



# Palos Verdes Estates Public Engagement Toolkit November 2018

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# INTRODUCTION

Since its incorporation in 1939, Palos Verdes Estates has been known for its well planned residential neighborhoods, excellent schools, safety and quality of life, parklands and open space, fiscal management, community volunteers, urban forest, and breathtaking views of the Pacific. The roughly 13,500 residents value the 4.75 square mile City as a prime location to live and raise families and have high expectations of the City for the provision of services and preservation of the natural and built environment.

Palos Verdes Estates residents are busy with their multifaceted lives and expect the City to run smoothly and efficiently. Yet, when changes are planned, residents expect to be informed and in some cases involved. We aim to help guide the City's efforts to this end.

The City has been experimenting with various types of public outreach and engagement in recent years and now intends to adopt its policies and procedures for involving its residents in the public decision-making. This toolkit is that means.

This manual outlines simple steps to take for broadening public involvement. We outline a variety of programs that encourage active and diverse citizen participation. The goal is to equip the City with a set of tools they can draw on when seeking more robust, inclusive feedback from residents.

It is important to distinguish that this is NOT a marketing manual or a PR (public relations) guide. While there are elements of marketing in all outreach communications, we're talking about something different here: how does the City inform residents of opportunities to get involved in decisions that affect them where they live and work? This requires keeping residents informed about what is going on, involving them in the decision making process, and letting them know how their input has impacted City decisions and policy. Doing this well does not require re-inventing the wheel; this document draws on emerging practices and strategies to guide your thinking.<sup>1</sup>

## A TOOL TO MAKE YOUR JOB EASIER

It's not easy to determine the communication/outreach plan needed for individual projects, services and other items that make their way through the City decision-making process. Who needs to know? How do we tell them? That's where this toolkit comes in.

This guide will help you better understand when to engage, how to determine the target audience and the most appropriate process, and how to identify appropriate timing required for various types of engagement.

**IMPORTANT NOTE:** Ongoing innovation and evaluation are a necessary part of a culture of engagement, so this toolkit is intended to guide thinking, not define it. With a variety of city departments and hundreds of touch points every day, one size will definitely not fit all.

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<sup>1</sup> Much of the material in this toolkit is adapted from the City of San Luis Obispo's "Public Engagement and Noticing Manual" (November 2015), which is, in many ways, a gold standard for local government public engagement.

## BEFORE YOU BEGIN

City staff is stretched to meet the needs of the resident population and does not have excess capacity for outreach on every issue or decision. Nor is it expected. Still, certain public decisions require additional communication and engagement if they are to be effective and supported. It is important to think about whether and what type of outreach and engagement is needed *before* you begin any outreach process.

### Questions to determine whether (and at what level) to engage:

1. **What is the action/program/project you need to engage around?** Does everyone involved *internally* (elected, staff, commission, etc.) have a shared understanding of the scope and definition of the issue at hand?
2. **Who makes the final decision?**  
Is this a staff decision? Subject to advisory body review? Will City Council ultimately receive the item for action? It is important to make sure that decision-makers have agreed on the need for engagement, the appropriate level of engagement, and how feedback will be used. If the appropriate decision makers are not onboard, input may be overlooked or used in a different way than has been communicated to those involved. Because no one wants their time wasted, this can damage public trust more than failing to engage in the first place. For this reason it is essential that decision-makers are involved in answering the following question (#3 below).
3. **What type of community interaction is desired?**
  - You may need to **inform** residents about a decision that has already been made. Most informing can be done through traditional communication efforts, but occasionally an item may more deeply impact particular residents (i.e., traffic project on Palos Verdes Drive West) or may require some level of action on the part of residents (i.e., mandatory water restrictions during a drought). These may require greater outreach.
  - You may need to **consult** the community or stakeholder group members over proposed changes / new initiatives (i.e., median landscaping improvements; options for proposed ordinance regarding mandatory water conservation).
  - You may need to **collaborate** with the community to develop ideas /plans /programs on large scale future items (land use and circulation element, city budget).
4. **Who needs to/wants to be informed?**  
This question is critical and calls for some consideration. The focus of engagement is to involve the community. In PVE (Palos Verdes Estates), that community has many faces: residents at large (along with individual neighborhoods); interest groups ranging from senior citizens to business and arts to education; children and so on. Some issues may draw crowds from across the city and other communities, others may appeal to a limited number of residents. The point is that it is imperative to reach out to anyone who may want to be involved, especially if they are specifically affected by a decision (i.e. a road closure may not be a citywide issue, but it is of keen interest to those who frequent the road in question). Determining the outreach targets calls for thought, some digging, and your own good judgment (see “audience” on p 16for more help).
5. **When does the outreach need to happen?**  
The City’s review process can have many steps and take time to unfold. Some steps are defined by

municipal code; others call for personal discretion. Give citizens adequate time to be informed, educated and involved. No one likes to be caught unprepared on short notice. Start early and keep in touch. If there is a particular time-limit to implementation (i.e. a state mandate with a narrow adoption timeline, or a tax measure that runs close to a budget deadline) communicate this clearly to residents, and tailor the scope of engagement appropriately. Consider whether there may be future opportunities for deeper engagement and communicate those.

**6. What needs to be done?**

This guide outlines a series of recommended plans to use as reference for best practices on engaging your item.

**7. What does success look like?**

The purpose of each process will guide how you define success, whether that is more people attending your community outreach event, increasing diversity of feedback, introducing new ideas or keeping in touch with residents & stakeholders. Setting appropriate goals will provide a benchmark for future efforts. Note what worked, what didn't, and any valuable feedback from the public. Consider issuing a survey to assess public satisfaction with outreach efforts following engagement events.

# HOW TO USE THIS TOOLKIT

The toolkit is organized into three sections. Follow the three steps below to develop your engagement plan.

## **1. Matching Purpose to Process**

Use this section to help identify what level of engagement is best suited to the action/project/issue at hand and to get a sense of the roles, timeline, etc. Once you've identified your engagement objective, review the corresponding Engagement Tools.

## **2. Engagement Tools**

This section notes various elements that can be of use to you in engaging with the public (city website posting, Open Government Portal, community workshops, etc.) Each element is described in the glossary. In addition, think about what tools you will use to “close the loop.” It is important that the public know how their feedback has informed decision-making and what final decisions have been made.




## **3. Audience**

Move to page 16 to determine your target audience(s). How significantly will the issue on the table affect people, and with that in mind, who should be notified and possibly involved? Consider if your item affects the entire city, or use the lists provided to involve specific neighborhoods and/or certain special interest groups that may be affected. Determine whether media should be notified.

Remember: the toolkit only works when you add your judgment to the process. Nothing is simply black and white when it comes to outreach and engagement. It's all about communication. Communicate with your colleagues; communicate with already-organized stakeholders (they can often be your best allies) and work from a plan while recognizing it may need adjusting as time goes on.

# MATCHING PURPOSE TO PROCESS

Use the matrix below to help match your purpose to the appropriate process

			
<b>If Your Purpose is . . .</b>	To provide public with balanced and objective project/ issue information to increase awareness and/or understanding of problems, alternatives and solutions.	To take public feedback on project or other issue proposal and/or offer public opportunity to prioritize preference between viable options.	To partner with the public to develop alternatives and identify preferred solutions (may be open-ended).
<b>Then Your Goal is to . . .</b>	<b>INFORM</b> <b>Definition:</b> One-way communication/ outreach to citizens.	<b>CONSULT</b> <b>Definition:</b> Residents help prioritize on a finite number of options.	<b>COLLABORATE</b> <b>Definition:</b> Interactive process that incorporates recommendations as much as possible.
<b>Think about the roles that government and residents play</b>	Government as sole decision maker (whether staff, council, commission, etc.).	Government as final decision-maker but seeking to align with public preference on those options that are currently “on the table.”	Residents may share decision-making or even implementation responsibilities. Clearly define how feedback will be used, what is and is not on the table, and what else will be considered in making a final decision.
<b>Timeline</b>	Limited timeline – legal requirements for noticing, etc. usually sufficient.	Longer timeline - Ideally have options for events on different weeks to accommodate people being out of town. Outreach early and often.	Longest timeline -Depending on complexity of issue, anywhere from months to a year or more. Have sufficient time to <i>inform</i> separate from deliberation, provide multiple opportunities
<b>Appropriate Process</b>	Information session with opportunity for Q&A.	Discussion: Residents talking to residents with government listening and learning. For most issues an outside facilitator is not necessary. <sup>2</sup> May supplement with survey or prioritization exercise.	Face-to-face workshop: residents working together through creative processes to develop alternatives and priorities. Outside facilitation is probably necessary to ensure that government is involved on equal footing, not “leading” the conversation.
<b>Appropriate Venue</b>	Somewhere accessible and non-intimidating. Auditorium or classroom set up sufficient.	Comfortable room or outdoor space where people can meet preferably in small groups. Round-table set up or “conversation stations.”	Comfortable room or outdoor space where people can meet. Ability to work in small groups with report out to the larger group essential.
<b>Desired Conclusion</b>	Public is informed of what is happening.	The City has a solid understanding of public preferences.	Public establishes decision-making criteria, recommends solutions, or possibly makes the final decision.

<sup>2</sup> For issues where there has been a breakdown of trust in the past, you may want to consider an outside facilitator even for a consulting process.

# ENGAGEMENT TOOLS

On this chart, the left-hand column outlines the *minimum* requirements for an engagement process in each category (what residents *expect* and what will damage public trust and potentially leave the City vulnerable to legal action if not provided), while the right-hand column offers some suggestions for pro-actively improving your outreach and engagement in each category. All tools on this page are described in more detail in the glossary. Items in bold type are discussed in greater detail on pages 9-15.



## INFORM

### EXPECTATION

- ☐ Official Notice (if legally required)
- ☐ Website posting (Question & Answers page, FAQs or NEWs Item)
- ☐ Standard City marketing efforts:
  - Legal ad in newspaper
  - Postcards to neighboring owners/tenants
  - On-site signage
- ☐ Notifying or testifying to applicable advisory bodies
- ☐ Informing key stakeholder contacts, liaisons

### ADDITIONAL

- ☐ Social media (if applicable & available)
- ☐ Community Calendar
- ☐ Signage
- ☐ Paid media (newspaper, radio, TV, social media, digital, outdoor/transit)
- ☐ Informational materials (should also be available digitally on website, e.g. flyer, fact sheet, PowerPoint, postcard, door hanger, banner, poster)
- ☐ Press release/ media advisory
- ☐ Open Government portal
- ☐ **Neighborhood meetings**
- ☐ Information provided at stakeholder meetings when possible (Homes Associations, seniors associations, Chamber of Commerce, Land Conservancy, parents/school groups, etc)



## CONSULT

### EXPECTATION

- ☐ All of the "Inform" expectations listed above
- ☐ Hearing (if legally required)
- ☐ Notification through social media (if applicable and available)
- ☐ Meetings/ workshops held at convenient times

### ADDITIONAL

- ☐ **Neighborhood Workshops**
- ☐ **Open City Hall (web based, if available)**
- ☐ Open Government Portal
- ☐ Special events in the community with opportunities for interaction (park-based **pop ups**, block parties, etc.)
- ☐ Partnering workshops with civic and interest groups
- ☐ Surveys (mailed, telephone, online)
- ☐ Study session
- ☐ Focus group
- ☐ **Online prioritization platform**



## Collaborate

### EXPECTATION

- ☐ All of the "Inform" and "Consult" expectations listed above
- ☐ **Open City Hall (web based, if available)**
- ☐ **Community Outreach Event (workshop, open house, neighborhood meeting, etc.)**

### ADDITIONAL

- ☐ Facilitated workshops
- ☐ Surveys (mailed, telephone, online)
- ☐ Study session
- ☐ Focus group
- ☐ Special events with opportunities for interaction
- ☐ Open Government Portal
- ☐ Design charrettes, walking tours (keep mobility issues in mind), **budget games**, etc.
- ☐ **Online ideation platform**



# ENGAGEMENT BEST PRACTICES

Whenever you move beyond merely providing information to the public, some standard principles come into play. These apply whether you are seeking feedback, identifying priorities, or inviting creative input.

## **Things to consider when designing an engagement process:**

- All community events should be preceded by outreach noted in the “Inform” section of your matrix. A well-attended event is key.
- Incorporating outreach tools from the “Additional” column will attract a larger audience, resulting in more diverse feedback. Note that when introducing a new process, it may take a while for it to catch on. Even if your first attempts attract only the regular commentators, you are offering an opportunity for them to not have a regular experience. Ask participants who do come what they liked or did not like about the process, and if they have recommendations for how to increase audience. Engage them as ambassadors for future efforts if they are willing.
- Advertising these community events well ahead of their date with ongoing reminders is essential.
- Plan for enough space to accommodate the audience and provide some food or snacks.
- Choose an effective facilitator to lead the gathering. Facilitators are there to shepherd the conversation rather than provide input or influence opinion. He/she should be neutral in the discussion. This may be someone from city staff<sup>3</sup> or an outside facilitator.
- Mix people in small groups to break up cliques, get various perspectives and allow them to make new acquaintances.
- Allow for more informal dialogue; ensure that everyone gets heard, but don’t limit to the usual 3 minutes allotted during public hearings.
- If a resident wants to provide input or feedback outside of the particular outreach event, make key project contact information available and/or offer a meeting with staff.

## **Things to consider when designing and/or writing outreach materials:**

- Include all relevant contact information, including key contact names, phone numbers, email addresses and web addresses.
- If noticing a meeting or community event, be sure to include pertinent information such as date, place, time, topic, description of community event and format, alternate ways to participate (if applicable), and directions and/or a map if necessary.
- While unlikely, staff may experience language barriers when outreaching to specific groups. Be sure to include translation on all applicable materials.
- Consider using attention grabbing words and phrases that evoke emotion (e.g. you, free, sale, guaranteed, new, now, announcing, tell us, etc.) Also, a picture is worth a thousand words, so try to use imagery where appropriate. You may want to vet suggested titles and wordings with someone not directly involved in the project.

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<sup>3</sup>Facilitation trainings are available at many local government conferences, as well as through organizations like the Davenport Institute and IAP2.

# PROCESS OVERVIEW

The processes described in this section are by no means an exhaustive list of what is available to you. Public Engagement continues to be an emerging field and new and creative processes are developed all the time. This section surveys some of the “tried and true” processes that represent significant improvement over traditional town hall meetings. In this section you can find descriptions and suggestions for hosting:

- Workshops
- Neighborhood Meetings
- Open Houses
- Pop Ups

This section also offers some thoughts and resources for **online engagement** including

- Social Media
- Open City Hall
- Online surveys
- Online Ideation and Prioritization Platforms

## WORKSHOPS

**Workshops** allow the public to hear a concise presentation on a particular item from city staff and/or consultants, then work in smaller groups to develop ideas and alternatives that directly affect the planning process. Following small group discussion, the small groups reconvene to share their ideas with the larger group, and workshop outcomes are then passed on to decision-makers. Workshops should include a balance of staff presentation and group discussion that favors group interaction.

### **When do I have a workshop?**

Workshops are an effective tool for collaboration and should take place early in the planning process so feedback can be incorporated down the line. In order to keep group discussion focused, workshops should not take place until a project has a determined set of options and/or ideas to explore.

Workshops are most successful when the scope of discretionary decision making is clearly defined. If a particular direction or option is not on the table, be clear about that up front and ready to explain the reasons.

### **What should be included?**

Discussion groups should represent various parts of a plan where the public actually has an opportunity to weigh in on options and/or develop alternatives and solutions. Groups should be facilitated by city staff and/or consultants, and these facilitators should lead and promote public discussion. Always let the public know what happens next in the process, so that they understand what will happen with their feedback. Be sure to provide appropriate contact information so anyone who felt they were not heard has an opportunity to follow up.

### Essentials Checklist:

- ☐ Space large enough to comfortably accommodate the expected audience (consider seating capacity as well)
- ☐ Water. Other refreshments and snacks are desirable
- ☐ Sign-in sheets for names, email addresses, phone numbers and physical addresses (where applicable) so staff can follow up with attendees
- ☐ Visual or informational aid(s) of some sort to be included in the presentation and/ or stations (PowerPoint, video, photos, plans, maps, graphics, etc.)
- ☐ Large format paper and thick pens for notes that the public can see
- ☐ Facilitators for all small group discussions
- ☐ Comment cards
- ☐ Name tags for city staff Contact information
- ☐ “What’s Next?” explanation

## NEIGHBORHOOD MEETINGS

**Neighborhood meetings** are similar to workshops in that they involve short staff presentations and public discussion. Neighborhood meetings mean staff bring their presentations directly to their intended audience, which could include a special interest group or a specific neighborhood. These are place-based, and focused on issues that impact a particular part of the community more directly.

### When do I have a neighborhood meeting?

Neighborhood meetings should occur early in the planning process so feedback can be incorporated down the line. Staff should schedule neighborhood meetings during hours when most people in the affected group will be available, typically after-work hours. Including a weekend option may be helpful depending on the target group.

### What should be included?

Neighborhood meetings benefit from creativity and content/style directed at the audience. Neighborhood meetings should emphasize public discussion over staff presentation. Always let the public know what happens next in the process, so that they understand what will happen with their feedback. Comment cards should also be provided for people who do not feel comfortable speaking up.

### Essentials checklist:

- ☐ Space large enough to comfortably accommodate the expected audience (consider seating capacity as well)
- ☐ Water. Other refreshments and snacks are desirable
- ☐ Sign-in sheets for names, email address, phone numbers and physical addresses (where

applicable) so staff can follow up with attendees

- ☐ Visual or informational aid(s) of some sort to be included in the presentation (PowerPoint, video, photos, plans, maps, graphics, etc.)
- ☐ Large format paper and thick pens for notes that the public can see
- ☐ Facilitators for all small group discussions (see Best Practices page 8) Comment cards
- ☐ Name tags for city staff Contact information
- ☐ “What’s Next?” explanation

## OPEN HOUSES

While you may think of an **Open House** as an opportunity to familiarize the public with city governance or services, what we are talking about here is something more specific. An **Open House** typically features various informational stations rather than a formal presentation. The public is encouraged to engage in open dialogue with the facilitator at each station, including asking questions and providing feedback. Notes are taken on large format paper so people can see their comments have been noted. You may also want to think about creative ways to take comments, for example large sticky notes, or opportunities for creatively-inclined residents to sketch out ideas.

### When do I hold an Open House?

An Open House should be held in the middle of the planning process once drafts and conceptual plans are available. Open Houses should take place during hours where most of the public/affected audience will be able to participate, typically after-work hours or weekends.

### What should be included?

The public should have a clear understanding of the distinction between an open house and workshop ahead of the event. Stations should be clearly labeled, feature visual representations or aids, and should incorporate a place where comments can be written down and seen by everyone. Staff should also consider comment cards, as some people are more comfortable speaking up than others. Be sure to provide appropriate contact information so anyone who felt they were not heard has an opportunity to follow up.

### Essentials checklist:

- ☐ Space large enough to comfortably accommodate the expected audience and stations (consider seating options for people who can’t stand for extended periods of time)
- ☐ Water. Other refreshments and snacks are recommended
- ☐ Sign-in sheets for names, email address, phone numbers and physical addresses (where applicable) so staff can follow up with attendees
- ☐ Visual or informational aid(s) of some sort to be included at each stations (PowerPoint, video, photos, plans, maps, graphics, information boards, etc.)
- ☐ Large format paper and thick pens for notes that the public can see

- ☐ Facilitators for all stations
- ☐ Comment cards
- ☐ Name tags for city staff Contact information
- ☐ “What’s Next?” explanation

## POP UPS

**Pop Ups** can add an element of fun to public engagement and can take advantage of pre-existing opportunities to drive attendance. For example, if you are having a conversation around open space, you may consider a pop up at a popular trail or overhead. Perhaps you could have a pop-up near a soccer field if the issue on the table relates to youth services or other family-focused issues. You might consider partnering with concert nights, farmers markets, or other community events to see if you can hold a pop up booth.

### When do I hold a Pop Up?

Pop Ups can be valuable ways of soliciting informed feedback as well as providing opportunities for residents to identify priorities. They do not lend themselves as well to lengthy deliberation or to having residents engage with trade-offs. As such they should be held near the beginning of a process as plans are being developed. They should include information about further opportunities to engage as the process is developed, including community workshops, etc.

### What should be included?

Pop Ups should include some visual element that will attract people’s curiosity and encourage them to engage. Consider how you might incorporate large scale photographs or other visual graphics. Create an inviting space to sit or even to play. <sup>4</sup> Use infographics and practice simple, time-conscious explanations. Provide easy and quick opportunities for feedback (i.e. providing colored stickers to put on a poster to identify priorities, sorting marbles into bins to visualize limited resources around a budget discussion, etc.). Plan on being able to engage and receive some feedback in 8 minutes or less.

### Essentials checklist:

- ☐ Space (indoor or outdoor) adjacent to a popular event or activity
- ☐ Water. Other refreshments and snacks are recommended
- ☐ Contact sheets for names, email address, phone numbers and physical addresses (where applicable) so staff can follow up with attendees
- ☐ Visual or informational aid(s) on a static display that can be easily explained.
- ☐ Some mechanism for feedback - sticky notes, markers and poster board,

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<sup>4</sup> Tactical Urbanism advocates offer creative ideas that range from the simple (cafe tables in a park or a large poster that people can write on) to the very elaborate (turning a parking lot into a park for a day or creating a temporary garden). You can read about tactical urbanism here: <https://www.citylab.com/design/2012/03/guide-tactical-urbanism/1387/>

- ☐ Comment cards
- ☐ Name tags for city staff “What’s Next?” explanation

## BUDGET GAMES

**Budget Games** offer a fun, but low-stress opportunity for residents to engage in forced-choice decisions where resources are limited. They can be done online or in person, as part of a group discussion in a community meeting, or as an individual exercise at a pop up event. While the most obvious application of these is related to the city-wide budgeting process, they can also be helpful to create a realistic conversation around options where resources are limited (i.e. in considering priorities for a city-owned concession, a budget game might be used to demonstrate the trade-offs between services and fees).

### When do I conduct a budget game?

Budget games should be held at the point in a process where draft and conceptual plans are available and where good estimates of costs and tradeoffs have been developed. They should take place during hours where most of the public will be able to participate. They may be included as part of a community workshop or a pop up event. There are also online budget game tools that residents can participate in at home or as part of a community event.

### What should be included?

Budget games should include clear instructions and a clear explanation of the project or decision that is being considered. They should have a visible and preferably tangible element. For example, you may want to allocate a certain number of legos, marbles, pennies, etc. to each resident or team and have them allocate their “funds” among the various priorities. Think of how to include an element of fun.




### Essentials checklist:

- ☐ Space large enough to accommodate the expected audience
- ☐ Simple instruction sheets
- ☐ Visual, intuitive explanations of the issue on the table
- ☐ Small items (coins, marbles, stickers, etc.) that can be allocated among projects, programs or other priorities.
- ☐ Sign-in sheets for names, email address, phone numbers and physical addresses (where applicable) so staff can follow up with attendees
- ☐ Information on how feedback will be used and what next steps will be taken.

## ONLINE ENGAGEMENT

Engaging with residents in the 21st century can be both facilitated and complicated by ever advancing communications technology and web and mobile based platforms and applications. It is beyond the scope of this strategy to provide policy recommendations regarding the city's online or social media presence. However, it is worth pointing out that when informing or engaging with residents online, many of the same principles apply.

1. When considering engaging with residents online start by asking the same questions you would ask before beginning any other engagement (see page 2-3 of this guide)
2. Use the matrix below (corresponding with the matrix on p 4) to think about the appropriate tool for engaging online.

			
Purpose	INFORM	CONSULT	COLLABORATE
Goal of Platform	Provide clear, usable information to the public.	Elicit <i>informed</i> resident opinion.	Create online space for deliberation (mimicking in-person workshops).
What to look for	easy navigation; attractive graphics, downloadable information, existing audience	easy navigation, transparency, element of fun, availability for participants to see other responses	clearly presented information; users compelled to interact with other users' ideas; clear guidelines users accept; ability to moderate forum
Appropriate Platform <sup>5</sup>	Transparency Platforms (e.g., OpenGov); Social Media platforms (ie Facebook, Nextdoor, Twitter)	Survey/ Voting Platforms (i.e. FlashVote, Balancing Act, Bang the Table); GPS/ Map-Based Platforms (i.e. Social Pinpoint Crowdbrite)	Ideation Platforms (i.e. UserVoice, MixedInk, Conteneo, ProCon, Synaccord, etc.)
Desired Conclusion	Government transparency - public is informed of what is happening, how resources are being used, etc.	The City has a sense of resident priorities.	Public establishes decision-making criteria, recommends solutions, or possibly makes final decision.

**A Note on Social Media:** Social Media can be a valuable tool for providing information to residents and for driving resident traffic to both in-person events and more deliberative online platforms. Unfortunately, social media can face many of the same obstacles as traditional public processes, including over-representation of a few active voices. Comments posted on social media should be placed into context of broader, more deliberate public engagement processes online and offline. Don't assume social media tells the whole story. It is most properly understood as a tool for informing and promoting other opportunities.

<sup>5</sup> Many of the platforms listed here are subscription based but many can be project-based as well.

# AUDIENCE

One of the most important aspects of community engagement is thinking through the “who.” Who will be interested in/affected by the topic under consideration? Who are the stakeholders? Begin by understanding the range of interest groups and organizations that care about Palos Verdes Estates. There are literally dozens in the city alone. And remember: the contacts themselves can be a great resource for determining who else should be asked.

## ORGANIZATIONS/ INTEREST GROUPS TO CONSIDER

Peninsula Seniors  
Palos Verdes Peninsula Chamber of Commerce  
Palos Verdes Peninsula Land Conservancy  
South Bay Economic Development Partnership  
Neighborhood Watch  
Palos Verdes Homes Association  
Malaga Cove Homeowners Association  
Lunada Bay Homeowners Association  
PVE CARES  
Disaster District Preparedness (DDP)  
Faith-based groups  
Palos Verdes Unified School District  
PTA  
Malaga Cove Business and Professional Organization  
Concessions members/users  
Palos Verdes residents for responsible government (PVrrg)  
Recreational organizations (cyclist clubs, hiking groups etc.)

## MEDIA KEY CONTACTS LIST

The following contacts list is general and may change over time, so be sure to keep your own records up to date.

### Print/Online

Peninsula News  
The Daily Breeze  
The Los Angeles Times  
The Beach Reporter  
Easy Reader  
Peninsula People  
PVP Watch  
Patch

### Television/ Radio

RPV Cable channel 33  
NBC, KTLA, ABC, CBS, FOX – Los Angeles  
KNX 1070



# VENUES



Meetings should be held in an easily accessible location with available parking. Some possible meeting venues in Palos Verdes Estates include, but are not limited to:

Montemalaga Elementary School  
1121 Via Nogales

Lunada Bay Elementary School  
520 Pase Lunado

Valmonte Early Learning Academy  
3801 Via La Selva

PVUPSD at Malaga Cove School  
375 Via Almar

Palos Verdes High School  
600 Cloyden Road

Palos Verdes Intermediate School  
2161 Via Olivera

Malaga Cove Library  
2400 Via Campesina

Palos Verdes Golf Club  
3301 Via Campesina

Parks

# CREATING A CULTURE OF ENGAGEMENT

Applying proper judgment and creativity to engagement processes is best done in communities where there is a robust culture of engagement. As resources and opportunities allow, City leaders and staff at all levels are encouraged to think of ways to instill a culture of public engagement in Palos Verdes Estates.

This may include (but certainly is not limited to):

- 1. Fostering public engagement as part of professional development amongst current employees.** Public engagement is a vital leadership skill for local government leaders. Employees should be encouraged to pursue learning opportunities in public engagement as opportunities arise. Local government conferences often have sessions dedicated to public engagement. Organizations such as the Davenport Institute and the Institute for Local government offer training. Perhaps public engagement can be made a centerpiece of staff workshops or brainstorming sessions.
- 2. Considering public engagement when making new hires.** While it may not be possible for every city to create a position for a “chief engagement officer,” think about how you might incorporate public engagement into job descriptions when hiring for open positions or for new positions.
- 3. Promoting Public Engagement as a key element of good governance.** How does public engagement make government better? Effective, inclusive engagement ties closely to good governance principles of ethics, transparency, accountability, equity and sustainability. Consider including engagement, where appropriate, as a metric when evaluating key elements of City functions.

# PITFALLS TO AVOID

Despite the best public engagement intentions, it can be easy to get off track. Identifying common pitfalls upfront can help you avoid getting caught off-guard as your engagement efforts get underway. Here are a few common public engagement errors that are easy to make:

- **Assuming that because you are not part of the conversation, the conversation is not happening:** As noted earlier, residents are busy, with full lives and competing priorities. While it is a mistake to confuse contentment with apathy, it is also a mistake to assume that not hearing from people means nothing is wrong. People may not know the right channels to communicate with the city; they may be talking to each other, or online. Honestly evaluate your outreach efforts, think creatively about how to keep a pulse on resident satisfaction.
- **Failing to communicate goals either internally (to staff) or externally (to the public):** Does everyone inside and outside city hall have a clear and shared understanding of what is and is not on the table. Are frontline staff able to accurately communicate information and answer questions?
- **Not having buy in from the proper decision makers:** Nothing erodes public trust like a well-run public engagement effort that is dismissed by decision makers. Who will be making the final policy decision? Staff, Council, a Citizen Commission? Make sure decision makers are on board *before* going to the public. This particular pitfall has several corollaries:
  - a. **Deciding on the answer before you ask the question:** Public engagement is not selling the public on a decision previously made. It's also important not to assume that you know what residents will say. Make sure to listen authentically.
  - b. **A few loud voices are given priority:** A well-designed process is harder for any one voice to "take over." But even when engagement processes have been well designed and diverse resident input has been heard, a few loud voices at a council meeting can overwhelm the written report and testimony of the larger engagement efforts. Make sure decision-makers are kept informed as the engagement process proceeds, and aware of turnout, diversity, etc. at engagement processes. This will make it easier to identify whether voices in traditional processes reflect the broader community, or whether they constitute a few "squeaky wheels."
  - c. **Engaging on periphery or "fluff" questions rather than substantive issues:** Residents know when public engagement is a political maneuver. If the question is tangential to the *real* issue residents are concerned about, engagement will erode trust rather than build it.
- **Number of voices is mistaken for diversity of voice:** It is important to pay attention not only to *how many* people show up for any engagement process, but also to *which* people. This can be a particular problem with social media engagement, because particular platforms draw a vocal, but limited audience. Who are you hearing from? Are some people coming to multiple events? Are there groups you aren't hearing from? Is it the same or different people and groups represented in the conversation? If after a first or second event, there are obvious gaps in representation, take time to strategize how to reach out specifically to underrepresented

groups. Consider the target audience. What obstacles may they be facing? Can you draw on a strategic partnership or other relationship to help ensure they get heard?

- **Rushing the engagement process:** As mentioned earlier, it is vital to allow sufficient time for planning, design, outreach and implementation.
- **Assuming social media engagement equals public engagement:** Good engagement cannot happen primarily on social media platforms. While social media can help identify issues that may be ripe for more deliberate engagement, engaging through comment threads, etc. cannot constitute real, in-depth deliberation. Social media voices, which are often more reactive, should not drown out more deliberative engagement with citizens face-to-face. At the same time, the City should be responsive to social media: timely in answering questions, and providing information about further opportunities to engage off-line. It requires discernment and leadership to know when and how to respond on social media, and when to simply let the conversation play out.
- **Failing to allow for appropriate expression of anger:** on some issues, especially on issues that are sensitive, in response to traumatic situations, or when the issue connects to historical lack of trust, the public may need to express legitimate anger or frustration. Think about whether time needs to be set aside to express anger. Consider how you might incorporate bridge building exercises and whether a neutral outside facilitator might help.
- **Public becoming burned out:** Residents may grow discouraged if the government fails to “close the loop” and they do not see how input has been considered or incorporated. They may also burn out when they are consulted too frequently or too many events are scheduled at the same time. Use discretion in planning manageable engagement, and always evaluate participant satisfaction.

# GLOSSARY

**ADVISORY BODIES.** Voluntary citizen groups appointed by the PVE City Council to provide input on key city issues and activities. (See list on Audience page).

**CHARRETTE.** An intensive planning session where citizens, designers and others collaborate on a vision for development. It provides a forum for ideas and offers the advantage of providing immediate feedback to the designers.

**CITY WEBSITE POSTING.** Share project news, meeting announcements, calendar items, progress reports, agenda packets and more. Possibly use News section, FAQs or Questions & Answers page.

**COMMITTEE FORMATION.** For purposes of collaboration, consider forming a committee or subcommittee for regular contact/check-ins regarding a certain topic/project. This committee should be made up of a representative group of stakeholders or advisory body members, with the understanding that they will be called upon often over the course of the project/issue for their input and expertise.

**COMMUNITY CALENDAR.** No-cost method of announcing event details through online, print, television and radio calendar postings. Most community calendar notices can be easily posted by the interested party using online resources.

**DIRECT MAIL.** Postcard, letter, flyer, fact sheet and other items sent using U.S. Mail. Larger mailings can qualify for reduced postage costs by using bulk mail rates (bulk mail permit required). Bulk mail requires zip code sorting and other special handling and permits. Note: Only items handled by the U.S. Postal Service can be placed in residential or commercial mail boxes. It is illegal to use mailboxes for door to door flyers, notices, etc. that have not been mailed. Flyers under doormats and door hangers are often used to share neighborhood information without violating postal regulations.

**FACT SHEET.** Brief one-page description of a proposed project or activity. Fact sheets typically utilize bulleted format, to convey information succinctly. Fact sheet should always include contacts for further information (i.e., phone number, web address, email).

**FLYER.** Graphically compelling print pieces circulated in specific areas to generate attendance at public meetings and activities. Typically 8.5 x 11" in size, but can use irregular sizes for cost efficiency and/or to gain additional attention. Can be used as billing inserts, or posted in willing businesses and other commercial locations.

**INTEREST GROUP.** Citizens with shared interests who are often united in expressing their concerns and opinions about various project proposals; also called special interest group, i.e., seniors, cycling enthusiasts, youth services advocates, etc.

**KEY CONTACTS/LIAISONS/NEIGHBORHOOD CHAMPIONS.** Some neighborhoods/special interest groups have key contacts or liaisons who will be essential in disseminating information to the larger group. See Audience section for details.

**NEIGHBORHOOD/ESTABLISHED NETWORK EMAIL TREE.** Organized communication tool used by residents to communicate with each other about issues and activities of shared interest; typically applies to specific geographic areas. May be created using database management products like My Neighbors, in which

specialized outreach groups are created by neighborhoods. The NextDoor app is a popular version of this community tool.

**NEIGHBORHOOD MEETINGS.** Staff takes information “on the road” for face-to-face communication with residents, interest groups and others. Neighborhood meetings can range from special interest group presentations (chamber of commerce committee meeting) and speeches to large bodies; to targeted outreach (playground equipment preferences asked of park users), to ice cream truck neighborhood events. Neighborhood meetings mean staff “goes to them,” rather than citizens coming to City Hall and other venues.

**NEIGHBORHOOD SURVEY.** Surveys can be conducted online via the city website, or conducted by hand via door-to-door contact. Surveys can also be mailed and emailed. See Best Practices section for more details.

**NOTIFY MEDIA.** Can include but does not require a formal news release. A formal release offers the “who, what, where, why, and how” of a particular issue or activity and is circulated via email by staff to local media for publication. See Audience section for a list of key local contacts.

**OPEN CITY HALL.** Effective online program for generating citizen interest, knowledge and participation in city decisions.

**OPEN HOUSE.** Informal public gathering to introduce a project, service proposal or other idea using information centers and materials; on site staff to answer questions, hear comments, etc. No formal staff presentation.

**PAID ADVERTISING.** Print ads, television and radio commercials, online advertising, bus and bench advertising, billboards and other paid media that have associated costs for design, copywriting, media placement. Media outlets are contacted for information on costs, deadlines, production needs. Typical print ads include:

- Legal ad. Appears in a specific section of the newspaper. Typically contains text only.
- Display ad. Advertisement appears alongside regular editorial content. Can contain text, photos, logos, maps, graphics.
- **POSTCARD.** Printed piece used to provide brief, to-the-point information for citizens and sent via U.S. Mail. Postcards can range from traditional travel postcard size to “sumo” oversized postcards, with all requiring the same per piece postage. Lack of envelope may help assure the piece is viewed by recipient.
- **POSTER.** Graphic print communication promoting meetings, open houses, workshops and special events or services; generally 11x17” in size or larger. Post in willing local businesses and other commercial locations.
- **PRINTED MATERIAL.** Print announcements ([flyer](#), [postcard](#), door hanger, banner, [poster](#)) creatively designed to generate attention about issues and activities in specific neighborhoods. Printed materials should highlight pertinent information and/or direct people to additional information about a particular topic.
- **PUBLIC ACCESS CHANNEL.** Gavel-to-gavel webcast and televised public access to government meetings.

- **REQUIRED LEGAL NOTICE** Required by municipal code for most development projects. Timely posting in a newspaper of record about a project, rate increase, ordinance or other activity. These notices are required by law and are typically made through the City Clerk. Legal notices may also be physically posted on project sites, residential properties, etc. to alert neighbors and others of pending action, proposed changes, etc. on land use matters and to notice hearing dates for comment can be received.
- **SIGNAGE.** Consider temporary signage (banner, stake sign, etc.) at the site of a project to keep neighbors and passersby apprised of project status and key contacts/websites for additional information.
- **SOCIAL MEDIA.** Apps, websites and other platforms that enable users to outreach to broad audiences and engage with those audiences in discussion on a daily basis. Users of social media have an expectation that communication is two-way and if your department chooses to engage in social media, you should expect and respond to discussion. Examples of platforms currently being used by city departments include Facebook, Instagram and Twitter. Paid promotion of your department's Facebook page or important posts should be considered in order to reach the appropriate audience type and size. A sponsored Facebook post, as it's called, is a relatively inexpensive advertising method to utilize in order to expand viewer reach.
- **SPECIAL EVENTS.** Certain events should be leveraged as outreach opportunities when the demographic is appropriate. i.e., local sporting events such as soccer games to inform/consult local residents regarding parks and recreation project/issues; etc.
- **STAKEHOLDER MEETING.** Should be considered during the consult phase as a group meeting comprised of issue/project stakeholders.
- **SURVEY.** Early outreach opportunity to collect opinions at the start of a project. Multiple- choice questions generate better response than open-ended questions.
- **WORKSHOP.** Community gathering, generally on a citywide matter, used for presenting information, and then facilitating public engagement using small group exercises and discussion questions.

# CONCLUSION

Using the techniques and tools listed in this guide will allow the City of Palos Verdes Estates to get beyond communicating with the usual one hundred residents and involve a wider cross section of the public. This should improve satisfaction with the decision-making and motivate more people to engage with the City for the benefit of the whole community.

End