many groups will you hold? • It is recommended that you focus on a singular topic with a targeted agenda addressing a maximum of six questions (i.e., how will this project impact you as a person of colour? What influence could this development have on your quality of life as a person with a physical disability?). • Provide context of the development and meeting through background material and/or with a presentation at the beginning of the focus group. • Will you hire a facilitator, or does a member of your team have that skill? • Provide a variety of meeting times and locations. • Outline the rules and guidelines of the meeting. • Keep record of the discussion content and information regarding the participants who took part in the focus group. • Conclude the session with the participants and summarize the focus group findings, providing a copy to the participants that attended.	🔴

Created by Kitchener Waterloo Community Foundation: May 2022
Rebranded for Waterloo Region Community Foundation: September 2022

260 KING STREET WEST – UNIT 206, KITCHENER, ON N2G 1B6   **WRCF.CA**

Engagement Methods / Tools	Description	Level of Public Participation					Benefits	Considerations	Importance
In-Person Public Meetings	Discussions at public meetings are usually based around a theme and participants are encouraged to contribute to meaningful discussions, and have the opportunity to provide feedback on issues. Meeting minutes are recorded and are made available for the public to access after the meeting has ended. (Queensland Government, 2017)	✓	✓	✓	✓		Allows participants the opportunity to vent and have their opinions and questions heard and answered in one location. Allows for an opportunity where important issues can be raised in a controlled environment. Opportunity to gather information about participants' everyday lives, and the chance for those running the meetings to gain knowledge about issues, needs, and wants.	• Will you need to organize and manage multiple public meetings in order to gain a better understanding about specific issues that need to be addressed and resolved?	🟢
Learning Circles/ Engagement	Learning Circles are a holistic way to engage in teachings or consultations. They can help alleviate power dynamics, ensuring a safe space for every participant to speak. (Meeting in the Middle – Engagement Strategy and Action Plan, 2018)	✓	✓	✓	✓	✓	Promotes inclusive dialogue to uplift voices of Indigenous Peoples. Mutually beneficial engagement/ collaboration.	• Respect should be present at every stage of the process and be controlled by the community. • Hire an Indigenous consultant, facilitator and/or organization to plan and deliver the learning circle/engagement session to ensure it is grounded in an Indigenous perspective. • Consult with an Indigenous Community Advisory Board around who might be appropriate to do this work. • Invite an Elder/Knowledge Keeper/Traditional teacher to provide an opening and closing to ensure the engagement session begins and ends in a good way. Elders have different teachings, so it is best to get a recommendation from Indigenous partners for an Elder. • Hold the session at an Indigenous space or a space comfortable and accessible for Indigenous partners and community members. • Ensure meeting times work for participants. • Ensure food is provided to promote relationship-building. • Make room for consideration of input, changes, or new options. • If you are engaging with Indigenous communities and are not willing to shift control and/or co-create - then consider your intentions for engagement. • The process of engagement should not do any harm and should benefit Indigenous communities.	🟠

Created by Kitchener Waterloo Community Foundation: May 2022
Rebranded for Waterloo Region Community Foundation: September 2022

260 KING STREET WEST – UNIT 206, KITCHENER, ON N2G 1B6   **WRCF.CA**

Engagement Methods / Tools	Description	Level of Public Participation					Benefits	Considerations	Importance
Neighbourhood Participatory Process	Neighbourhood Participation Processes focus on involving people in the community to get the maximum benefit for the whole society. They are about gathering different views from whoever wants to participate, and making people in the community (or neighbourhood) feel welcome to voice their opinions. (Escalante & Valdivia, 2015)	✓	✓	✓	✓	✓	All community members are given the space to voice their concerns, ideas, thoughts, questions, etc. This is a great learning process for planners and developers involved in the project to learn from and understand the community's needs. It also helps them see the neighbourhood from the perspective of the people who live there, or will live there.	• Consider hosting an Exploratory Walk of the neighborhood where participants can identify attributes of the built environment (i.e., public spaces, services, stores). • Participants are interviewed to gather information about their everyday lives, and to increase planner's knowledge of them. The culmination of the process is a workshop dedicated to various engagement groups. • A discussion amongst the group occurs where they can outline their experiences and potential similarities or differences. • Tools used, according to the authors: Assessment Questionnaire, Community Mapping, Neighborhood Photo voice (provide cameras to participants to take pictures of impactful areas and meet after to discuss reasoning and connections), and Exploratory Walks.	🔴
Online Survey Tools (i.e., Survey Monkey)	Online survey tools are a quick and cost-effective way to gather feedback from the public. For this tool to be used effectively, it is important to figure out questions to ask well in advance, and determine how and where to promote the activity so that participants can be encouraged to get involved. (Queensland Government, 2017)	✓	✓				Great option for obtaining feedback in a fast and reliable manner. Cost-effective, and you are able to gather quantitative/statistical data.	• If participants have access to smart phones, or if you can provide access to smart phones, use the Recitoire Mobile application. This tool is used by citizens to collect data on their movements in the built environment and how they are feeling while in these areas. This acts as a way for urban planners to understand how citizens feel in different urban environments, and what aspects must be addressed. The application is downloadable on iPhones and Android devices. • It is not usually possible to gain additional feedback from participants after the data is obtained.	🟢
Online Workshops	Online workshops are designed to encourage people to participate in an online session where they would be educated about a project/process from experts or professionals. There are opportunities for participants to ask questions related to a project's process in a secure, equitable, and safe manner. (Queensland Government, 2017)	✓	✓				Provides an opportunity for those who are unable or not interested in attending in-person education sessions to participate at their own convenience. Allows the organizers to attract people from a larger geographic area, with no requirement for travel to the session.	• Participants who wish to join are required to have access to internet. Internet can be provided to participants if there is a feasible budget. • Additional expenses may be required to ensure workshops are designed to be effective when addressing community concerns.	🔴

Created by Kitchener Waterloo Community Foundation: May 2022
Rebranded for Waterloo Region Community Foundation: September 2022

260 KING STREET WEST – UNIT 206, KITCHENER, ON N2G 1B6   **WRCF.CA**

Engagement Methods / Tools	Description	Level of Public Participation					Benefits	Considerations	Importance
Online Forums	An online forum is a virtual space that can host information about projects, surveys that explore community sentiment about aspects of a project, and forums that enable community members to post comments and engage in conversation about the project. Community members can express their viewpoints in the form of a post. They can be short-term or long-term forums (days or weeks or even months). (Queensland Government, 2017)	✓	✓	✓	✓		Online forums provide people access to communicate with planners and local government. Useful for generating interest and feedback from the public over a period of time. An online forum is accessible at any time of the day and therefore appealing to those with busy schedules. It is budget-friendly to run an online forum.	• Moderation of a site is often not required. However, it is important to ensure a safe and friendly online platform and clarify ground rules for discussions. • Less accountability for community members because of the 'faceless' nature of online platforms, and the degree of anonymity that community members feel that they have. • Online discussion platforms often attract community members who are passionate about planning projects.	🔴
Open Space Meetings	Community leaders are given the opportunity to facilitate a public meeting involving the project team and members of the public. The community drives the agenda and timeline of the meeting with support from the project team. (Tamarack Institute, n.d.)	✓	✓	✓	✓	✓	Empowers the local community. Community perspectives, needs, and opinions are made very clear in this forum. Opportunity to gather information about participants' everyday lives, and the chance for those running the meetings to gain knowledge about issues, needs, and wants.	• It is necessary for the project team to lend support to community leaders in order to ensure the meeting remains organized and purposeful. When this strategy is executed well it can build strong working relationships with the community, and ensure all community needs are fulfilled by a project.	🔴
Participatory Budget Making	Community members make decisions on how to spend part of a public budget. This allows taxpayers to work with government staff and decision makers to make the budget decisions that impact their lives. (Sparc BC, 2013)	✓	✓	✓	✓	✓	Enhancement of participation in local decision-making. A better focus on issues of social exclusion and neighbourhood renewal. Could provide additional support to marginalized neighbourhoods. Cost-efficient improvements in service delivery.	• Here is a potential process to follow: - Community is surveyed and community members brainstorm spending priorities and ideas. - Volunteer budget delegates meet and develop budget proposals based on the spending priorities and ideas developed within an available budget. - Residents vote on proposals. - Government implements the budget decisions. • How will the community members who make these decisions be updated about the outcome of their decisions?	🟢
Pop-up Urbanism	Low-cost interventions delivered to help community members experience changes pertaining to streetscapes, public and community spaces. (Futurewise, 2014)	✓	✓	✓	✓		First-hand experience for communities to better understand changes in the urban environment.	• Participation level depends on the ability and access for communities to provide feedback. • Local government's ability to be able to respond to community feedback. • Pop-up urbanism can look like temporary bike lanes, pop-up markets, temporary plantings, etc.	🟢

Created by Kitchener Waterloo Community Foundation: May 2022
Rebranded for Waterloo Region Community Foundation: September 2022

260 KING STREET WEST – UNIT 206, KITCHENER, ON N2G 1B6   WRCF.CA

Engagement Methods / Tools	Description	Level of Public Participation					Benefits	Considerations	Importance
Public Art Sessions	Facilitation techniques that encourage community members to participate in planning processes using art to express their ideas. Art can be used to capture input related to neighbourhood planning or housing design (e.g. a new look for a community, street or park). (Queensland Government, 2017)	✓	✓	✓	✓		This method engages people who are visual in their communication. Suitable for all age groups. Interactive and engaging. Can help develop a common vision.	• Level of participation depends on community members being comfortable to draw or create art to explain their opinions or describe their vision. • A public art exhibit can be organized to generate further discussion. • Can be used to illustrate the community's vision of how a neighbourhood may look.	🟢
Recitoire	Recitoire is a mobile application where data is collected, including the path followed by a citizen and the different kinds of media files they produce all along the path, to illustrate their feelings and impressions on a given theme that has been chosen for the survey by urban planners. A server application centralizes the collected data and offers an interface for both their exploration. (Noël et al, 2014)	✓	✓	✓	✓		Supports qualitative surveys. Citizens provide an urban narrative - stories of their experiences through visuals, video, audio, and text. Involves citizens in urban planning projects.	• Level of participation depends on community members having access to a mobile/technology needed to use this tool. • Can be used to illustrate the community's vision of what the urban space means to them, which can inform urban planning project decisions. • Budget for internet access since citizens will need access to Wi-Fi to use the app.	🟡
Social Media/ Websites/Email Feedback	Social Media: a great tool that is used to convey information in an accessible, transparent and cost-effective manner. Email Feedback: another efficient and cost-effective way to gather insights from the community on a variety of issues. Websites: can be used to provide accessible, clear information to a broad audience. (Queensland Government, 2017)	✓	✓	✓			Social media platforms can increase the participation in online engagement substantially. Social Media/Email Feedback can keep everyone updated, and can be used to inform participants and individuals who are unable to attend in-person public meetings and workshops about a project's status. Websites help create one space for all information. They can provide a link to any online surveys and lots of targeted information about planning concepts and planning projects cost effectively.	• This can be expensive due to the amount of planning and resources required. It can also be difficult to monitor the effectiveness of how well the public is being informed and educated on a project or process. • It is important to map out a social media plan, and build in a way to gather metrics to understand what is resonating with your target audiences. • There is a high possibility that important minority groups can be forgotten or missed in the process • Requires maintenance to ensure information is being updated. • Ensure content is provided in multiple languages and using simple graphics.	🔴

Created by Kitchener Waterloo Community Foundation: May 2022
Rebranded for Waterloo Region Community Foundation: September 2022

260 KING STREET WEST – UNIT 206, KITCHENER, ON N2G 1B6   **WRCF.CA**

Engagement Methods / Tools	Description	Level of Public Participation					Benefits	Considerations	Importance
SpeakOuts (Informal Open House)	SpeakOuts are Open Houses that are informal and interactive public meetings designed for structured drop-in participation by community members. They can be organized at the beginning of the process (introduce a community to a project) — or at the end of a process (to gain feedback from material generated through other consultation processes). This can occur in multiple places at different times to ensure maximum engagement. (Futurewise, 2014)	✓	✓	✓			Provides flexibility in the level and timing of engagement. Effective when broad community participation is required, and a less structured time format is preferred. SpeakOuts can be hosted in different locations around a community, which reduces many barriers to engagement, and can attract more interest than a typical public meeting.	• SpeakOuts can require significant staffing resources. • Go to places where people are already gathering rather than asking people to come to you. Locations can be places where people naturally congregate (e.g. a local park or heavily trafficked spaces) so that people who are passing by have the opportunity to participate. • Provide opportunities for participants in SpeakOuts to build on the ideas and comments generated by others. • This method is well-suited for reaching youth.	🟢
Storytelling Conversations and Café Style Table Discussions	Meet community members where they are comfortable for an informal discussion on a project or related topic to initiate a dialogue and encourage relationship building within the community. This helps to gain an understanding of the experiences of groups in neighbourhoods and communities and how their lives are shaped by them. (Tamarack Institute, n.d.	✓	✓				Cost-effective. Great way to initiate relationships and build early trust that can be maintained over the course of a project. Opportunity to hear marginalized voices.	• Should be used in addition to other strategies. • Only a starting point and should be used as a first step. May be able to be incorporated in future steps to maintain relationship(s).	🟡
Summit	An event, typically held over one or two days, that brings together many participants to explore and discuss a chosen issue. Summits can include a range of interactive, collaborative, and deliberative tools and techniques. (Queensland Government, 2017)	✓	✓	✓	✓		Engage a diverse group of community members. An effective strategy to engage youth.	• Incorporate feedback processes, so that the whole group can understand what has been discussed. • Can be expensive to organize. • If a ticketed event, ensure tickets are affordable (include a sliding scale). Inability to pay should not be a barrier for community members to attend. • Selection of engagement techniques incorporated as part of the summit, depends on the purpose of the event, activities that will appeal to the participants, and the budget.	🟢

IAP2 Spectrum (pdf)
With permission from the International Association for Public Participation (IAP2), we've also included a link to the IAP2 Spectrum to provide you with more details on each of the five levels of participation. www.iap2.org.

NOTE: Sources for this toolkit linked to a specific tool are mentioned in the "Description" column. A detailed listing of the sources used to create this matrix can be found in the references list of the Community Engagement Toolkit.

Created by Kitchener Waterloo Community Foundation: May 2022
Rebranded for Waterloo Region Community Foundation: September 2022

260 KING STREET WEST – UNIT 206, KITCHENER, ON N2G 1B6   **WRCF.CA**