



# The art and science of designing online engagement

---

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

# Overview

1. **Introduction:** who we are
2. **Lay of the land:** how engagement is changing
3. **Building blocks:** steps for designing online engagement
4. **Case study:** how it can look in practice
5. **Questions:** let's discuss





# Who we are.

---

**Context: An Argyle Company (Context) is a full-service and award-winning public engagement and communications agency.**

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



## Who I am.

---

Hi, I'm Miranda.

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


**I am a Co-chair and board member of the hua foundation,** a non-profit organization in Vancouver's Chinatown working to advance civic decision-making, engagement and representation through an inclusive, anti-racism lens.





Engagement is  
changing.





**What are your challenges  
with online engagement?**





# Online engagement *is hard.*

How do you choose the right online platform and tools to use to creatively inform (and not bore) people, to gather the input you need, while reaching those underrepresented populations you want to hear from?



# Today's topics

Building blocks for designing online engagement



## PLAN

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



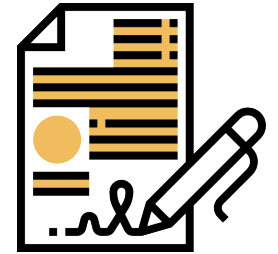
## BUILD

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



## REACH

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

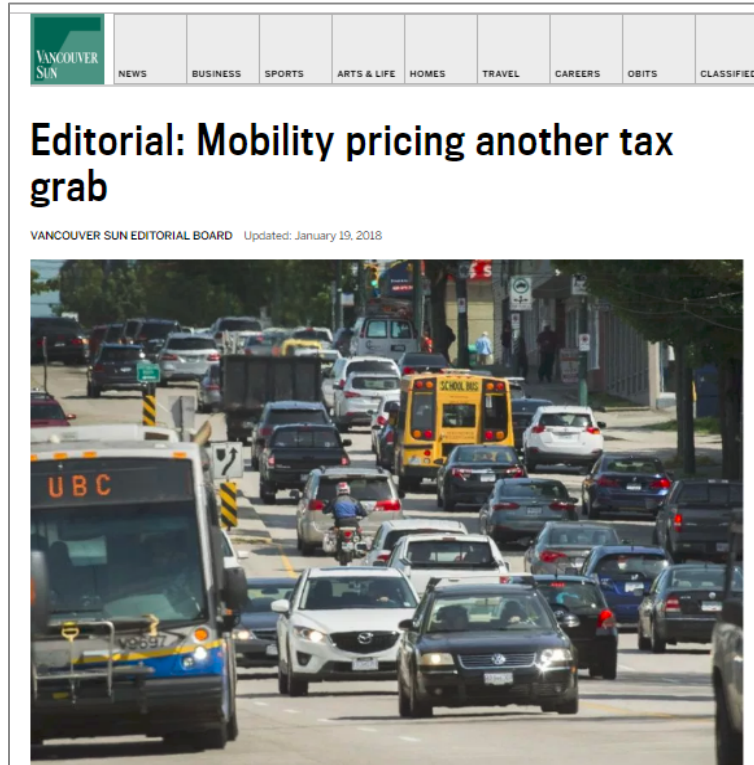


## REPORT

How to analyze and integrate the data to tell decision-makers and the public the story of what you heard

# Today's case study

Engaging Metro Vancouverites online about mobility pricing



## Situation:

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

## Objectives:

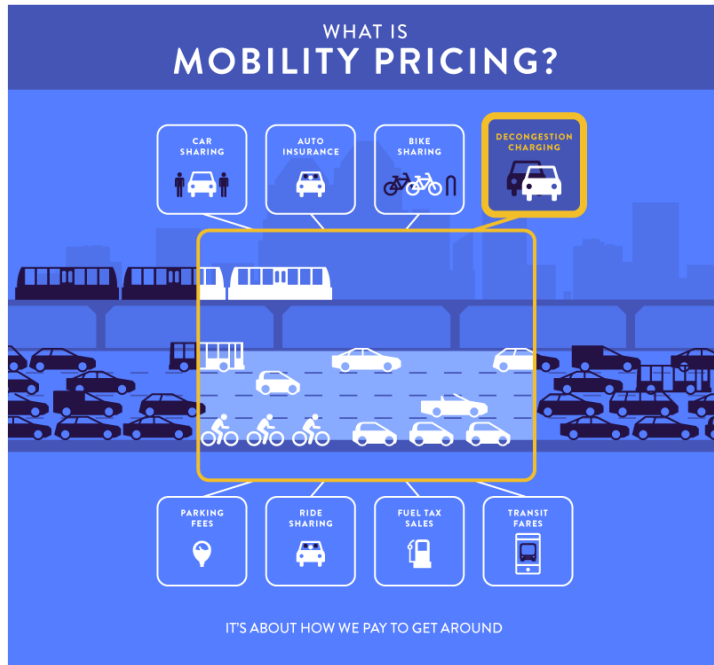
Inform and gather input from Metro Vancouver's diverse population on potential mobility pricing options and key considerations

## Key challenges:

- Lack of public awareness on mobility pricing
- Lack of understanding on impacts and benefits
- Meaningful conversation amidst affordability crisis
- High levels of frustration and controversy

# Today's case study

## Engaging Metro Vancouverites on mobility pricing



### What we did:

We developed and implemented *It's Time*, an integrated communication & engagement program which included:

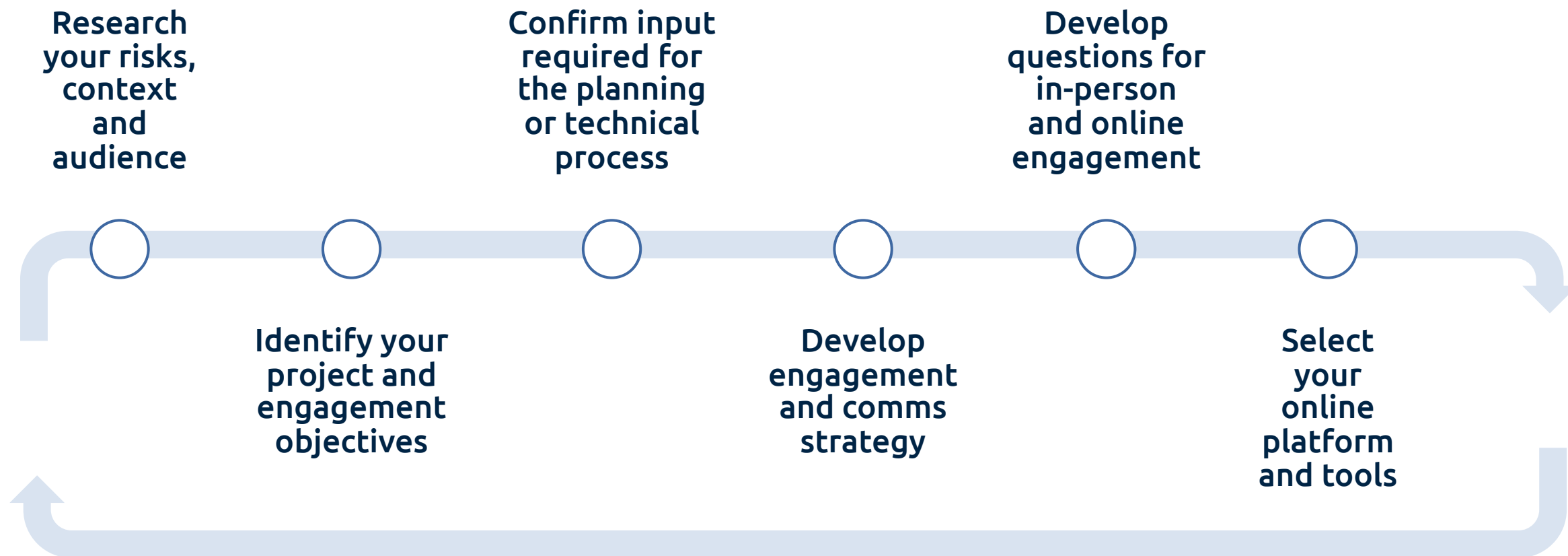
- Public online engagement
- Robust stakeholder and elected official engagement
- Multilingual communications campaign
- Targeted group and multicultural outreach
- Extensive analysis and reporting



# PLAN

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

# Step 1: Design a research-based strategy





# Step 2: Confirm your project objectives

## How will you use public input in your project?

Such as:

- Feeding into structured decision-making process
- Creating a vision
- Submitting feedback
- Assessing consensus and support

## What kind of public input do you need?

Such as:

- Input into values, principles or criteria
- Ideas or suggestions
- Feedback or evaluation
- Impacts or consequences
- Voting

## What reporting output(s) would be most useful?

Such as:

- Public input data (qualitative, quantitative, and/or geo-based)
- Participation data
- Segmented data based on demographics

# Step 2: Confirm your project objectives (cont'd)

## How will you use public input in your project?

Consider a platform that:

- Can be used for multiple phases for a consistent user experience

## What kind of public input do you need?

Consider a platform that:

- Has the tools or features you need to facilitate your data gathering (map-based, vision wall, tradeoff analysis, consensus analysis)

## What reporting output(s) would be most useful?

Consider a platform that:

- Allows you to tag or theme comments in real-time
- Provides detailed participation data
- Allows you to cross-analyze data based on demographics

# Step 3. Understand your engagement objectives

## How complex is the information?

Consider a platform that:

- Offers formatting to lay out info in digestible ways (drop-downs, headers)
- Displays videos, gifs, images to help educate in a visual way
- Offers real-time interactive tools that show constraints and tradeoffs

## How contentious is this project?

Consider a platform that:

- Has tools that demonstrate transparency
- Displays real-time polling or voting results
- Allows participants to see what each other are saying

## How can you make your platform more inclusive?

Consider a platform that:

- Can be translated (the platform and comment features)
- Has simple navigability, is user-friendly and has a visual layout
- Is WCAG 2.0 accredited

# Step 4. Select your online platform and tools

1

## **Front-end engagement tools**

How participants provide their input.

2

## **Layout and formatting features**

How the content and engagement tools are laid out for participants.

3

## **Back-end tools and features**

How the project team can gather, monitor and export the data.

Back-end features can also include moderating participant comments for profanity and detailed participation analysis based on demographic questions.

# Step 4. Select your online platform and tools



GUEST

This is totally unfair for those who live where no other travel options are available, therefore must drive and also for those who must drive to, during and after work days

March 14 at 4:09pm ♥ 1 Like Reply



GUEST

If you're going to implement distance based charging, then you should have the adequate infrastructure already set in place. This will also disproportionately affect those who live GVRD and work in the downtown core. If you're looking for a fair solution... this isn't it.

March 14 at 4:07pm ♥ 3 Like Reply



GUEST

Totally agree. In the past money that was supposed to be used to improve transit has not been allocated for that so I don't trust the pay now get service later approach. Give us the options of decent transit and river crossings then let's talk about distance pricing and or tolls etc. But not before

March 14 at 4:49pm ♥ 1 Like



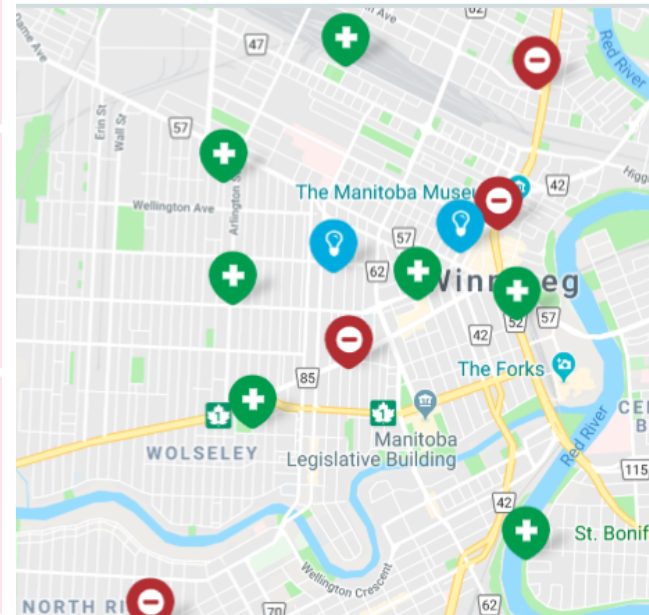
GUEST

Road infrastructure and Translink services need to be vastly improved before implementing an additional charge. I don't

<p>29 October, 2018 Anonymous says:</p> <p>The larger share of the money is spent persistent buildings and infrastructure at are needed and will be well used by Calgarions."</p> <p>1 29</p>	<p>28 October, 2018 Anonymous says:</p> <p>"Calgary doesn't have enough infrastructure to handle current population let alone increase during olympics (transit, roads, police, medical)"</p> <p>38 2</p>
<p>28 October, 2018 Anonymous says:</p> <p>quantifiable adjectives like "vibrant" &amp; "world class" are used to describe tcomes that some want to see but not pay for.HYPE "</p> <p>34 1</p>	<p>28 October, 2018 Anonymous says:</p> <p>"Olympics are a business.Let business people finance and operate sports &amp; entertainment ventures.Let the tax mules rest!"</p> <p>32 0</p>
<p>28 October, 2018 Anonymous says:</p> <p>"Advantages accrue to select and olitically well connected groups while everyone bears the expense. ncentrated benefits and diffused costs"</p> <p>36 1</p>	<p>28 October, 2018 Anonymous says:</p> <p>"Olympics create no new economic benefit.Redistributes existing resources unfairly and inefficiently.Taxpayers should get to vote twice!"</p> <p>32 0</p>

Drag to comment

> This Works This Doesn't Work Idea



1. I could support distance-based charging if it made my travel times shorter and more predictable.

TOTALLY DISAGREE DISAGREE DON'T KNOW AGREE TOTALLY AGREE

Select a Button to vote

2. I could support distance-based charging if the fee was affordable and I had alternative options to get around.

TOTALLY DISAGREE DISAGREE DON'T KNOW AGREE TOTALLY AGREE

Select a Button to vote

3. I could support distance-based charging if funds were used transparently to improve our regional transit and transportation system





## Case study: *It's Time* engagement program

## Selecting our online platform for a contentious engagement

### How we started

Audience  
research

Issues analysis

Engagement  
objectives

Project  
objectives

Integrated  
technical and  
engagement  
process

### What we needed in our online platform and tools

#### Layout features:

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

#### Front-end engagement tools:

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

#### Back-end features:

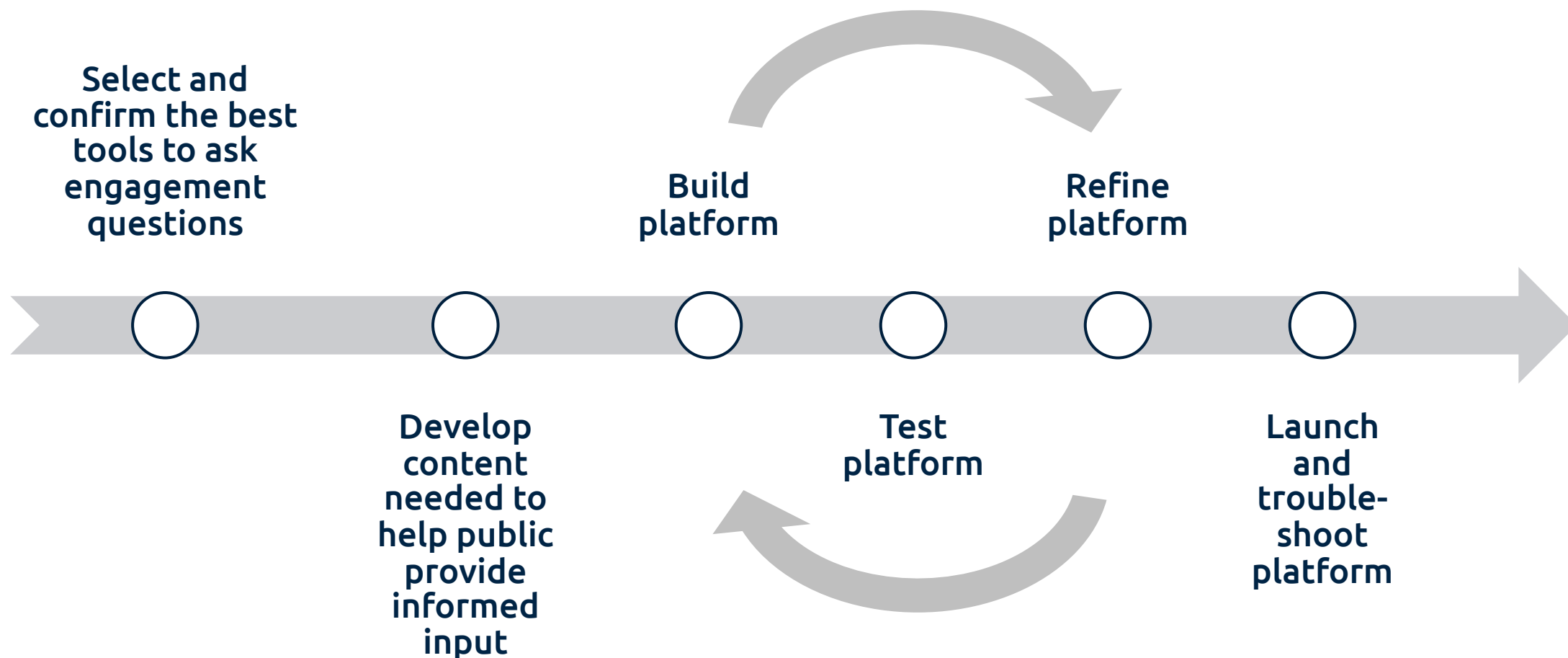
- Participation analytics: Review participation trends, underrepresented groups, and traffic channels
- Data is securely hosted in Canada with data integrity measures to monitor suspicious activity
- Moderation pane: Review and delete inappropriate comments



# BUILD

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

# Step 1: Develop a budget and workback



# Step 2. Design your platform for your user

## Navigation process

Hold your user's hand

Give your user breaks

## Communications content

Use simple, inclusive language and visuals

Balance informing with overloading

## Engagement tools

Put your priority questions first

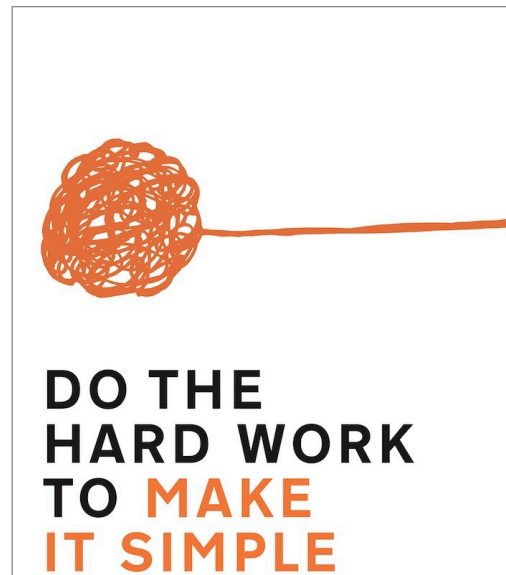
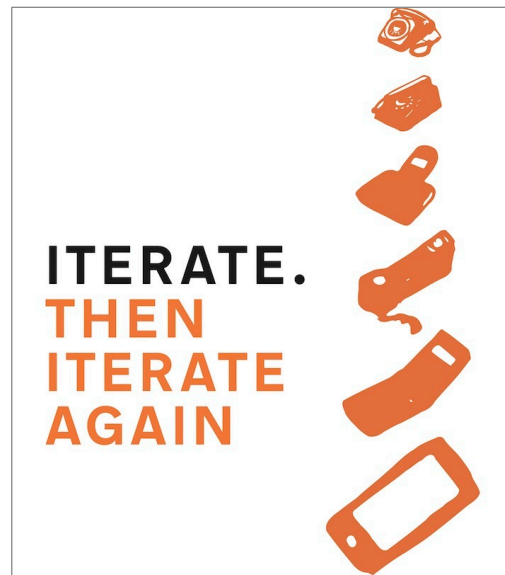
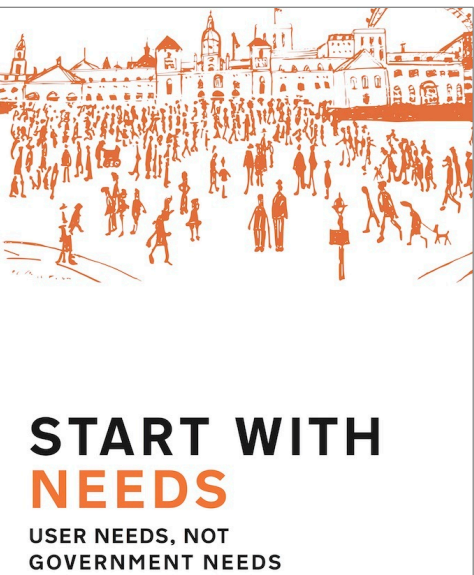
Ask clear and short questions

## User experience

Don't ask for too much time

Give people space to be heard

# Step 3. Refine platform design to be user-centered



*Part of Gov.UK 10 design principles*



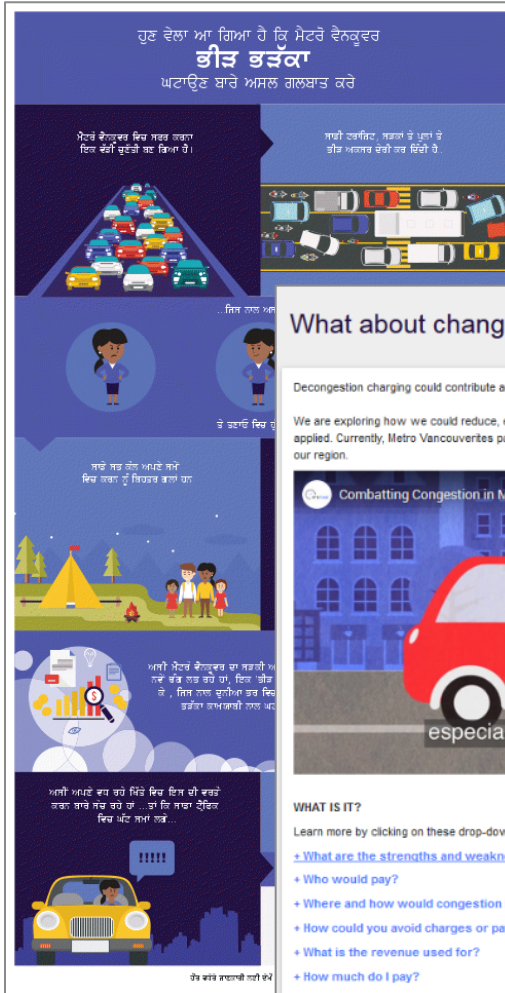


## Case study: *It's Time* engagement program

## Informing and engaging Metro Vancouverites on mobility pricing

### Educated

Used multilingual infographics, videos and drop-downs to share complex information



#### What about changing the fuel tax?

Decongestion charging could contribute additional funds to our regional transportation system.

We are exploring how we could reduce, eliminate, or maintain the fuel tax if a decongestion charge was applied. Currently, Metro Vancouverites pay \$0.17 per litre of motor vehicle fuel they buy at the pump in our region.



#### WHAT IS IT?

Learn more by clicking on these drop-down questions:

- What are the strengths and weaknesses?
- Who would pay?
- Where and how would congestion improve?
- How could you avoid charges or pay less?
- What is the revenue used for?
- How much do I pay?
- What are considerations we heard in Phase 1?

### Engaged

Used radio buttons and interactive public commenting to gather input

I think congestion is bad on and around bridges crossing the Fraser River.

#### BRIDGES CROSSING THE FRASER RIVER

This includes the Golden Ears Bridge, the Port Mann Bridge, the Pattullo Bridge, the Alex Fraser-Queensborough bridge corridor and Massey Tunnel.

TOTALLY DISAGREE DISAGREE DON'T KNOW AGREE TOTALLY AGREE

Select a Button to vote

2. I could support distance-based charging if the fee was affordable and I had alternative options to get around.

TOTALLY DISAGREE DISAGREE DON'T KNOW AGREE TOTALLY AGREE

Select a Button to vote

3. I could support distance-based charging if funds were used transparently to improve our regional transit and transportation system.

TOTALLY DISAGREE DISAGREE DON'T KNOW AGREE TOTALLY AGREE

Select a Button to vote

#### COMMENTS

In addition to key considerations like affordability and transportation options, what else might make Distance-Based Charging work for you?

**HIDE COMMENTS**

**GUEST**  
trying to implement distance based charges would be a nightmare and probably not cost effective. You would be better off going back to bridge tolling or call it what it is. Add more tax to gas and be transparent about what the charges are for. People do not commute great distances every day because they like to, they just can't afford to live downtown. Spending hours a day in their vehicle is already a penalty as time is valuable and adding an additional tax would just be inflicting further pain.  
March 19 at 10:12pm Like Reply

**GUEST**  
Several of these options would penalize me and my neighbours simply based on the fact that we already live in a congested area. So to simply get groceries or take kids to extracurricular activities would cost us more. That would not be equitable, given that we already deal with congestion whether driving, on foot, on bikes, or taking transit. The final plan has to take these related issues into account.  
March 14 at 11:54pm Like Reply

1706 COMMENTS - VIEW 10 MORE

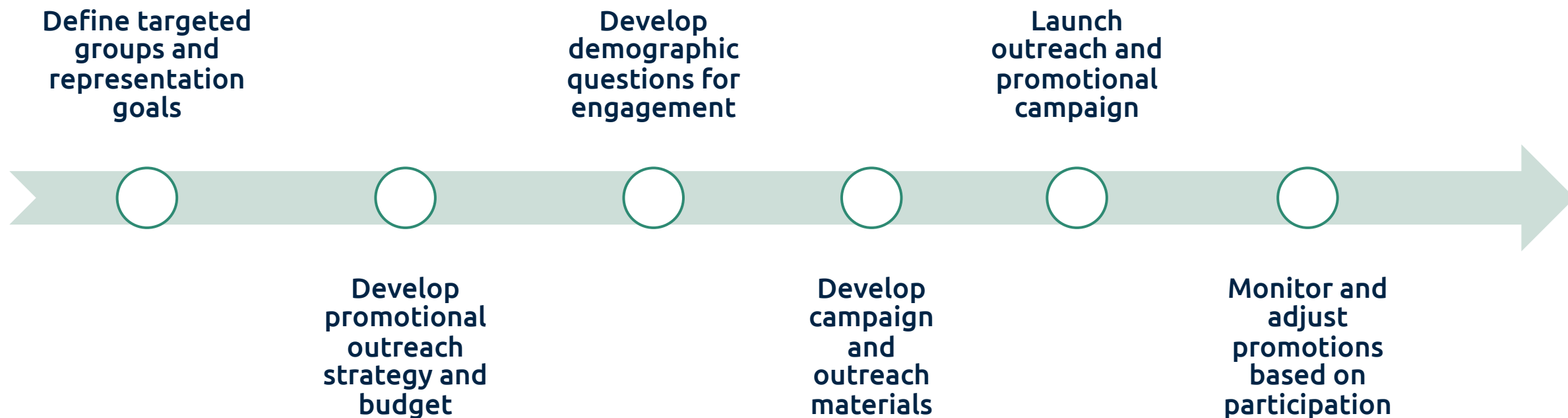
BACK NEXT



# REACH

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

# Step 1. Design a strategy and allocate a budget



# Step 2. Develop outreach and promotions campaign

## DEFINE



### Understand your audience and how to reach them

- Research demographics and identify targeted groups
- Segment audiences and understand their preferred communication channels and ways to engage

## TARGET



### Develop multi-pronged outreach and promotions campaign

- Include demographic questions in your in-person and online engagement
- Develop appropriate and compelling promotional materials

# Step 3. Launch, monitor and adjust

## LAUNCH



### Monitor and tweak your outreach

- Launch your promotions
- Execute community-based and in-person engagement activities, integrating the online platform
- Monitor and analyze participation on the platform back-end
- Continue adjusting digital ad targeting and outreach



## Case study: *It's Time* engagement program

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

### Multiple avenues for input

Developed a targeted outreach strategy with the online engagement in the region's top four languages, parallel paper surveys, and community-based events



### Promoted, monitored and adjusted

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

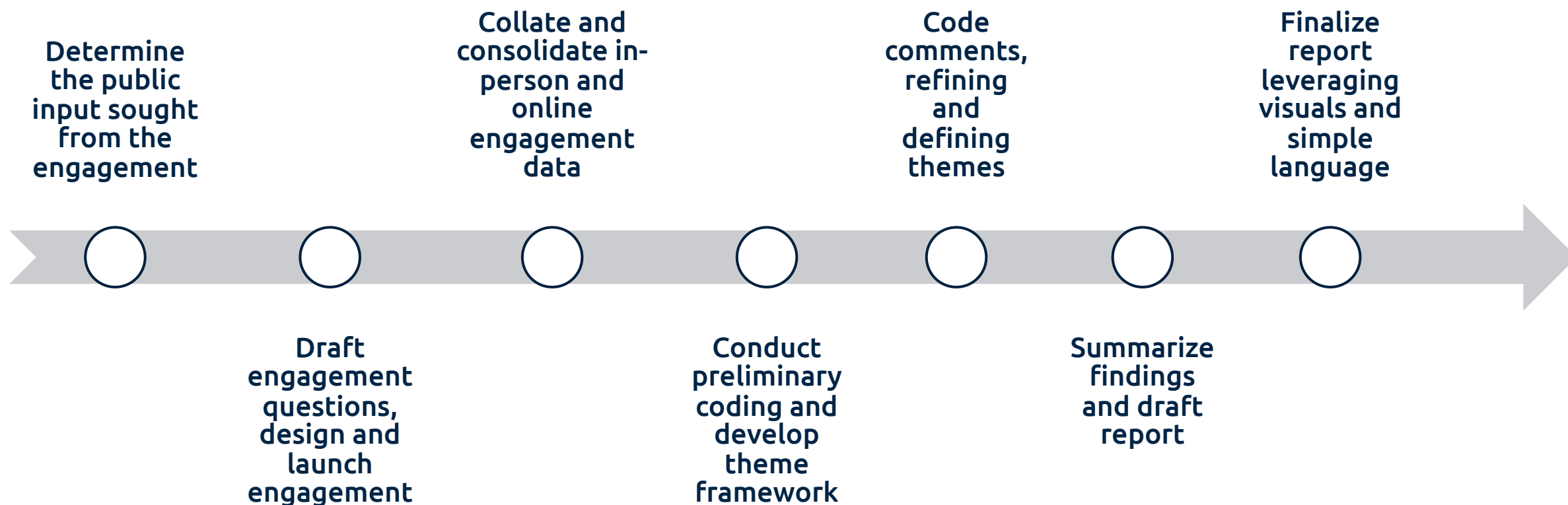




# REPORT

How to analyze and  
integrate the data to tell  
decision-makers and the  
public the story of what  
you heard

# Step 1. Allocate time and budget for data analysis





# Step 2. Continually involve your project team

1

**What do decision-makers need to know from the findings and final report?**

This will inform your themes and how you code the data.

2

**How can we demonstrate the credibility of the findings?**

This will inform how you design your engagement, interim reporting, and the online platform and tools you use.

3

**How can we best tell the story of what we heard in a transparent way to be accountable to stakeholders and the public?**

This will inform how you draft and design the report, and what kind of reporting outputs you deliver.

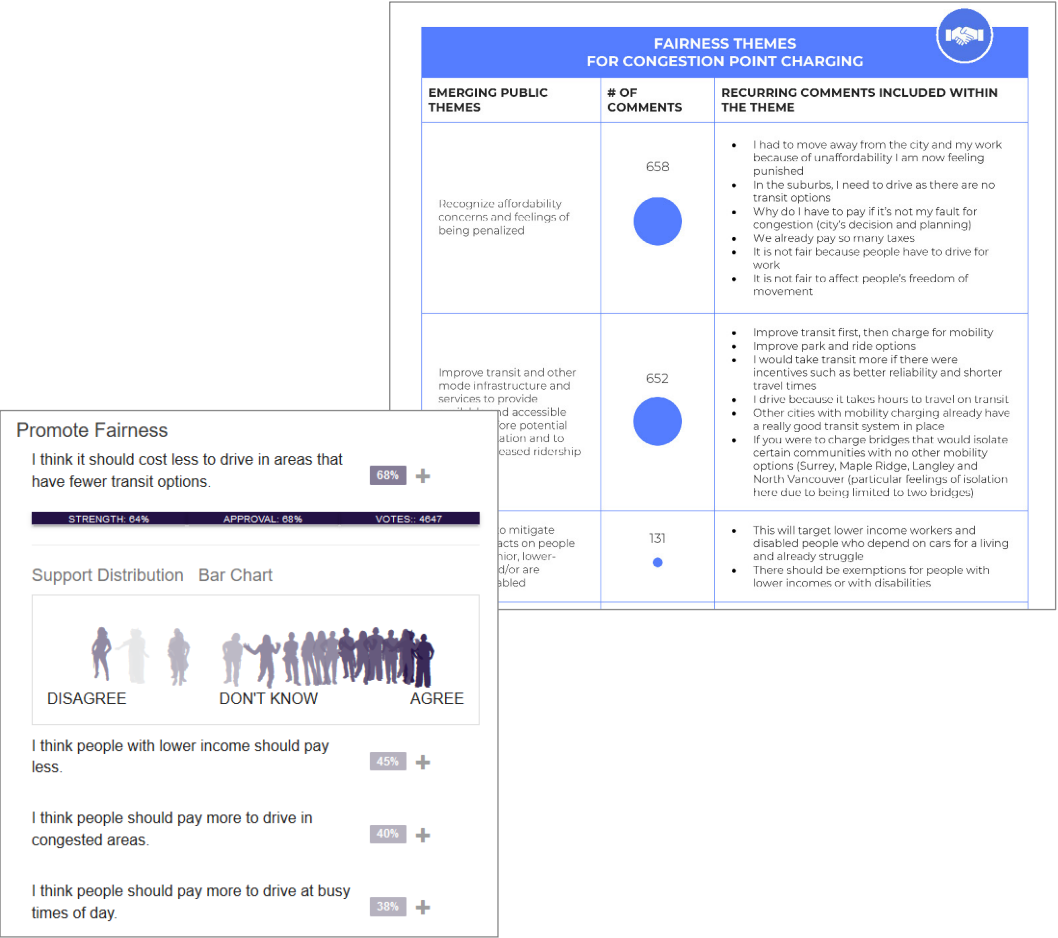


# Transparently reported back on what we heard and the views represented in the findings

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

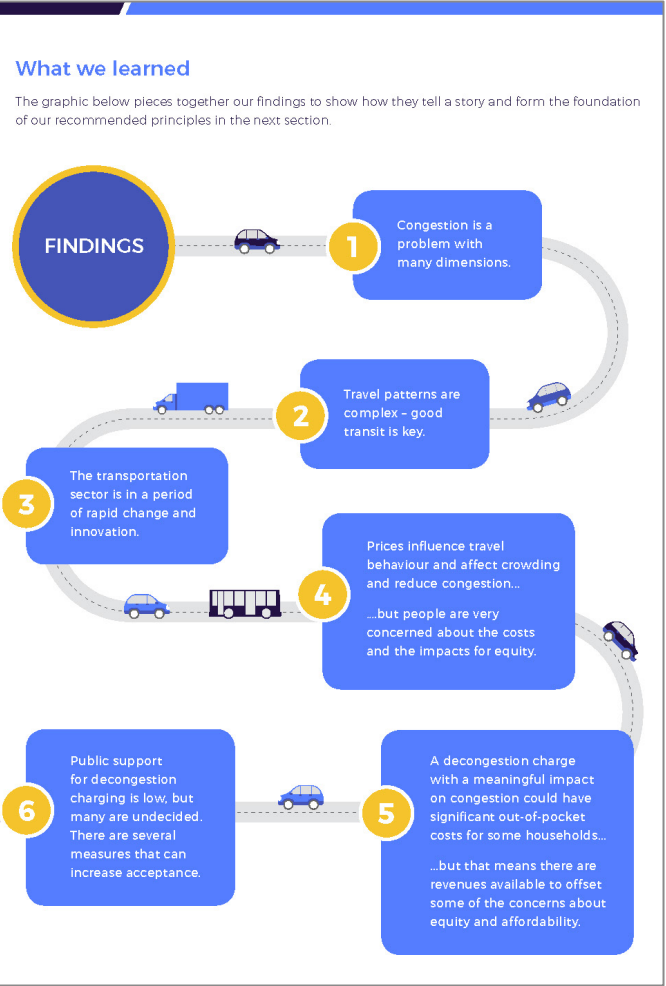
Case study:  
*It's Time*  
engagement  
program

Telling the  
story of what  
we heard

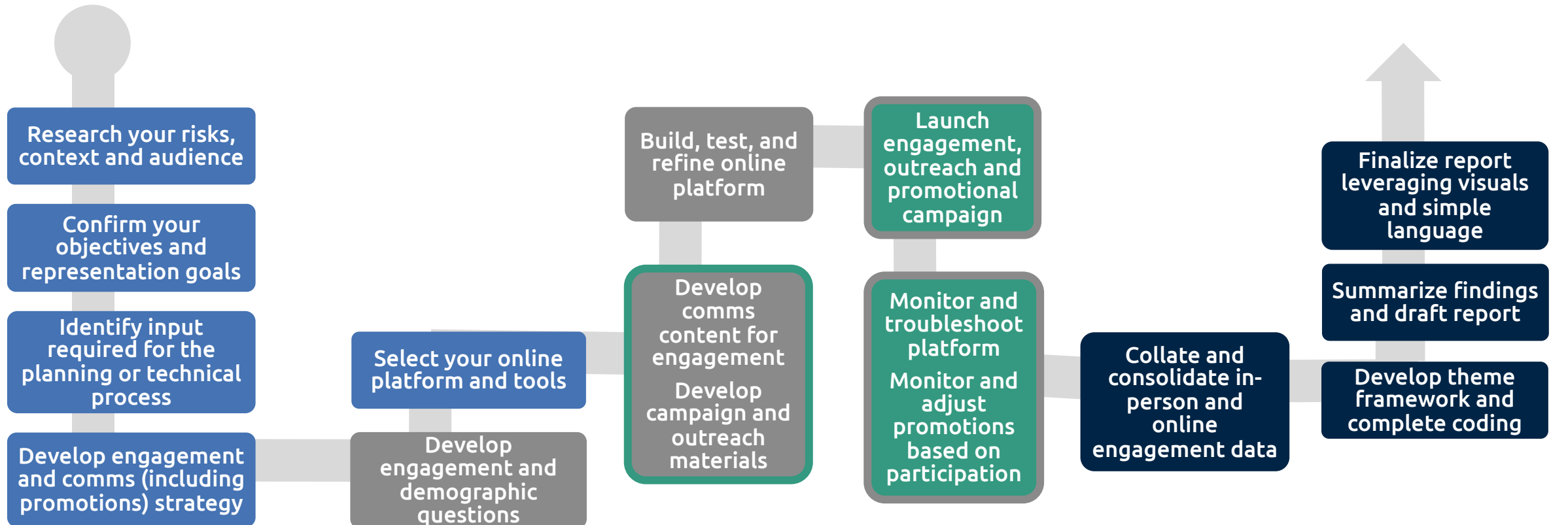


# Reported back in multiple formats

Developed sharable infographics and multilingual reports to share with the public



# Steps to designing and delivering online engagement



# Thank you for your time.

Miranda Eng, Senior Consultant  
[meng@contextresearch.ca](mailto:meng@contextresearch.ca)

Learn about us at [contextresearch.ca](https://contextresearch.ca)

