Islands 2050 Phase 3
Engagement Strategy

Territorial Acknowledgment

Islands Trust Council acknowledges with respect that the Islands Trust Area is located within the treaty lands and territories of the BOḰEĆEN, Kʼómoks, Ləkwəŋən, Lyackson, MÁLEXEȽ, ʼQualicum, Quwʼutsun Tribes, scəẃaθən məsteyəxw, Sciaʼnew, səlilwətaʔɬ, S ʼ EMYOME, shíshálh, Sḵwx̱wú7mesh, Snaw-naw-as, Snuneymuxw, Spuneʼluxutth, SȾÁUTW̱, Stzʼuminus, ɬaʔəmen, toq qaymıxw, Tsʼuubaa-asatx, Wei Wai Kum, We Wai Kai, WJOȽEȽP, W̱SIḴEM, Xeláltxw, Xwémalhkwu/ʔop qaymıxw, and xwməθkwəyəm. ʼ

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Executive Summary

MODUS Planning, Design and Engagement was hired by the Islands Trust in August 2021, during a pause between Phase 2 and Phase 3 public engagement on the Islands 2050 Policy Statement update project. MODUS was tasked with developing a strategy for the upcoming public engagement phase (Phase 3), and to provide an evaluation of engagement activities undertaken to date. Over several weeks, MODUS conducted a workshop and 1:1 interviews with project staff to inform the understanding of the Islands 2050 process, reviewed background materials and reports, and also conducted a media review of coverage for the project to date.

Key findings and recommendations are summarized within this report. The report begins with a summary of background information including information on the project, engagement principles and objectives, as well as a summary of potential audiences and their key issues. Following, we present an exploration of three scenarios for engagement at three different budgets. With budget and timeline constraints, a recommended scenario is further expanded upon including phasing for engagement tactics and techniques. Finally, a section of engagement evaluation is included including a recommendation that ongoing evaluation take place for this engagement process and future engagement.

The Policy Statement update is guided by a Policy Statement Amendment policy which was approved in 1995 and updated in 1998 and 2016. It sets out the requirements, review inventory, topic review process, amendment process for the Policy Statement update. While a public hearing is not part of this process, public engagement and referrals are as well as three public readings of the Policy Statement Amendment bylaw. The referrals process is currently taking place, and the outcomes and inputs of that process will be considered and honoured in the Policy Statement update as it moves forward.

The Islands Trust Area is situated within the territories of the Coast Salish Peoples. The separate, yet concurrent, engagement process that has been taking place at a government-to-government level with the different First Nations who have traditional and treaty territories in the Trust Area is not part of this review. It is a critically important component of the work being undertaken, and as such preliminary key messages to help with the general public understanding of this process have been drafted and included in the appendix.

What is clear is that the Islands 2050 process has been one that has captured the public's attention. The engagement process started off strong with preliminary conversations about the aspirations and values of constituents. Engagement touch point numbers were higher during the first two phases than any other Trust wide process to date. The process

leveraged digital technologies to increase accessibility, which was very well received across the Trust Areas.

However, the engagement for the Islands 2050 project was challenged in the following ways:

- **Promise to the Public -** Communication about the project phasing and sequencing, including the way public engagement was feeding into this Policy Statement process (how their input would be used) was not as clear as it could have been, resulting in a lack of clarity about how and when public engagement would be used.

- **What We Heard -** Lack of staff resources had compromised the roll out of the original engagement plan, and resulted in missed opportunities to communicate the critically important connection between the values established in the first phase of engagement and the resulting Policy Statement changes. For iterative engagement processes, it is critical that there is a strong report back of 'what we heard', and how that input has informed the next steps in the process to ensure that the project is on the right track. It is important to note that this is a multi-year, regional scale project. Comparable projects often have dedicated internal project management and engagement staff to ensure the project is run efficiently and effectively. These internal staff are often supported with engagement and communications consultants which require a higher project budget.

- **Broadening the Reach -** The Trust serves residents, non-residents and all residents of BC as part of the "preserve and protect" mandate. To date, the Trust has not been collecting information on who has been engaged other than information about age collected during the online survey. In order for this process to be successful, a broader reach of constituents needs to be reached and brought into the conversation– including harder to reach demographics (elders, youth, the unhoused, ethnic minority populations, working families, low income people, LGBTQ2S+ populations and disabled persons) and the silent majority.

It is our recommendation that the process re-calibrate, starting first with clear communications to the public about the pause in the project, and the plan going forward – not just to first reading – but through to project completion including future opportunities for engagement. Given the resources required for a regional scale engagement process, it is recommended that the Islands Trust contract the services of both an engagement and ideally a communications consultant to ensure that this project is properly resourced moving forward. Other recommendations are included within this document.

The Islands 2050 process presents an opportunity to make significant difference on some of the key issues of our time. As such, the process must educate, engage and provide uniquely tailored approaches to ensure meaningful dialogue and also to empower the Islands Trust to make significant and meaningful actions on the key challenges that will face the region over the next thirty years.

Definition of terms used in this report:

• **Stakeholders:** any individual, group, or organization with an interest or stake in the outcome of a decision

• **Public:** those stakeholders who are not typically part of the decision-making entity

WHY IS ISLANDS TRUST ENGAGING?

The purpose of conducting community engagement as part of the Policy Statement review process is:

• To help confirm what residents and stakeholders value about the Islands Trust Area and what their aspirations are for its future (these values were voiced during Phase 1 & 2 engagement activities);
• To gather resident and stakeholder input on key Policy Statement topics;
• To ensure resident and stakeholder values and priorities are heard; and
• To meet or exceed the legislative requirements.

GOALS OF ENGAGING

Through community engagement, Islands Trust aims to engage with a broad range of residents and stakeholders from across the Islands Trust Area, and use the input and feedback they provide to ensure that the Policy Statement reflects the ideas, values and priorities of the community.

WHAT IS ISLANDS TRUST ENGAGING ABOUT?

During Phase 3, Islands Trust is engaging with the public on the draft Policy Statement, and ensuring that the proposed changes reflect their aspirations and values. Islands Trust will clearly communicate the other inputs into the Policy Statement revisions. Islands Trust is not engaging on the governance of the Trust – which is subject to a separate current review process.

Background

Background

Overview of the Islands Trust

Islands Trust is a special-purpose government established in 1974 to preserve and protect over 450 islands and surrounding waters in the Salish Sea. The mandate of Islands Trust (known as the "Islands Trust Object') is to: "preserve and protect the Trust Area and its unique amenities and environment for the benefit of the residents of the Trust Area and of British Columbia, in cooperation with municipalities, regional districts, improvement districts, other persons and organizations, and the government of British Columbia" (Islands Trust Act). This is accomplished through conservation-oriented land use planning and regulation, engagement with First Nations, inter-agency coordination and advocacy, community engagement, and stewardship education.

The Islands Trust Area covers 5200 square kilometers and includes 13 major islands, 450 smaller islands, and is home to 26,000 residents, 10,000 non-resident property owners, and 28,000 Coast Salish People. The region features spectacular beauty, extensive archaeological and culturally important sites, and some of the world's most endangered ecosystems.

Across the Trust Area, there are thirteen local trust areas (LTAs) and Bowen Island Municipality. Each LTA is made up of one major island and a group of smaller islands. Every four years, island residents elect two trustees to represent them on their local trust committee / Bowen Island Municipal Council and the regional Islands Trust Council. Local trust committees and Bowen Island Municipality make decisions about local land use planning and regulation.

Elected local trust committees' and Bowen Island Municipality's decisions on how land and marine areas are zoned and used must respect the preserve and protect mandate. This means that official community plans and land use bylaws in the Trust Area have a strong emphasis on preserving and protecting the unique amenities and environment of the region.

All elected trustees are part of the 26-member Islands Trust Council. As a regional body, Trust Council acts on matters that affect the entire Islands Trust Area, including setting the annual budget; creating and monitoring a Trust-wide Strategic Plan; implementing and amending the Islands Trust Policy Statement; advocating on issues important to the entire region; and engaging with First Nations and other governments, agencies, and organizations to preserve and protect the Trust Area for future generations.

The Islands Trust Policy Statement
As per Section 15 of the Islands Trust Act, Trust Council must adopt, by bylaw, a Policy Statement that "must be a general statement of the policies of the trust council to carry out the object of the trust".

The Policy Statement guides the development of the official community plans and land use bylaws of local trust committees and Bowen Island Municipality and the development of Trust Council's Strategic Plan and advocacy program. It is the heart of the preserve and protect mandate for this special region. Within the Islands Trust Area, regional growth strategies do not apply; instead, official community plans and land use bylaws must be consistent with the Policy Statement. The Policy Statement is approved by the Minister of Municipal Affairs after the Minister is satisfied that the provincial interest and the duty to have early and meaningful consultation with First Nations have been satisfied.

Policy Statement Amendment Project Scope
In 2017, Trust Council assigned the Executive Committee, with involvement from Trust Programs Committee as appropriate, the task of updating the Islands Trust Policy Statement. The Policy Statement has not been substantively updated in over 25 years. In 2019, Trust Council defined three strategic priority areas for Policy Statement amendments - reconciliation, climate change, and affordable housing – in addition to a general update of the Introduction, Part 1, Part 2, and Schedule 1-Definitions. These priorities reflect Trust Council's 2018-2022 Strategic Plan, as well as its Reconciliation Declaration (2019) and Climate Emergency Declaration (2019). Trust Council also directed that the amendment process be informed by First Nations and public engagement processes, as well as feedback from a number of partner agencies and organizations.

Following more than 18 months of Islands 2050 engagement with First Nations and the public, and substantive policy analysis and discussion within Trust Council and its committees, a draft of a new Islands Trust Policy Statement Bylaw No. 183 was presented to a number of Trust Council's committees and the Islands Trust Conservancy Board for early feedback in May/ June 2021. The specific policy changes proposed in the new draft Policy Statement were developed through Trust Programs Committee and Executive Committee, who were informed by Trust Council discussions and resolutions, public engagement since 2019, a discussion paper prepared by staff, and staff advice which was informed by engagement with First Nations. The draft was revised several times in May/June in response to feedback received from Council's committees prior to presenting the draft document to Trust Council.

The draft new Policy Statement was received by Trust Council at its special meeting on July 7-8, 2021. At Trust Council's request, the draft document will now be sent to referral agencies, First Nations and the public for feedback prior to First Reading.

Project Overview

Modus Planning, Design and Engagement were hired by the Islands Trust in August 2021 to help develop an Engagement Strategy for Phase 3 of the Islands 2050 Engagement Process and to provide a review of the engagement process that has happened to date on the Islands 2050 project. A preliminary workshop was held with Islands Trust staff and Modus Planning, Design and Engagement on August 12, 2021 to review stakeholders and issues, the requirements of the Phase 3 Engagement Strategy, to review how audience groups had been engaged to date, understand what had worked well and what could be improved as Islands Trust moves forward into the next Phases of the process.

The deliverable of this project is a three month engagement strategy to guide Phase 3 engagement on the Islands 2050 draft Policy Statement in the 14 regions that make up the Islands Trust. This strategy will include a "base layer" of engagement for all regions, as well as suggestions for island specific strategies. This strategy utilizes an IAP2 (International Association of Public Participation) framework to help guide engagement and the commitment to the public about how their feedback will be used.

Purpose of this Document
The purpose of the engagement strategy is to guide consultation and community engagement during Phase 3 of the Islands 2050 process. The outcomes of the Phase 3 engagement process will inform a revision of the draft Policy Statement in advance of the First Reading of the document by the Trust Council, proposed to take place in March 2022. This plan describes WHAT Islands Trust are engaging upon, WHO Islands Trust will engage with, and HOW Islands Trust will engage with them to meet the objectives of this phase of engagement.

Review of Process to Date

Part of Modus Planning, Design and Engagement's scope is to review the process to date and include recommendations about approaches that may be recalibrated as Islands Trust moves forward into the next Phases of the process. This is included below, and begins with an overview followed by a further description of engagement activities by Phase.

Overview

In March 2019, the Executive Committee of the Islands Trust adopted an engagement plan and project charter to guide the amendment of the Trust Council's Policy Statement. The initial engagement plan for the Islands 2050 project was designed to take place in 7 Phases and launched in September 2019. The objective of the first phase of engagement was to:

1. To receive final adoption by Trust Council of a bylaw amending Introduction, Part I, Part II and Schedule 1 - Definitions sections of the Policy Statement that includes up-to-date information, improved history section and appropriate acknowledgment of First Nations and climate change
2. To improve understanding of the content and function of the Policy Statement
3. To increase awareness and knowledge about Islands Trust and its mandate
4. To promote understanding of Reconciliation and history
5. To develop stronger relationships with First Nations
6. To seek input on long term visions for the Trust Area
7. To gain experience with the Policy Statement amendment process to inform future processes and budget processes.

Engagement Phase 1

This summary was provided in the Draft New Islands Trust Policy Statement - Project Overview Briefing (Updated July 15, 2021).

In Fall 2019, Islands Trust conducted the first phase of the Islands 2050 public engagement process to solicit feedback on priority values and concerns for the Trust Area over the next 30 years. After consulting with local trust committees and Bowen Island Municipality on the engagement methods best suited to their communities, Islands Trust staff hosted 24 events across the Trust Area. They included open house evenings, information booths and collection of feedback in key community locations, information displays and feedback opportunities on ferries, and an online comment and discussion forum using the 'Thought Exchange' platform.

Through online and in-person engagement, the following questions were asked:
- What do you value about the Area?
- In the context of a changing climate, what concerns do you have about the future of the Area?
- What opportunities do you feel will help us preserve and protect the Area?

During the Fall 2019 public engagement process, 557 people attended open houses and information booths, 132 people spoke with staff on ferries, and 149 people browsed displays and materials. 789 people participated on the Thought Exchange online platform providing 1,269 comments and 24,257 ratings of the comments provided.

Following the first phase of public engagement in 2019, staff consolidated the online and in-person feedback into a final report What We Heard - Islands 2050: The Future of the Trust

Area. In July 2020, the "What We Heard" report was posted to the Islands Trust website and shared with email subscribers, advisory group members and First Nations.

Engagement Phase 2

This summary was provided in the Draft New Islands Trust Policy Statement - Project Overview Briefing (Updated July 15, 2021).

In January 2021, in response to requests for more inclusive public engagement, staff added a second phase of public engagement by launching a mid-project Policy Directions Report and online survey that sought ideas and opinions from the public on the themes of climate change and affordable housing (noting that the other defined priority of reconciliation was the subject of a separate process of engagement with First Nations). The public survey was open from January 18 to February 7 and was completed by 406 members of the public who took, on average, 21 minutes to complete with a 97% estimated completion rate. Staff also received 10 e-mail submissions in response to the survey questions.

Trust Council received the consolidated survey results in March 2021 and the results were posted to the Islands Trust website on the surveys and polls page. On March 3, 2021 Islands Trust hosted a Virtual Open House via zoom webinar from 7:00-9:00pm. The event was attended by 108 people, and commenced with an acknowledgment and welcome by Hereditary Chief Bill Williams (Squamish). The webinar was co-hosted by a panel of staff and trustees representing the three Trust Programs Committee working groups on reconciliation, climate change, and affordable housing. Following a short presentation outlining the Policy Directions Report, the panel answered questions.

Promotion of Public Engagement Opportunities:
Staff has promoted engagement opportunities to date through paid advertising in local newspapers, subscriber e-mail messages, social media posts, mail-outs, and the following news releases:

- January 18, 2021: Public Survey about Updating Islands Trust Policy Statement
- July 20, 2020: Islands Trust Releases Islands 2050 What We Heard Report
- September 6, 2019: Islands 2050: The Future of the Trust Area

A dedicated e-mail inbox (islands2050@ islandstrust.bc.ca) has been made available for all Islands 2050 related e-mails. Staff also produced an animated video about the Policy Statement Amendment Project in 2019 that has been widely shared. Additionally, trustees have promoted engagement opportunities through their own e-mail lists and networks.
To promote engagement opportunities during Public Engagement Phase 2, staff sent

out subscriber messages, purchased ads in newspapers (Bowen Island Undercurrent, Gulf Islands Driftwood, Gabriola Sounder, Coast Reporter, Hornby Tribune, and Denman-Hornby Grapevine) and monthly publications (Active Page, Saturna Scribbler, Our Isle and Times, Mayneliner, Pender Post, The Flagstone), and feature online ads on the Salt Spring Exchange and the Bowen Island Undercurrent websites. In addition, staff directly e-mailed non-profit and other island organizations to encourage them to advise their members of the survey opportunity and supported trustees in their efforts to raise awareness. At the request of local trustees, and with their support, staff also arranged for Canada Post to deliver promotional flyers about the engagement opportunities to PO Box addresses on Saturna and Galiano Islands. Social media campaigns on both Facebook and Twitter complemented the print advertising. Through reaching out to organizations on the islands with Facebook and to island-based

Facebook discussion groups, the survey posts were shared throughout the Trust Area. Islands Trust Facebook posts generated a total of 7274 "Reached," 764 "Post Clicks," 338 "Reactions, Comments and Shares"
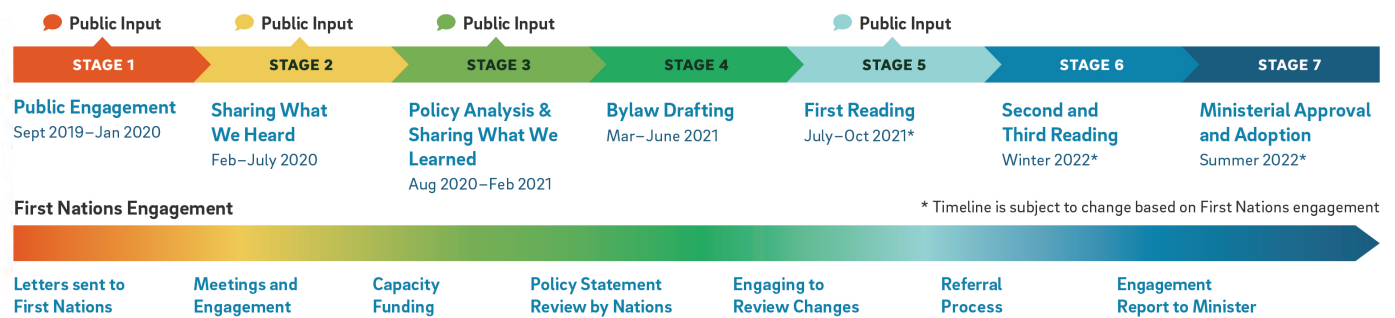
Ongoing Public Correspondence: All public correspondence received at the islands2050@islandstrust.bc.ca portal has been posted to the Islands2050 webpage for Trust Council's consideration, and Trust Council has received 16 delegations and many town hall presentations related to the Policy Statement Amendment Project.

Engagement Phase 3

During the special Trust Council meeting on July 7-8, 2021, Trust Council requested that staff produce a revised project charter for public engagement on the draft new Policy Statement for approval and implementation by the Islands Trust Executive Committee. MODUS Planning, Design and Engagement have been hired to produce an Engagement Strategy for Phase 3 which will be delivered to Islands Trust on August 27th, 2021. Phase 3 was originally planned to be the final phase of proactive engagement for the Islands Trust process. Correspondence and delegations would continue to be received through to the final Stage of the project.

A Note on Project Stages & Phases
The Policy Statement project has been designed in seven stages, which are different than the originally planned three engagement phases. The diagram below depicts how these stages have been communicated to the public. There is an opportunity to improve clarity around how the engagement phases interact with the project stages.

● Public Input	● Public Input	● Public Input		● Public Input		
STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5	STAGE 6	STAGE 7
Public Engagement Sept 2019–Jan 2020	**Sharing What We Heard** Feb–July 2020	**Policy Analysis & Sharing What We Learned** Aug 2020–Feb 2021	**Bylaw Drafting** Mar–June 2021	**First Reading** July–Oct 2021*	**Second and Third Reading** Winter 2022*	**Ministerial Approval and Adoption** Summer 2022*

First Nations Engagement

* Timeline is subject to change based on First Nations engagement

Letters sent to First Nations	**Meetings and Engagement**	**Capacity Funding**	**Policy Statement Review by Nations**	**Engaging to Review Changes**	**Referral Process**	**Engagement Report to Minister**

Proposed Timeline

During the information gathering phase, it was understood that there was Council direction for a first reading in December 2021. With the required procurement process and engagement activities, this timeline is not recommended. This report instead utilizes the proposed timeline for future engagement activities, towards the first reading of the Policy Statement Update. This work takes place under Stage 4 of the project process The Islands Trust has stated that Stage 4 includes *"applying what we learned and drafting a revised new Policy Statement Bylaw. There will be months of public engagement on the draft bylaw as well as feedback from First Nations and referral agencies."*

- August 2021 – Engagement Strategy Development
- September 2021 – Engagement Strategy Approval
- Mid – Late October 2021 – Launch of Phase 3 Engagement Process
- Mid December 2021 – Early January 2022 - Engagement Pause due to holiday season
- End of January 2022 – Engagement Wrapped
- Early February 2022 – Engagement outcomes integrated into the Policy Statement
- March – First Reading

Proposed Future Project Stages:

- Stage 5 is when the revised bylaw (Policy Statement) will go to Trust Council for consideration of first reading in December 2021. NOTE: Based on input, Trust Council may amend the draft new Policy Statement prior to first reading.
- Stage 6 is second reading of the bylaw (Policy Statement) at Trust Council. Council will discuss the bylaw and may make amendments. Then, during the third reading, there will be a final discussion about the bylaw, and possible amendments, before it is approved.
- Stage 7, the Minister of Municipal Affairs will approve the bylaw and Trust Council will adopt the bylaw through fourth reading.
- Throughout the seven stages, Islands Trust is meaningfully engaging with First Nations government and communities through a parallel process.

Target Audiences

The following page provides a breakdown of target audience groups. This list was developed through a participant mapping exercise with Islands Trust staff, in review of previous Islands Trust engagement plans and participants lists, and through a brief online scan. This list is not meant to be exhaustive, but rather a way of tracking potential interested and impacted participant groups. This audience groups list has informed the selection of engagement techniques as appropriate.

LOCAL TRUST AREAS/ BOWEN ISLAND

Local Trust Areas/ Bowen Island
Ballenas-Winchelsea
Bowen
Denman
Gabriola
Galiano
Gambier
Hornby
Lasqueti
Mayne
North Pender
Salt Spring
Saturna
South Pender
Thetis

INDIGENOUS PEOPLES ON THE ISLAND

PARTICIPANT GROUP

Indigenous Peoples on the Islands

GENERAL PUBLIC/OTHER

PARTICIPANT GROUP

Future Generations
Ecosystems
Full-time Residents
Part-time Residents
Visitors
BC Residents
Media

COMMUNITY SERVICES

PARTICIPANT GROUP

Service Clubs
Art Organizations
Welcome Wagon
Food Bank
Community Centres
Health and Social Service Organizations
Churches and Religious Organizations
Emergency responders- Fire Departments and Paramedics
Bike Organizations
Hiking and Outdoor Organizations

INDUSTRY / ECONOMIC INTERESTS

PARTICIPANT GROUP
Forest Lands Interest Groups
Tourism Groups
Agricultural Interest Groups
Agricultural Associations
Chamber of Commerce
Housing Societies
Housing Advocates
Realtors
Marine Groups
Transportation Groups
BC Ferries

ENVIRONMENT AND ACTIVISM

PARTICIPANT GROUP
Conservation organizations
Garden groups
Climate change activists

REGIONAL FORUMS

PARTICIPANT GROUP
Baynes Sound/Lambert Channel Ecosystem Forum
Howe Sound Community Forum
Southern Gulf Islands Forum
Rural Island Economic Partnership
Coastal Douglas-fir Conservation Partnership

GOVERNMENT

PARTICIPANT GROUP
Bowen Island Municipality
Capital Regional District
Comox Valley Regional District
Cowichan Valley Regional District
Metro Vancouver Regional District
Nanaimo Regional District
Sunshine Coast Regional District
qathet Regional District
Regional Districts Directors, Chief Administrative Officers, Directors of Land Use Planning, Communication Directors
Members of the Legislative Assembly
Members of Parliament
Honourable Selina Robinson, Minister of Municipal Affairs and Housing
Ministry of Municipal Affairs and Housing staff
Ministry of Agriculture
Ministry of Energy, Mines and Petroleum Resources
Ministry of Environment and Climate Change Strategy
Ministry of Forest, Lands, Natural Resource Operations and Rural Development
Ministry of Transportation and Infrastructure on Vancouver Island and South Coast
Ministry of Indigenous Relation and Reconciliation (West Coast Office, South Coast Office)
Ministry of Health
Agricultural Land Commission
First Nation Chief and Councils
Environment Canada
Transport Canada
Fisheries and Oceans Canada
Parks Canada
Parks and Recreation

SCHOOL DISTRICTS

PARTICIPANT GROUP
School District No. 45
School District No. 46
School District No. 79
School District No. 68
School District No. 69
School District No. 71
School District No. 64
School District No. 52
School District No. 53

INTERNAL

PARTICIPANT GROUP
Trust Council
Islands Trust trustees
Islands Trust Staff
Executive Committee
Trust Programs Committee
Advisory planning Commissions
Board of Variance
Islands Trust Conservancy
Consultants and contractors
IT Commissions and Advisory Groups

NON-PROFIT CONSERVANCIES

PARTICIPANT GROUP

American Friends of Canadian Conservation

Bowen Island Conservancy

Conservancy Hornby Island

Cowichan Land Trust

Denman Conservancy Association

Gabriola Land and Trails Trust

Galiano Conservation Association

Gambier Island Conservancy

Garry Oak Ecosystems Recovery Team

Garry Oak Meadow Preservation Society

Habitat Acquisition Trust

Keats Island Conservation Group

Lasqueti Island Nature Conservancy

Mayne Island Conservancy Society

Mudge Island Community Society

Nanaimo & Area Land Trust

Nature Conservancy of Canada

Nature Trust of British Columbia

Pender Islands Conservancy Association

Salt Spring Island Conservancy

Salt Spring Island Water Preservation Society

SeaChange Marine Conservation Society

Sunshine Coast Conservation Association

TLC The Land Conservancy of British Columbia

Thetis Island Nature Conservancy

Valdes Island Conservancy

Waterbird Watch Collective

IMPROVEMENT DISTRICTS

PARTICIPANT GROUP
Gabriola (Fire Protection District)
Graham Lake
Schmidt
Galiano Estates
Gossip Island
Montague
Spanish Hills
Wise Island
Bennett Bay (Waterworks District)
Campbell-Bennett Bay
Lighthouse Point (Waterworks District)
Mayne Island
Village Point
Georgina
Razor Point
Trincomali
Harbour View
Mount Belcher
North Salt Spring (Waterworks District)
Piers Island
Salt Spring Island (Fire Protection District)
Secret Island (Waterworks District)
Scott Point (Waterworks District)
Saturna Shores
Vaucroft

Known Audience Issues and Interests

This section contains an analysis of known audience issues and interests. This includes both process and content issues. Process issues include communications, misinformation, limited internal capacity and governance concerns. Specific content issues vary by local trust area, but include concerns about the overarching themes (reconciliation, climate change and affordable housing) as well as more specific concerns (including desalination, docks, and seawalls).

PROCESS
Communications
Public communications—keeping people informed: Some community members expressed concern that there was limited information about engagement opportunities. The level of engagement with the public (based on the IAP2 framework: inform, consult, involve, collaborate, empower) has not been clearly communicated with the community. As a result, the public may not understand what is on and off the table for discussion.

Closing the loop: For some community members, there is a disconnect between public input and the draft Policy Statement. It is unclear how public inputs have been integrated into the policy. Islands Trust staff also expressed the need for a systematic way to ensure all discrete pieces of feedback (written notes, emails, conversations, etc.) are integrated into the policy. There is a need to clearly communicate how public input (as well as technical expertise and First Nations consultation) informs policy.

Depth and timelines of engagement: Community members have expressed concern that the engagement opportunities have been shallow, with limited dialogue. Some are concerned that the process is rushed. Criticism about 'hiding behind' digital platforms (due to COVID-19) also arose, while others celebrated the use of digital platforms.

Concurrent process with First Nations: Some community members are concerned that the process with First Nations lacks transparency. There is limited understanding about how First Nations engagement is weaved together with public input to inform the Policy Statement.

Publicly Circulated Information
Information: Through social media pages (primarily private Facebook groups) and community-led mail outs, the public has started to circulate information about the project. Some of this includes misinformation that the Policy Statement will diminish the commitment to the environment, causes the Islands Trust to work outside its jurisdiction, and/or will lead to less support for healthy and inclusive communities. In addition to this, there are also multiple interpretations about the intent of the document, which has created a misunderstanding of the Policy Statement. There was also misinformation that Trust Council would adopt a new Policy Statement during first reading.

Reactionary communications: By necessity, the Trust has focused communications efforts on responding to public concern and misinformation, as opposed to proactive messaging. This communications tactic takes a toll on internal capacity.

Internal capacity

Resourcing and capacity: Islands Trust staff are at maximum capacity. The team also has limited experience engaging Trust-wide—most engagement occurs at the local level. Further, there are limited resources for engagement efforts. These factors challenge the Trust's ability to consistently communicate with the public.

Governance

Trust Council: Trustees are not aligned in their support for the Policy Statement. Some Trustees are advancing the work through private conversations and individual campaigns. The lack of alignment on Council has influenced the process.

Working groups: Trust Programs Committee members formed working groups to hold discussions on Policy Statement topics without seeking public input and outside public meetings. While their discussion were reported back in detail on public agendas, the information was not otherwise shared with a high degree of transparency.

Governance review: Some community members question if the Trust should exist. If so, there is a question about its role in social issues such as affordable housing. Some suggest these topic areas go beyond the mandate of the Trust. A formal governance review is occurring concurrently to this process.

CONTENT
Some content issues include:
The structure of the Policy Statement
Critique that reconciliation, climate change and affordable housing are not the key themes from engagement, nor are they reflective of the mandate (to protect and preserve).
Concerns about docks, desalination, seawalls, agriculture, forestry, OCP updates, affordable housing

Issues by Trust Area

Local trust areas/Bowen Island face dynamic challenges. Although many concerns are shared, some specific issues vary by area. Overall, Trust Areas have concerns about various topics, including changing ecosystems, water supply, governance, ensuring community resilience and providing essential services.

PHASE ONE ENGAGEMENT RESULTS

The What We Heard Report for Phase 1 of engagement comprehensively summarizes top concerns and interests. This report also highlights the top theme for each Trust Area. The following text is extracted from this 2019 report.

What do you value about the Trust Area?
Top three themes:
Connection to nature *(Salt Spring, Bowen, Saturna, Gabriola, South Bender, North Pender, Galiano)*
Preserve and protect mandate
Planning, policy and governance *(Mayne)*

Other themes include: Rural island culture (Thetis); Community resilience (Denman Island, Hornby); Infrastructure, transportation, and services (Gambier); Biodiversity and species protection (Lasqueti); Food and water security; Local economy and tourism; Affordable housing; Cultural heritage and reconciliation; Safety.

In the context of a changing climate, what concerns do you have for the next 30 years?
Top three themes:
Ecosystem change (Denman, Gambier, Gabriola, Saturna, North Pender)
Water (South Pender)
Land and marine use decision-making (Galiano)

Other themes include: Governance (Lasqueti); Ecosystems protection (Bowen, Salt Spring, Mayne, Thetis); Transportation; Community resilience (Hornby); Food security; Fire risks; Education; Sea level rise; Wood smoke; Economics and employment; Public services; Population; Deforestation and tree cutting; Alternative energy

What opportunities do you see to preserve and protect the Trust Area?
Top three themes:
Advocacy
Climate change
Emergency preparedness

Other themes include: Preserve & protect mandate; Alternative energy and infrastructure; Cultural heritage and reconciliation; Enforcement; Partnerships and program initiatives; Alternative living and community resilience; Forestry, deforestation and tree cutting; Food security; Planning and policy initiatives; Biodiversity and species protection; Economics and employment; Governance; Housing; Water system infrastructure and management; Education and communication.

Risks

There are a number of risks that face this project, and have the potential to further erode trust or derail the project.

- **Staff Capacity** - Islands Trust staff are stretched in terms of capacity and there will be the requirement to lean more heavily on consultants to properly execute the 3rd Phase of public engagement.
- **Timeline** - If Trust Council postponed the first reading of the Policy Statements to March, that means that there is a three month window of opportunity to conduct additional engagement. As a portion of this engagement is around trust building and relationship building - this is a short timeline.
- **Budget** - The budget currently allocated for the Phase 3 budget is low. During the previous engagement Phases, costs were saved through the use of staff resources. These may not be possible when leaning more heavily on consultants - thus the budget will not spread as far as when run and executed by all staff.
- **Expectations** - Expectations from staff and others about the level of engagement that can be expected within a three month time period are high - and the limitations around resourcing need to be factored into what can realistically be achieved. This process will help to begin relationship building and trust building but this will be an ongoing process that will need to be affirmed by future projects and communications. Mismanaged expectations can erode public trust.
- **Misinformation** - During previous rounds of engagement, misinformation spread rampantly on communications channels that Islands Trust is not as active on, or within forums that Islands Trust is not part of. This misinformation has resulted in, or exacerbated, a lack of understanding about the role of the Trust and the purpose of the Policy Statement.
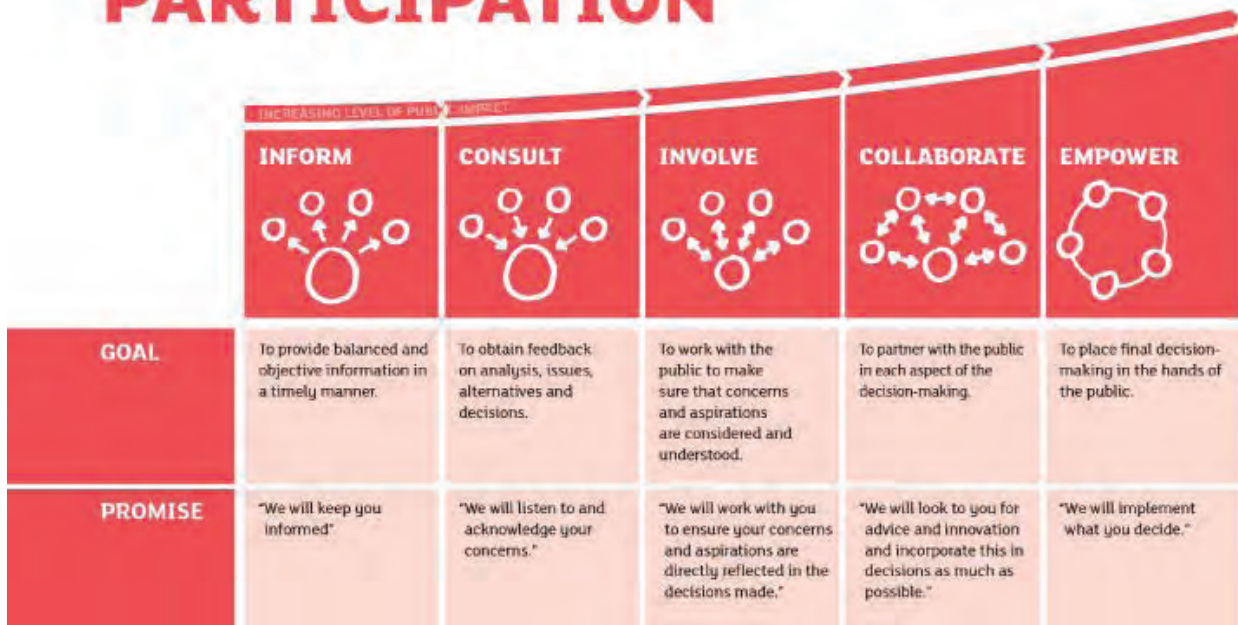
IAP2 Level

This engagement plan will follow the International Association for Public Participation's (IAP2) spectrum of public participation – specifically the inform and consult levels of engagement. A range of approaches will be used to build trusting relationships and inspire meaningful dialogue. Based on the engagement objectives and principles noted above, the proposed approach to engagement is anticipated to span several levels of participation, as classified by the IAP2 Spectrum of Public Participation including:

- Inform – Providing information about the project and planning process.
- Consult – Asking for feedback on guiding principles, proposed ideas or implementation.

Higher levels are not recommended within the context of known budgetary and timeline constraints. With additional budget and staff resourcing, higher levels of engagement along the IAP2 spectrum would be possible to consider.

IAP2 SPECTRUM OF PUBLIC PARTICIPATION

INCREASING LEVEL OF PUBLIC IMPACT

	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
GOAL	To provide balanced and objective information in a timely manner.	To obtain feedback on analysis, issues, alternatives and decisions.	To work with the public to make sure that concerns and aspirations are considered and understood.	To partner with the public in each aspect of the decision-making.	To place final decision-making in the hands of the public.
PROMISE	"We will keep you informed"	"We will listen to and acknowledge your concerns."	"We will work with you to ensure your concerns and aspirations are directly reflected in the decisions made."	"We will look to you for advice and innovation and incorporate this in decisions as much as possible."	"We will implement what you decide."

COVID 19 – Public Participation and Technology

It is anticipated that due to the COVID-19 pandemic, some engagement in this process will occur virtually. Whether online or offline, good engagement follows similar principles. Look to build trust with those that being engaged with, seek to reduce barriers to inclusion and, seek to facilitate meaningful discourse that clearly outlines opportunities for influence.

As part of this (primarily digital) engagement planning process, consider the Five 'A's of Technology Access:

- Availability: to whom is the technology (un)available?
- Affordability: to whom is the technology (un)affordable?
- Awareness: who is (un)aware of the technology?
- Abilities: who has the digital literacies to use the technology?
- Agency: who has the self-efficacy to make use of the technology?

One of the key things that has been underlined throughout this pandemic is the importance of adapting, adopting, and learning. Especially during these times, do not be afraid of examining what is working and what isn't working – and recalibrating as needed.

Engagement Principles

The following principles have been developed for Phase 3 activities and are intended to guide the next phase of the community consultation process. These principles help to build a common reference for how engagement will be approached on this project:

1. **Broaden the Reach** – Provide opportunities for a broader section of the community to participate in dialogue on this project. There will be an emphasis on reaching out to more seldom heard voices and an emphasis on listening to a more diverse viewpoint that represent a broad range of viewpoints.
2. **Diverse Methods** – This plan will use a range of engagement techniques – beyond what the community might already be familiar with – with the intent of facilitating dialogue is not dominated by the loudest voices. These methods will be appropriate to the level of engagement that are committed to for this project.
3. **Well Framed** – Islands Trust will ensure that the questions asked are well framed to ensure that the participant is able to provide input with the proper facts and understanding of the purview of this project and engagement process. Clear and direct language that avoids jargon will be used.
4. **Closing the Loop** – This process will clearly and effectively communicate 'what we have heard' and how this input has been integrated into the Policy Statement update.
5. **Trust Building** – This engagement plan will be rooted in relationship and trust building with residents, non-residents and all residents of British Columbia.

These engagement principles are in addition to the broader Islands Trust guiding principles for public engagement that were in place for Phase 1 and Phase 2 activities:

1. **Inclusive-** Those who are affected by an issue or decision should have an opportunity to influence outcomes and choices. Trust Council will seek information from a broad range of sources in its decision-making processes, recognizing the importance of local knowledge in this regard (Policy Statement)
2. **Open and Authentic –** Input of the public should play a role in the decision-making process. Trust Council believes that open, consultative public participation is vital to effective decision making for the Trust Area (Policy Statement)
3. **Respective of First Nations** – To strengthen relationships with over 30 First Nations in the Trust Area, Trust Council will root all its engagement practices in the spirit of reconciliation.
4. **Diverse** – Decisions are more durable when all participants are aware of the range of interests and needs of everyone involved, including decision makers, surrounding an issue or decision.
5. **Accessible** – Everyone potentially affected by the process has an opportunity to become involved.
6. **Appropriate** – The public engagement process uses one or more discussion formats to reach the identified participants and , where feasible, invites input into the design of the process.
7. **Informed** – Those involved in engagement exercises have the information required to meaningfully participate in the process.
8. **Transparent** – Participants are informed about how their contributions were considered, used and/ or not used.

Objectives

The following are the objectives for Phase 3 public engagement, and ultimately the entire engagement process for the Islands 2050 engagement project:

- To build **relationships and trust** with the key constituents of the Islands Trust

- To engage with a **higher number and broader range** of Islands Trust constituents

- That the Islands Trust community feels that their opinions and voices are reflected in the update – and that **the community feels proud and included in this process**

- To **clearly communicate** about how public input was used throughout this process

- To **honour the concurrent First Nations engagement process** and relationship building

- To ensure that the update to the Policy Statement is a meaningful update that includes strong policy **responses to the key challenges of our time – climate change, affordable housing and reconciliation**

- To increase the **understanding and awareness of the Islands Trust, its mandate and the role that the Policy Statement** plays in the governance structure and network of policies that impact the local trust areas (LTAs)

- To receive **final adoption and public endorsement of the Policy Statement**

Recommendations

Recommendations

- **Be Realistic about Capacity -** As a point of comparison, similar regional efforts are typically staffed with a dedicated engagement team to effectively run the engagement processes. While the Islands 2050 process has seen much higher engagement touch points than any previous Islands Trust process, it has been accomplished through an unrealistic expectation around staffing that is not sustainable. As such, it is recommended to work with an engagement consultant to carry out the engagement through to the end of the project to ensure continuity on subsequent phases of engagement. To ensure that the consultant can be successful, Islands Trust needs to ensure that staff are adequately resourced to work with the consultant. There should be a full-time dedicated staff person for the duration of the project.

- **Expand the Reach** -It is imperative that this process is not just listening to the loudest voices, or those that have organized through lobbying efforts. For this process to be successful, it needs to reach out to seldom heard and consider their input and priorities. Community Groups that have not, as of yet, been engaged should be part of the process.

- **Be Clear on Level of Influence and Report Back -** The promise to the public needs to be clear in terms of their level of influence. There is currently an expectation that public input is the major determining factor in the Policy Statement update. It needs to be clearly communicated that this is one of several inputs - including Working Groups, the Islands Trustee Mandate, First Nations input and technical analysis.

- **Proactive Communications** - This process needs to be active in its communications - in terms of the reason for the Policy Statement update (the project "why"), sharing the outcomes of engagement activities, updating the public on the project timeline and also celebrating major milestones or releases with featured facts. Several strategies are recommended for communications channels, however given staff capacity it is also recommended to bring on an engagement firm with communications experience, or a communications consultant in addition to an engagement consultant to help ensure that information is distributed in a timeline and efficient manner. Communications needs to be proactive in both directions - with monitoring of social media for discussions related to the project occurring on a regular basis.

- **Share "good news" stories** - Further to the proactive communications recommendation - communications needs to share more clearly the positive elements of this process. For example, Islands Trust is demonstrating leadership by taking strong action on reconciliation by looking to address the recommendations of the Truth and Reconciliation Commission (TRC) and United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) within the Policy Statement, in addition to the Islands Trust Reconciliation Declaration.

- **Emphasize Shared Values While Encouraging Consideration of Alternate Viewpoints -** Utilize techniques that encourage empathy and an understanding of differences of perspectives. This can include "walk a mile in their shoes" activities or the use of representative avatars (characters developed to represent the unique demographic makeup of the Islands Trust and encourage the consideration of alternate perspectives in engagement activities). Ensure communications highlight shared values, including communications that include references to shared values with the First Nations and Indigenous populations.

- **Be Strategic** - Keep engagements and communications short, informative and purposeful. Information needs to be distributed in digestible increments.

- **Timeline** - Given the current state of the public's trust in the Islands Trust and the Islands 2050 process, consideration for extending the timeline needs to be given. The question of whether or not the policy review should be concurrent to the governance review also needs to be considered.

- **Budget** - Currently, the Islands Trust has approximately $75,000 to run a concurrent in-person and digital process, with potential travel to 13 Trust Areas and Bowen Island Municipality. This budget typically would include all communications for the project including social media advertising, newspaper advertisements, direct mail, postering etc. With the need for engagement and communications consultants given staff capacity, this budget is low.

Engagement strategy scenarios

Engagement Strategy Scenarios

Given the variables discussed earlier in this report, three engagement scenarios have been explored for Phase 3 engagement to help guide activities moving forward. The scenarios each have different budgetary implications and are intended to let staff and Council weigh the merits of different approaches.

	Scenario 1 – Cost Efficient/ Base Option	Scenario 2 – Broadening the Reach	Scenario 3 – Expanding and Deepening the Conversations
Budget (Includes Communication Budget, Materials, Travel, Speakers Fees and Honorarium)	~$45,000	~$75,000	~$150,000
Timeline	Late September – Late January (earlier start due to lack of consultant procurement process) *No engagement would be run in the three weeks from Dec 15- January 5*	October – Late January *No engagement would be run in the three weeks from Dec 15- January 5*	October – Late January *No engagement would be run in the three weeks from Dec 15- January 5*
Resourcing (Staff)	It is recommended in all scenarios that there is a full-time staff person dedicated for the duration of this project. This person ideally would have strong communications experience.	It is recommended in all scenarios that there is a full-time staff person dedicated for the duration of this project. This person ideally would have strong communications experience.	It is recommended in all scenarios that there is a full-time staff person dedicated for the duration of this project. This person ideally would have strong communications experience.

Resourcing (Engagement Consultants)	N/A Out of budget.	To be brought on at the outset of the project. Approximately $46,000 for the duration. Staff would likely need to lead some of the in-person events due to budgetary constraint as well as take a lead in drafting some of the engagement materials.	To be brought on at the outset of the project. Approximately $100,000 for the duration. This includes a full-time project manager to support the project. All in person events would be consultant led. Consultants would work with dedicated staff person to draft materials, including help with social media which would in the other scenarios be developed by Islands Trust staff.
Resourcing (Communications Consultants)	N/A Out of budget.	N/A Out of budget.	Brought on to support. Approximately 100 hours over the duration of the Phase.
Communication Activities (IAP2 Inform Level) ***Details for Proposed Locations Included Below**	Website Updates (Throughout as needed) Press Releases (3) E-Newsletters (5) Fact Sheets (6) Direct Mail (1) Information Kiosks/ Fairs & Events (~6)* Pop-Ups (8)*	Website Updates (Throughout as needed) Press Releases (3) E-Newsletters (4) Video (1) Fact Sheets (6) Direct Mail (1) Information Kiosks/ Fairs & Events (~6)* Pop-Ups (8)*	Website Update (Throughout as needed) Press Releases (3) E-Newsletters (4) Video (1) Fact Sheets (6) Direct Mail (1) Information Kiosks/ Fairs & Events (~8)* Pop-Ups (8)* Social Media
Engagement Activities (IAP2 Consult Level)	Online Survey	Online Survey Webinar/ Speakers Event Focus Groups (8)	Online Survey Webinar/ Speakers Event Focus Groups (8)
Engagement Activities (IAP2 Involve Level)	N/A Higher levels of IAP2 engagement not possible due to budget and timeline constraints.	N/A Higher levels of IAP2 engagement not possible due to budget and timeline constraints.	Multi-Day Multi-Stakeholder Workshop Using Deliberative Techniques

| Risk | This scenario continues the engagement and communications levels as per Phase 1 and Phase 2. Given the state of public trust in the Islands Trust, and this process – this scenario carries the most risk as it would be the most subject to criticism. Participants may feel that their concerns about the engagement process were not heard or meaningfully responded to. | This scenario improves resourcing challenges, but the budget will constrain the availability of the consultant to be active and leading participants in all recommended activities. However, with improvements to the staff resourcing and the assistance of the engagement consultant – the Islands 2050 process can move forward with more plentiful and varied opportunities to gather input and meaningfully integrate it into the Policy Statement update. However, this budget will not facilitate the use of deliberative or 'involve' techniques within the IAP2 spectrum. | This scenario carried the least risk from the engagement, relationship, and trust building perspective. However, the funding for this option is not currently anticipated, and thus the approval of this scenario would be more challenging. |

*NB: These scenarios have been developed in advance of the selection of an engagement consultant. Once the preferred engagement consultant has been brought on, they will work to finalize and refine the methodology to suit their proposed team and particular skill sets.

Recommended Scenario

The recommended scenario is Scenario 2, understanding that it is the most feasible from a funding perspective. This scenario builds upon the techniques used within Phase 1 & 2 but seeks to expand the reach and incorporate the voices of the harder to reach demographics. This scenario provides the Islands Trust staff with additional support through the inclusion of an engagement consultant who can help to design and facilitate engagement events as well as ensure that the outcomes of engagement are reported out to the public. However, it is recommended that a full time Islands Trust staff be dedicated to this project as there is an incredible amount of nuance and specialized knowledge needed to craft the engagement materials well – including the fact sheets, website updates, pop up materials etc. It will require the continuous involvement of Islands Trust staff to ensure that these materials are developed and approved within the time frame towards a first reading.

Within the context of other planning initiatives, the Ganges Village Area Plan has a budget of approximately $75,000 for engagement and communications. Another example of an Island Trust process is The Fresh Water Strategy, which had no public engagement component but rather an internal process with panels and Indigenous Knowledge Keepers, and had a budget of $90,000. Regional scale projects with rich public engagement processes would have higher budgeting and resourcing.

Note: Deliberative techniques have been of interest by trustee members for Phase 3 engagement. While these techniques could be helpful (they are particularly helpful with geographically diverse populations and contentious topics) – given timeline, resourcing, and budgetary constraints, we do not recommend this technique in scenario 2.

Recommended Scenario Phasing

The following section outlines the recommended phasing and frequency of engagement activities for the preferred Scenario 2. As stated above, this is subject to refinement and change once the preferred engagement consultant is brought on.

Activity	In Person or Virtual	IAP2 Level	Frequency	Timing	Resources Needed
Website Updates	Virtual	Inform	To be updated at the outset of Phase 3 to update the public on the launch of the new engagement, inform on opportunities to get involved and make a clear commitment about how the input received during this phase will be received.	October and throughout	Islands Trust staff to work with engagement consultant to develop content.
Press Releases (3)	Virtual	Inform	1. To be released at the launch of Phase 3 2. To be released in advance of the Speakers Event. Reporting on what we have heard to date as well as future opportunities to be involved. 3. To be released at the close of Phase 3 to report back on key themes and how these will be integrated into the Policy Statement. Clear information on next steps will be part of this release.	September October January	Islands Trust staff to work with engagement consultant to develop content.

E-Newsletter (4)	Virtual	Inform	To be released monthly to provide consistent updates on the project.	Each month	Islands Trust staff to work with engagement consultant to develop content.
Video	Virtual	Inform	One video, to commence production in early October. Producing the video(s) involves multiple stages: Creative Development & Pre-Production Production: live action filming or animation production Post-Production: editing, animation, sound design, titles and colour grading. The intention would be for this video to be used throughout Phase 3, so production would need to begin ASAP in October once the preferred consultant has been selected. The video will be used on the project website, and social media channels.	Early October Commence Production	Islands Trust communications staff, engagement consultant/ video production team.
Fact Sheets	Virtual and In Person (printed copies at pop ups and info-rmation kiosks)	Inform	To commence production in early October. This budget includes space for approximately 6 fact sheets, to be developed around the central themes of the policy statement and any other key engagement themes. Ideally, these are produced towards the outset of Phase 3 so that they can be used online and at subsequent engagement events.	Early October	Islands Trust staff to work with engagement consultant to develop content.

Information Kiosks/Fairs & Events	In Person	Inform	We have assumed within Scenario 2 approximately six information booths to be held at pre-planned events throughout the Islands Trust Area. These will include information panels, the fact sheets and opportunities for input (with either the online survey as internet connectivity allows or printed versions of the survey). The six events will be selected when the workplan is being further refined but might include the Saturday Salt Spring Market, the Bowen Islands Farmers Market or Winter Market, the Denman Island Farmers Market, or the Galiano Blackberry Tea & Pie Festival.	October, November, Early December	Islands Trust staff to work with engagement consultant to develop information boards, fact sheets etc.
Pop-Ups	In Person	Inform and Consult	We have proposed approximately eight pop-ups. These will be held at high traffic locations and locations where we might access harder to reach populations. This might include Royal Canadian Legion 92 (Salt Spring), Royal Canadian Legion 150 (Bowen), School Bus Boats, Ferry Terminals, (working with Salt Spring Island Community Services to target at risk youth, for example.	October, November, Early December	Islands Trust staff to work with engagement consultant to develop interactive panels etc.
Online Survey*	Virtual	Consult	One online survey will be developed throughout this phase to enable participation by those who are unable to attend in person events.	October/ Early November to Mid -December	Islands Trust staff to work with engagement consultant to design survey.

Webinar/ Speakers Event	Virtual	Inform and Consult	The Webinar/ Speakers Event is imagined as one of the keystone events for this phase of engagement. A group of experts will be brought together to discuss the implications of climate change, reconciliation, and housing affordability in the coastal context. There will be an opportunity for questions and discussion at the end. Given the current COVID-19 situation, this will likely take place over Zoom, which will allow broader geographic participation.	November	Islands Trust staff to work with engagement consultant.
Focus Groups	Virtual	Consult	Throughout this process we propose series of Focus Groups. These interviews allow in depth exploration of nuanced issues of community groups, advocacy organizations etc. Approximately eight are proposed during this phase.	Throughout Phase 3	Islands Trust staff to work with engagement consultant to develop interactive panels etc. Staffed by consultants.
Staff, Trust Council Information Sessions, Local Trust Committee/ Bowen Island Briefings	In Person or Virtual	Inform	One kick-off information for each group, at the outset of Phase 3.	Late September Briefings throughout	Kick off to be led by consultants to introduce process, phasing and key messaging. Subsequent meetings likely to be presented by staff.

*January will primarily be a month for reporting back what was heard during the Phase 3 engagement opportunities and ensuring that we heard participants feedback correctly before the feedback is integrated into the revised Policy Statement.

*In Person Events – We have estimated approximately 14 in-person events for the duration of this process. We note that due to the COVID-19 situation, these events may need to move to digital events. We have made some preliminary recommendations about where these might occur, but the preferred consultant will work with the Islands Trust staff and trustees to determine and confirm the best locations for in-person events.

Engagement tools and techniques

Engagement Tools and Techniques

This engagement strategy sets forth tactics for both "Trust-Wide" and Island Specific Engagement tools and techniques. Island specific techniques should address the specific needs of each community, and should seek to reach some of the harder to reach demographics. This section includes a preliminary suggested list to target harder to reach audiences as identified within Scenario 2 in the last chapter. As engagement and communications consultants are recommended to undertake Phase 3 of public engagement, it may be further refined and built upon by these consultants due to any changes in the project. An engagement toolkit, which outlines a variety of other potential techniques, has been included as an appendix and is organized by the following categories:

1. Communicating Tools
2. Group Input Tools
3. Individual Input Tools

The following table outlines the proposed digital and in-person techniques for engagement at the inform and consult level for Phase 3 of the Islands 2050 process. The inclusion of digital techniques is important as it makes provision for uncertainty surrounding COVID-19 and also an enthusiasm for this approach by the Islands Trust population.

IAP2 Level	Digital	In-Person
Inform	Website Updates Press Releases E-Newsletters Info-graphics/video Fact Sheets	Information Kiosks/ Fairs & Events Pop Ups Staff and Trustee Briefings
Consult	Online survey Webinar w/input opportunities Focus Groups	Tailored In-person Events for each LTA* Direct Mail

NB: For the Tailored In-person events for each LTA, the engagement consultant should work with Islands Trust staff and Trustees to determine which LTAs will be targets and which of the recommended techniques will be selected. Islands Trust staff has previously consulted with the LTAs to determine their preference in engagement techniques in 2019 and those preferences will also inform the selection of in-person events for Phase 3.

Trust Wide

Fact Sheets

Category: Communicating Tool
Cost: Low

Fact Sheets or Information sheets are techniques for sharing information on specific topics, and responding to recurring questions or themes. They are useful for ensuring that there is good access to information, but are passive in their ability to respond to subsequent questions. They are best combined with other techniques, techniques with opportunities for questioning and conversation. It is suggested that Fact Sheets for this project can include the following:
* What did we hear?
* How did we use that input?
* What is our jurisdiction for this topic?
* What are other jurisdictions doing in this area?

Objective: Provide reliable and consistent information to residents, non-residents, and all residents of BC.

Press Releases

Category: Communicating Tool
Cost: Low

Press releases help get the word out about the project, key milestones and opportunities for input. They should be released in advance of key engagement events to increase awareness about the events. They can also be used to share the 'good news' of the project - such as innovation or leadership in certain areas.

Objective: Increase and broaden awareness.

E-Newsletters

Category: Communicating Tool
Cost: Low

For folks who have registered their contact information, a monthly newsletter from the Islands Trust (signed by the CAO or another representative) should be distributed to provide timeline updates as the process progresses. This helps to create a consistency around updates, as well as a more personal relationship with the Islands Trust.

Objective: Provide timely and consistent updates on the Policy Statement process, as well as create a more personal relationship with the Trust itself.

Info-Graphics/ Videos

Category: Communicating Tool
Cost: Medium

Videos, such as the Islands 2050 - The Future of the Trust Area video, are helpful techniques to distribute information in a digestible format - especially over social media. This video should include information that was included within the first video, but should also include information on the process, the engagement to date and how the input gathered from the Phase 1 and 2 of engagement has been used to inform the development of the Policy Statement.

Objective: To provide digestible, informative communications to explore central themes in the Policy Statement.

Project Website

Category: Communicating Tool
Cost: Low

The Islands 2050 website is an important project information communications channel - which should be updated regularly with clear information about the project process, engagement activities and outcomes.

Objective: Create and maintain a "home-base" for project information that is consistently updated.

Online Survey

Category: Individual Input Tool
Cost: Medium

Opt-in surveys or questionnaires are useful tools to collect data, gather opinions on options, and gauge support for the process. They can also provide a snapshot of opinions, across a wide range of demographic groups. It is important to note that they may not be statistically-valid. But, if enough people participate and demographic information is captured, the results can be weighted to be a representative sample.

Surveys can be used at essentially any point during the engagement process. They are useful at the beginning of the process to identify initial issues and opportunities, in the middle of the process to assess options or, near the end of the process to help with final decisions and to ask for feedback on the engagement process.
For Phase 3 of Islands 2050, a survey would need to be carefully designed with clear communication about how the inputs gathered in the survey would be used in the Policy Statement Update.

Objective: To gather values, test options or to help with final decisions.

Webinar
Category: Communicating Tool
Cost: Medium

A webinar is an online presentation to scores or hundreds of people and ask for input. It allows for speakers from many places to present and for participants to ask questions. Testing the software and presentations before you go live is very important. This technique could be very effective as a "deep-dive" into the three central themes of the Policy Statement update as well as central themes that emerged from the Phase 1 and 2 engagement. It is an opportunity to demonstrate the interconnectedness of these themes to the mandate of the Islands Trust and the values that were gathered through earlier stages of engagement.

Objective: To provide an opportunity to provide in-depth and expert information on key themes as well as gather feedback from the public.

Direct Mail
Category: Communicating Tool
Cost: Medium

Direct Mailings can help to reach audiences who might not find out about the process or engagement opportunities through other channels. They are particularly useful in wide geographic areas such as the Islands Trust.

Objective: Increase and broaden awareness.

Focus Groups
Category: Individual Input Tool
Cost: Medium

A small-group facilitated discussion used to gauge public opinion on a given topic or issue. Focus groups involve a carefully selected group of individuals who either have a specific knowledge base and interest in a topic, or randomly selected residents who are seen as representative of the general public

Objective: To build trust and relationships and to offer an opportunity for participants to voice their concerns and issues.

Island Specific

Information Kiosks/ Fairs & Events
Category: Communicating Tool
Cost: Medium

Find out which community events are most popular in your study area and what is required to have a booth at those events. Community event booths are a great way to let people know about your process, sign them up to your email list, answer questions, and get some early input on the issues that matter to them the most.

Objective: To provide visibility and information for the project, as well as the Islands Trust more generally.

Pop-Ups
Category: Communicating Tool
Cost: Medium

Roadshows and pop-up tents take engagement activities to the public. These can include the same sort of engagement activities as other events, but can also be more playful in nature. Previous pop-ups on BC Ferries were successful. Opportunities to reach more hard to reach demographics should be explored through pop-ups at legions, seniors centres, school boats etc. In addition to providing information, pop up materials should provide an opportunity to provide input.

Objective: To provide visibility and information for the project, as well as gather input.

Tailored In-Person Events for Each LTA
Category: Group Input Opportunity
Cost: High

For certain LTAs, specific and tailored in person events will be required. Depending on population sizes, these may be open houses or talking circles. In all instances, the events should provide an opportunity for "information out" and "information in", allowing opportunities for in depth discussions on the particular issues and concerns of the LTA. These will be imaginative, fun and trust building opportunities.

Objective: To reach out to each LTA and allow them an opportunity to provide nuances and specific input from the perspective of their community.

Other

Trust Council Information Sessions

Islands Trust Council is composed of 24 elected local trustees and 2 municipal trustees. Throughout this process, the trustees have conducted individual engagement sessions with constituents of the Islands Trust. It is recommended that an Information Session be held with trustees in advance of the third phase of engagement to give consistent information, and to help answer some of the key questions that are anticipated to arise during this phase.

Not Recommended

Town Halls

Town Halls are events where a main presenter is followed by speakers/ questions from the community. Town Halls often become dominated by the loudest voices and often do not result in meaningful conversations.

	Local Trust Areas	Harder to Reach Demographics	Indigenous Peoples on the Islands	General Public	Community Services	Industry/ Economic Interests	Environmental	Regional Forums	Government	School Districts	Internal	Non-Profit & Conservancies	Improvement Districts
Fact Sheets	X	X	X	X	X	X	X	X	X	X	X	X	X
Press Releases	X	X	X	X	X	X	X	X	X	X	X	X	X
E-Newsletters	X	X	X	X	X	X	X	X	X	X	X	X	X
Info-Graphics/ Videos	X	X	X	X	X	X	X	X	X	X	X	X	X
Project Website	X	X	X	X	X	X	X	X	X	X	X	X	X
Online Survey	X	X	X	X	X	X	X	X	X	X	X	X	X
Webinar	X	X	X	X	X	X	X	X	X	X	X	X	X
Direct Mail	X	X	X	X	X	X	X	X	X	X	X	X	X
Focus Groups		X			X	X	X	X	X			X	
Information Kiosks/ Fairs & Events	X	X		X									
Pop-Ups	X	X		X	X								
Tailored In Person Events	X	X											
Trust Council and Staff Information Sessions											X		

NB: For the Focus Groups, there are seven audience groups marked, while only six sessions included within the ballpark costing. It may be possible to consolidate certain audience groups to ensure sessions that target harder to reach demographics. For the harder to reach demographics, it would be preferred to run the focus group sessions in person.

Evaluation plan

Evaluation Plan

Monitoring and evaluating are an important part of any engagement process, enabling improvement and recalibration as needed. Throughout this project engagement tactics and outcomes will be continually monitored against the stated objectives.

What will Islands Trust monitor and evaluate?

- Number of participants reached through the variety of different engagement opportunities provided
- Representation of engagement participation by gender, age, and ethno-cultural qualities
- Geographic distribution of engagement participation
- Satisfaction with outreach and variety of engagement opportunities
- Breadth, depth, and relevance of input and feedback received
- Public and Council endorsement of the final Policy Statement

Appendices

Appendices

Previously Engaged Audiences

PHASE 1 ENGAGEMENT

Through Phase 1, Islands Trust carried out 16 days of events across 21 Trust Areas. These included 11 Open Houses, 5 Vision Booths, and 7 BC Ferries days. In total, there were 557 public event attendees and 132 conversations on BC Ferries (with 149 views of display materials). An online discussion forum through Thought Exchange generated 24,257 ratings on comments by 789 participants.

The table below shows a breakdown of outreach and engagement tactics and participation rates by Islands Trust Area.

PHASE 2 ENGAGEMENT

Audience	Outreach Tactics	Engagement Tactics	Participation
All Trust Area	Newspaper ads, Subscriber emails, Social Media Posts, Mail-Outs, News Release	Public survey (January 18 - February 7, 2021)	406 Responses (97% completion rate)
All Trust Area	Newspaper ads, Subscriber emails, Social Media Posts, Mail-Outs	Project email	10 Email submissions
All Trust Area	Newspaper ads, Subscriber emails, Social Media Posts, Mail-Outs	Virtual Open House (March 3, 2021)	108 Event participants

Note in addition to targeted promotion through Phase 1 and Phase 2, Islands Trusts carried out promotion for all engagement via the Islands 2050: The Future of the Trust Area Whiteboard Animated Video and Facebook Ad, Website Landing Page Pop Up, Website Event page, Project Page.

Proposed Key Messages

The following are proposed key messages that can be used throughout Phase 3 activities:

- The Islands Trust is a Provincial entity, governed by the *Islands Trust Act*, with a mandate to preserve and protect the islands Trust Area for residents, non-residents and all residents of BC.

- This is an important moment for the Islands Trust and the Islands Trust Region. The Policy Statement was last substantially updated 25 years ago. The Trust is updating its approach to respond to and reflect the challenges of our time. Composed of coastal communities, the Islands Trust needs to be on the front lines of responding to climate change and its impacts.

- The three key Policy Statement themes of reconciliation, climate change, and affordable housing were directed, in part, by council and represent the most significant challenges of our time - challenges that necessitate a cross jurisdictional approach. The Trust is operating within its authority and responsibility by meaningfully integrating these into the Policy Statement.

- This is the first time that the Islands Trust has had meaningful government to government engagement with First Nations within the Islands Trust Area on policy that is centered in reconciliation. First Nations engagement and consultation was ignored in the 1994 Policy Statement 1994 Policy Statement, causing harm to Indigenous People. The inclusion of reconciliation as a central theme is in direct response to the TRC Calls to Action and UNDRIP.

- The feedback that Islands Trust receives from the public is an important input into the Policy Statement. It is one of several inputs and is woven together with First Nations direction, technical analysis and understanding, and Council direction to inform the Policy Statement update.

- During the first and second phases of engagement, Islands Trust were able to engage with more individuals than any of the Islands Trust's past Trust-wide processes. Islands Trust looks forward to working to continue to increase these numbers and continue leveraging online platforms to reach people who might not be otherwise able to attend in-person events.

- Islands Trust paused the project to allow more opportunities for residents, non-residents and all BC residents to provide their input into this process.

- The input gathered during Phase 3 will inform the revision of the Policy Statement before first reading.

Reconciliation and First Nations Engagement

The Islands Trust Area is situated within the territories of the Coast Salish Peoples and sits at the centre of the many gathering places and villages of these strong and vibrant First Nations. Respect for this place inspires us to celebrate the richness of Coast Salish history, knowledge, and culture and informs the work that Islands Trust does. Since 2015, Islands Trust Council has committed to the principles of reconciliation.

Islands Trust Council recognizes that reconciliation is fundamental to building meaningful relationships now and into the future, and the work of reconciliation is key to understanding shared history and preserving and protecting the Trust Area for generations to come.

During the Policy Statement update, a separate, yet concurrent, engagement process has been taking place at a government-to-government level with the different Nations. The following are some key messages for the broader public that can be helped to frame the separate First Nations engagement process and set expectations.

Key Messages

- For millennia, Coast Salish peoples have lived on and stewarded the islands and waters of the Salish Sea.

- Colonization led to the death, displacement, and dispossession of Indigenous peoples through disease, residential schools, the Indian Act, the reserve system, and more.

- Nonetheless, First Nations have constitutionally protected legal rights and title that relate to land governance over the Salish Sea islands.

- In fact, 30 First Nations have traditional and treaty territories in the Trust Area representing 28,000 Coast Salish peoples.

- With these rights come responsibilities—to the lands, waters, ancestors, traditional knowledge passed on from generation to generation, and to the ecological systems that bind it all together.

- Since 1994, when the last Islands Trust Policy Statement was adopted, much has changed in the Islands Trust's understanding of and commitments to First Nations Rights & Title.

- Recently, British Columbia was the first province in Canada to enact legislation to implement the United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP).

- Local governments in BC and the Islands Trust are now working to integrate UNDRIP in their governance systems, engagement processes, plans, strategies, and policies.

- The Islands Trust is one of the first jurisdictions in BC to enact a Reconciliation Action Plan informed by the Truth & Reconciliation Commission's Call to Action.

- The 2019 Reconciliation Action Plan, unanimously passed by the Islands Trust Council, includes action 3.1 Policy Statement and Islands Trust Act which calls for: "development of an engagement process and implementation to create an inclusive Policy Statement and Islands Trust Act that is reflective of history, acknowledgment, and reconciliation".

- Islands 2050 is an opportunity to establish a true commitment to reconciliation in the Trust's Policy Statement, begin to address UNDRIP, and build a relationship founded on trust and respect with First Nations.

- Building this relationship requires significant government-to-government dialogue and the assurance that inputs from First Nations are treated by the Islands Trust with respectful consideration and honour.

- Consequently, the contributions of First Nations to the renewal of the Policy Statement are considered separate from the public engagement stream, and will not be subject to public review. ("The Weave" diagram).

- Overviews of inputs and comments from First Nations will be provided in a report

- Through the Islands 2050 project and a parallel First Nations engagement process, the Trust will strive to underline common values and points of convergence between public feedback and First Nation interests.

- The Trust hopes to build strong relationships with diverse Coast Salish communities who have rights and title in the area, form a common vision, and build a future that re-establishes a more prominent Coast Salish presence on the Islands. The TRC Call to Action 47 calls for all levels of government to repudiate concepts used to justify European sovereignty over Indigenous peoples and lands, such as the Doctrine of Discovery and terra nullius, and to reform those laws, government policies, and litigation strategies that continue to rely on such concepts

Key Messages on Jurisdiction

- **Reconciliation** — The Truth & Reconciliation Commission's Calls to Action include several points relevant to local jurisdictions. These actions speak to repudiating concepts including "terra nullius" which wrongly propose Indigenous peoples were not present on the land or were not making use of the land when European settlers arrived. Moreover, reconciliation is not limited to a specific jurisdiction. It is also a call for all non-Indigenous Canadians to consider how they have benefited from colonialism, and the displacement and dispossession of Indigenous peoples.

- **Cultural Heritage** — The Islands are home to significant cultural sites including village sites, middens, petroglyphs, pictographs, clam gardens, fish weirs, canoe landings, culturally modified trees, rock shelters, ancestral resting places and graves, burial cairns, tools, and cultural objects dating back over 10,000 years. While the Province's archaeological branch holds some jurisdiction over the protection of cultural heritage, local areas are provided tools to protect and celebrate these important features, many of which are profoundly and inextricably linked to the ecological richness of the Trust Area. In fact, in 1994 amendments to the Islands Trust Act included new powers to engage in "activities to gain knowledge about the history and heritage of the Trust Area and to increase public awareness, understanding and appreciation of the history and heritage" and to "conserve heritage property".

- **Ecological Health & Conservancy** — For over 10,000 years Indigenous people have tended to the lands and waters of the Trust Area, and lived sustainably with its many resources. The relationship between Indigenous communities and the ecological systems that shape the Islands is deep rooted and essential to successful stewardship efforts. In comparison to under 50 years of Islands Trust governance, there is much to learn about the area and its rich biodiversity from Indigenous communities. Within the context of the climate crisis and the growing threat of habitat loss, shoreline erosion, wildfires, droughts, and more, working together towards ecosystem and community resilience is key.

- **Affordable Housing** — Many Island communities are facing a shortage of safe, secure, and affordable housing. As the Islands Trust is responsible for land use, it has a role to play in relation to the types, forms, and densities of housing that are permitted, and the approval of residential development proposals. Development patterns of the past have emphasized larger lots with single detached dwellings. These types of homes are out of reach for most families and low to middle income earners. Additionally, more compact and affordable forms of housing use the limited lands available for housing more effectively. By focusing planning efforts and land use policies on affordable residential development, the Trust can:
  - reduce sprawl that chips away at agricultural and natural lands;
  - ensure new housing is more efficient and low-carbon;
  - support local businesses that rely on service workers to keep communities economically resilient; and,
  - reduce instances of homelessness, land squatting, overcrowding, and illegal suites.

DIGITAL ENGAGEMENT TOOLS & SUPPLIERS

A Curated List - Version 2

MODUS

from insight to impact
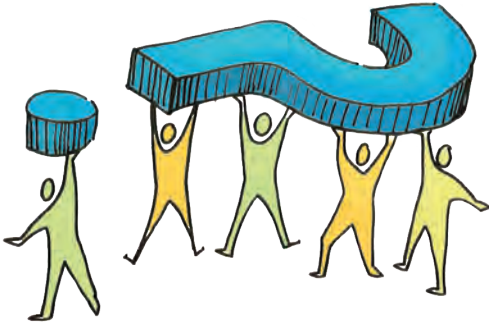
At the heart of the community and stakeholder engagement work MODUS does is a firm commitment to respectful discussion and exploration with all participants, no matter how "hot" the issue or context.

We love doing this challenging and creative work across a wide set of sectors, and have developed a full and unique practice, with our own terms/definitions, guiding principles, core practices, integrative imagery, and a range of tools. The public-serving organizations and private companies we work with help us to apply and hone these skills, tools and processes. We are always learning.

We call our approach **strong engagement**, hold ourselves to a high standard in all our projects, and teach/train others to work in a similar way. We enjoy using engagement to "figure things out together" with diverse audiences, and have named ourselves MODUS to emphasize good process as critical to the range of products we help create.

Now that the engagement "context" we work in has changed so much (and in such a short time) due to Covid-19, we are challenged to keep up high standards and to ensure effective engagement by using more digital tools more often. While paying attention to the challenges that some people and groups will have because of this shift, and to different dynamics and needs online, we are committed to doing it well. And to helping other practitioners and participants in the engagement field "figure it all out" as well.

Dear friends/colleagues,

In this challenging time, having observed so many tragedies due to the Covid-19 pandemic, the entire MODUS team wishes you and yours the very best of health and safety. We recognize and accept that many of our and your past priorities have changed and will continue to change, both now and for the long-term.

Nevertheless, we also know that engagement will and must continue, perhaps (likely?) focusing on some of the health, economic and social challenges and opportunities that this crisis has allowed and forced us to face. We believe in both individual and collective contributions and solutions to common challenges, and see good engagement contributing to the best possible future for all of us and our communities.

MODUS also wants to help our clients and colleagues (and the diverse communities we work, serve and live in) to get through this as well as possible, and have tried to find ways to make positive contributions. One thing we have done is conceptualize, develop and share this document as widely as possible, with positive feedback from all quarters so far on its first version.

You are encouraged to use this document as you wish, and to send comments and criticisms so that we can make it better. We hope this version is useful to you, is easy on the eyes, and is self-explanatory and easy to use. We will say that it is a carefully curated listing and explanation of engagement activities that we often do in-person, but which can also be done online.

That was our main purpose: to identify and list the kind of activities we use to engage people around critical issues effectively, and to add suggested suppliers and platforms for doing this well online. Each row is organized around a type of activity we believe in, and the suppliers for each are simply listed alphabetically (noting that the italicized suppliers are those we have added since v1).

We would be very happy to hear about additional tools, additional suppliers, and even additional rows that you think would add value to this document. We do not know all the tools we have listed inside-out, and we do not have all the tools or all the answers.

However, the materials provided here should help you more quickly find and deliver good solutions in your work and in your communities, when you judge that the time and conditions are right.

One aspect of the following table that needs explaining is the coding Re: "when you should use this tool" in an engagement process. MODUS knows that some tools are better suited to earlier and broader activities, while others are more suited to the more technical (deep-dive, creative, and/or directional or decisional) stages that come later in a process.

We have therefore indicated when we think a specific row/tool is best suited for use.

We have also coded each row/tool according to whether it falls into what MODUS calls the "input zone" or the "engagement zone" of the public participation continuum, which was itself developed and publicized by the International Association for Public Participation (IAP2).

We are happy to share more details on the zones with you, but our work has shown that when you are "informing" or "consulting" in a process, you are supporting an input-focused process with less influence for participants. Nothing at all wrong with that, but the engagement zone is where efforts to more substantively "involve" and/or "collaborate" with participants properly land.

Finally, this is a living document that needs your comments and suggestions. MODUS will produce a version three, and so we really need to tap into your ideas and experience. If you can suggest an additional row, please do so. If you are a supplier who wants to have your tool added, let us know where and why. If you are a client or practitioner who can suggest an improvement or addition, please do so. We will promise to find a way to credit you in future versions.

Thank you very much, enjoy the tool, and stay safe and healthy please.

**Most sincerely,
from your friends and colleagues at MODUS.**

Produced by the MODUS Digital Engagement Team, made up of Mackenzie Fleming (Junior Engagement Specialist), Sarah Gillett (Senior Engagement Specialist), Michael Meyer (Engagement Specialist), Athulya Pulimood (Marketing & Learning Specialist), and Vince Verlaan (Principal; Engagement, Facilitation & Training Specialist).

MODUS
from insight to impact

1 — INFORMATION / ISSUE PAPERS

Prepared by a project team member, and often used to kickstart public awareness and input, these short papers provide needed background information for the general public. Often finishes with focus questions and reference to a questionnaire. Helps develop informed opinions through text, photo galleries, infographics, videos or other content. Leads to/supports other engagement activities.

EARLY   MID   LATE

→ INPUT ZONE

SUPPLIERS:

Link to your project website, or use engagement suites like Bang the Table, CitizenLab, Civil Space

2 — DISCUSSION FORUMS

Users create new topics for discussion, comment on existing topics, reply to other people's comments, moderate other users' input, and/or direct message to other users. Forum content can be visible to everyone or just to registered users.

EARLY   MID   LATE

→ INPUT ZONE

SUPPLIERS:

Bang the Table, *Civil Space*, Forumbee, Reddit, *Social PinPoint*

3 — ISSUE RANKING

A carefully scoped list of key issues or trends to address, and participants rank them in terms of importance. Participants can be asked the reasons for their choices, and/or to suggest other key issues or trends.

EARLY   MID   LATE

⤢ ENGAGEMENT ZONE

SUPPLIERS:

Bang The Table, *CitizenLab, Civil Space*, Google Forms, MetroQuest, *Simple Survey, Survey Gizmo,* Survey Monkey
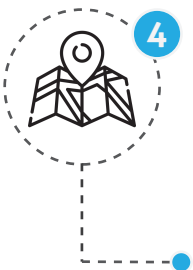
4 — COMMUNITY MAPPING

A map of the community or project setting, and questions which ask participants to identify important features on the map (e.g., things to protect or enhance, challenges to address or fix). Pairing participant comments with customized icons is a legible and effective way to get into more detail.

EARLY   MID   LATE

⤢ ENGAGEMENT ZONE

SUPPLIERS:

Bang The Table, *CitizenLab, Civil Space, Maptionnaire,* MetroQuest, MindMixer, *Neighborland,* PlaceIt, *Social PinPoint*, Wayblaze

5 ★ SMS POLLING & NOTIFICATION

Contact people on their cellphone to conduct polling, raise awareness, solicit donations, or give updates.

EARLY   MID   LATE

→ INPUT ZONE

SUPPLIERS:

Pigeonhole Live, PollEverywhere, PublicInput, Sli.do, Stratcom, Textizen, TextTalkAct

**WHEN MIGHT YOU USE IT &
IN WHAT PARTICIPATION ZONE?**

QUICK POLLS

EARLY   MID   LATE
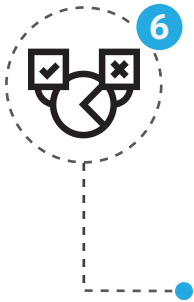
A single question posed to a targeted or broad audience through use of a questionnaire tool, or on social media. Use a simple "yes or no" format for the answer, or ask open-ended questions to gather short statements of participant's greatest hopes and fears (for example). Text entry will require some coding, so it is best to keep the character limit low.
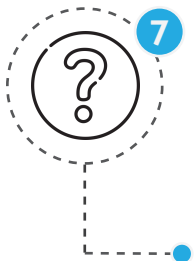
→] INPUT ZONE

SUPPLIERS:

Bang The Table, Google Forms, *Simple Survey, Survey Gizmo*, Survey Monkey, Twitter

QUESTIONNAIRES

EARLY   MID   LATE

Multiple questions are provided for participants to answer in a structured manner. Questionnaires can have a mix of closed-ended and open-ended questions. Available time and resources for activities like analysis and reporting must be considered when designing a questionnaire.

→] INPUT ZONE

SUPPLIERS:

Bang The Table, *CitizenLab, Civil Space*, Google Forms, Konveio, LimeSurvey, MetroQuest, Placespeak, *Social PinPoint,* Survey Gizmo, Survey Monkey

EVENT POLLS

EARLY   MID   LATE

Questions posed live to online participants. Often participants may be asked to rank the responses to crowdsource what the group most values.

→] INPUT ZONE

SUPPLIERS:

Mentimeter, Pidgeonhole Live, Poll Everywhere, Slido, ThoughtExchange
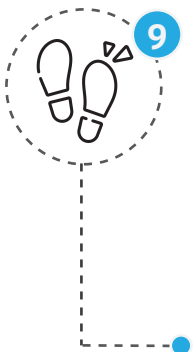
## STORYTELLING / WALK IN MY SHOES

EARLY   MID   LATE

"Step outside" of personal perspectives or needs to consider the challenges that others face, cultivate empathy, and think of ways that the project could address those challenges. Participants first read a brief profile of a fictional person, then respond to a project question based on that profile. Some platforms have played with the idea of participants submitting their own stories in an anonymous way.

ENGAGEMENT ZONE

SUPPLIERS:

Bang The Table, Civil Space
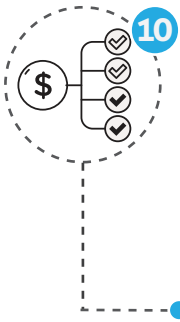
RESOURCE ALLOCATION

10

EARLY   MID   LATE

An online tool asking participants to prioritize between a set of options (facilities, services, designs, etc.), while working with finite resources (dollars, coins, tokens, etc.). This activity exposes and simulates key trade-offs decision-makers often have to make, and deepens particpant engagement with the issues and process.

ENGAGEMENT ZONE

SUPPLIERS:

Citizen Lab, *Civil Space,* MetroQuest

PARTICIPATORY BUDGETING

11

EARLY   MID   LATE
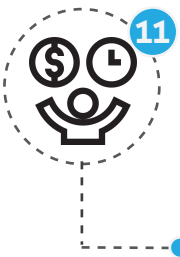
A more complex exercise focused on allocating limited resources across various priorities/needs. Participatory budgeting shows the financial impacts of participant choices in real time.

ENGAGEMENT ZONE

SUPPLIERS:

Balancing Act, Citizen Budget (Ethelo), CitizenLab, *Consul, Dicidim,* Participare, *Social PinPoint*

SCENARIO PLANNING & CALCULATORS

12

EARLY   MID   LATE

An online tool that helps people choose between alternative scenarios (future outcomes) and/or to see/explore the future effects of decisions made today.

ENGAGEMENT ZONE

SUPPLIERS:

CommunityViz, Ethelo, MetroQuest

DRAFT POLICY OR DESIGN COMMENTING

13

Allows participants to review and comment on draft or near final policy or design documents produced by the project team in later stages of a project.

EARLY   MID   LATE

ENGAGEMENT ZONE

SUPPLIERS:

Conceptboard, *Consul, Dicidim,* Ethelo, Konveio

VISUAL PREFERENCE

14

EARLY   MID   LATE

A highly visual technique where participants review images and then identify the physical design alternatives (urban design features, architectural styles, landscaping options, built environment options, etc.) they prefer. Can also gather short explanations for their choices.

ENGAGEMENT ZONE

SUPPLIERS:

Civil Space, CommunityViz, MetroQuest, MindMixer
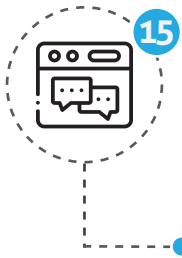
ASK ME ANYTHING (AMA)

15

A live Q&A session where attendees ask questions of a topic expert or person with a particular experience. Uses live webcast or a discussion forum like Reddit.
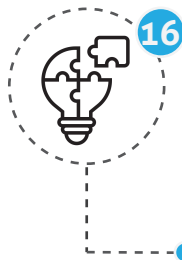
SUPPLIERS:

Facebook live, reddit

EARLY   MID   LATE

ENGAGEMENT ZONE

IDEATION

16

A focused brainstorming process where participants submit a proposal, idea, or question, suggest answers or modifications, and then rank and comment on the submissions. Some platforms focus more on live brainstorming.

SUPPLIERS:

Bang the Table, CitizenLab, *Consider.It*, Crowdicity, Forumbee, IdeaScale, Miro, OpenGov, Social PinPoint, Stormboard, ThoughtExchange, Wayblaze

EARLY   MID   LATE

ENGAGEMENT ZONE
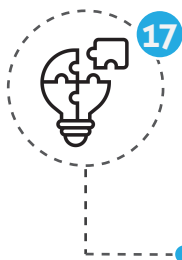
★ DIALOGUE & DELIBERATION

17

Through the use of "focus questions" under key theme areas, the project team can host a rich exchange of views leading to shared insight, new possible solutions, and even consensus on how to move forward. Dialogue activities are related to but very different from traditional discussion forums. The key fact is that "dialogue is a conversation with a centre, not sides" and that generating shared insight is the crucial aspect, rather than winning a debate. Deliberation is a form of thoughtful inquiry that moves a group toward a decision.

SUPPLIERS:

Common Ground For Action, DialogueApp, Loomio, Neighborland, Popdat, PublicInput, Synthetron, unhangout, Zilino

EARLY   MID   LATE

ENGAGEMENT ZONE

TELEPHONE TOWN HALLS

18

A cross between a large conference call and a private radio talk show, telephone town halls allow individuals to listen in to speaker presentations, respond to poll questions, and ask the speaker questions live; and ask the speaker questions live, all done over the phone.

SUPPLIERS:

Stratcom, Converso

EARLY   MID   LATE

ENGAGEMENT ZONE

**WHEN MIGHT YOU USE IT &
IN WHAT PARTICIPATION ZONE?**

WEBINAR / EXPERT PANELS

EARLY   MID   LATE

Curated presentations, allowing for moderated Q&A sessions, discussion, and additional feedback gathered through quick polls.

ENGAGEMENT ZONE

SUPPLIERS:

ClickMeeting, Demio, GoToWebinar, *LiveStorm,* Webex, *WebinarJam, WebinarNinja,* Zoom
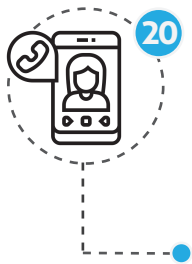
WEB / TELEPHONE CONFERENCING

EARLY   MID   LATE

Access a live web-based meeting or call in to a central number, to collaborate, hear from project staff, and ask questions. Platforms often allow screen sharing, quick polls, moderated Q&A, breakout rooms, and shared whiteboards.

ENGAGEMENT ZONE

SUPPLIERS:

Adobe Connect, Google Meet, GoTo Meeting, *Jitsi, Join.me, Meeting Owl, Microsoft Teams, Skype for Business, Uberconference, Webex,* Zoom

DIGITAL COLLABORATION SPACES

EARLY   MID   LATE

A digital canvas where presenters, team members, and/or participants collaborate in real-time, using a collection of tools to draw, collage, comment, and ideate.
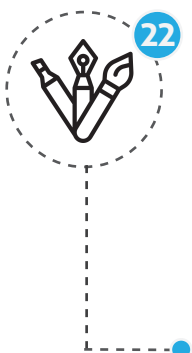
ENGAGEMENT ZONE

SUPPLIERS:

Awwapp, Google Jamboard, Microsoft Whiteboard, Milanote, Mural.co, *Sketchboard, Web whiteboard, Zoom*

GRAPHIC FACILITATION & RECORDING

EARLY   MID   LATE

One or more facilitators or recorders use drawing to capture key ideas and conversations from your event, representing discussion in a highly visual way. Livestream the graphic facilitation or recording, or present material at the culmination of event. Creates an artifact (integrative poster, several linked images, Prezi or detailed report) that can be shared to all participants and posted on project website.

ENGAGEMENT ZONE

SUPPLIERS:

Get the Picture, Ludic Creatives

★ ONLINE DESIGN CHARRETTES

An evolving practice from community planning, urban design and architecture, currently with no specialized suppliers. Designers use various visual tools to gather comments on an area, site or building to illustrate various options for the future. Participant comments, gathered from one to several days worth of dialogue, help the designers evolve plans and/or designs. We suggest using a combination of platforms to present background and issue papers, videos, and other display content; conduct community mapping or ideation exercises; and use web conferencing or graphic facilitation to replicate the rich dialogue necessary for successful charrettes.

EARLY   MID   LATE

ENGAGEMENT ZONE

SUPPLIERS:

If you are a supplier or know of a supplier focused on providing an all-in-one platform for charrettes, please reach out to us.

CROWDFUNDING

Individuals propose specific community-supportive initiatives or projects to fund, and then gather supporters to fund the project; an interactive online platform providing guidance for proponents and supporting outreach efforts.

EARLY   MID   LATE

ENGAGEMENT ZONE

SUPPLIERS:

Causes.com, *Citizinvestor, Kickstarter,* FrontFundr, *Neighborly*, Wayblaze

FULL ENGAGEMENT PLATFORMS

Licensed "one-stop" services providing a central location for project information, input activities, and meatier forms of engagement. These platforms offer a suite of tools and formats in one environment, often supported by moderation and reporting capabilities.

EARLY   MID   LATE

ENGAGEMENT ZONE

SUPPLIERS:

76Engage, Bang the Table, *CitizenLab, Civil Space, CrowdBite, Delib (Citizen Space),* Ethelo, Konveio, *MindMixer, Neighborland,* PlaceSpeak, *PubliVate, Social Pinpoint, The Hive*

EMERGING PRACTICES

As MODUS prepared and shared the first version of this document into the community planning, urban design and community engagement fields, we heard from colleagues doing interesting things in their own practices to shift to enhanced and expanded online practices.

In future versions of our "tools document" we will list and profile some of these innovations, so that we and others can learn from these new practices. We hope that you enjoy this example from our close colleague Derek Lee, Principal, PWL Partnership, and that you will send us similar stories when and if you can:

During the Cov-19 requirement for working remotely, we had to decide between postponing an important client-facing workshop or carrying it forward with them participating remotely. We decided to do the latter and fortunately have met with great success.

The project required us to engage with the client group with a visioning workshop for the project site. Using an online web conferencing platform, nine people participated in a visioning exercise that combined image selection, live sketching and a rich back-and-forth conversation by voice and text. We also were able to access our favourite digital sketching application on a tablet, and used that to capture the input of each of the participants through the online conversations, converting them rapidly into a series of graphic vignettes.

Normally we would approach this as a physical design charrette, where we would capture ideas, words, images, and blend them together as designers, and the good news is that we were still able to achieve this through a combination of good/simple technology, open discussion, and some advance 'homework' exercises by participants. The end result was a series of graphic vignettes that captured the words and images sent in advance, while allowing time during our online charrette for participants to engage and exchange ideas, through conversations and by working with the graphic sketch facilitator to realize their vision for the project.

www.pwlpartnership.com
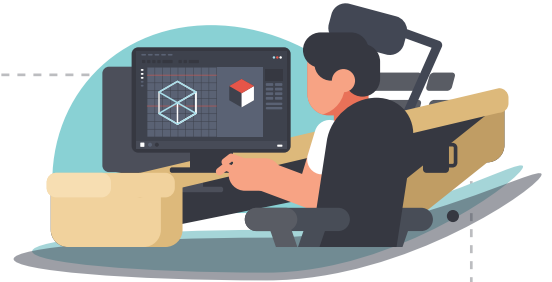
ADDITONAL RESOURCES

While researching specific engagement tools, we have come across several useful, recent and more general guides to working effectively online.

We are including a few here for your use, and will add more in version three of our "digital engagement tools document". We hope these resources are also useful to you, but take no credit or responsibility for their contents.

http://www.leadinggroupsonline.org/ebooks/Leading%20Groups%20Online.pdf

https://www.sessionlab.com/solutions/remote/

CLICK HERE
to receive future MODUS communications,
including quarterly e-newsletters
and updated versions of this document.