CIVIC ENGAGEMENT TEAM

Internal Guidelines

1 ENGAGEMENT WORKSHEET = ENGAGEMENT PLAN

The Engagement Planning Worksheet must be completed at the beginning of every project as it is the outline for the Engagement Plan. Building off your Engagement Planning Worksheet you will next create your Engagement Plan.

Checklist for the Engagement Plan includes the following:

- [ ] Engagement Planning Worksheet Completed (link to form)
- [ ] Engagement Activities (*examples below*)
  - [ ] Project webpage
  - [ ] Facebook Live Q&A
  - [ ] Community Council presentation
  - [ ] On-site community conversation
  - [ ] Business community outreach
- [ ] Stakeholders*
  - [ ] Internal
  - [ ] External
- [ ] Project Summary (*what is the project, how will engagement be used; informing a decision, etc.*)
- [ ] Engagement Timeline (*examples below*)
  - [ ] Develop talking points
  - [ ] Create project webpage, email address , hotline/ phone number
  - [ ] Department coordination
  - [ ] Schedule community council presentations
  - [ ] Schedule community conversations
  - [ ] FB Live Q&A
  - [ ] Language translation

**Who needs to be contacted?*

Before launching any engagement project to the public, the project manager's responsibility is to notify the Mayor's Office Liaisons, City Council's Office Liaisons, Community Councils, and other external partners (advisory boards and commissions, non-profits, and other non-government organizations) affected by the project. The Civic Engagement Team can help identify the groups to contact. And don't forget to inform the internal project team members or groups before launching any project.

And if applicable, the project manager is also responsible for requesting time on the Community Councils' agendas and scheduling meetings with external partners. The Mayor's liaisons must be notified if presenting at any Community Councils, and included in any correspondence with Community Councils.

The project manager is the point of contact when coordinating between internal and external (consultants) project teams. This process ensures that external teams do not expand past their project scope.

Most projects have multiple phases of public engagement. Every stage should include notifying applicable internal and external stakeholders and individuals who signed-up for project updates.

2 TALKING POINTS

Talking points are the building blocks for all project messaging and engagement. Talking points will help with survey language, visual communications (flyers, postcards, etc.) and helps the team be on the same page about the project.

Checklist for Talking Points:

- [ ] All the project info in one place. Used to build all the materials for the project engagement.
- [ ] Purpose and need
- [ ] Main project messages
- [ ] Planned improvements
- [ ] Outreach and education timeline
- [ ] Key statement and 3 point summary
- [ ] Project goals
- [ ] Project details
- [ ] Funding sources
- [ ] FAQ
- [ ] Contact information

3 SOCIAL MEDIA PLAN

To support and coordinate with SLC Media Services a social media plan is a must. This plan also helps Civic Engagement coordinate and schedule multiple competing social media posts.

Checklist for Social Media Plan:

- [ ] Design Mediums
  - [ ] Copy/Text
  - [ ] Images/Graphics
  - [ ] Video
  - [ ] Maps
- [ ] Social Media Platforms
  - [ ] Nextdoor
  - [ ] Facebook
  - [ ] Instagram
  - [ ] Twitter
- [ ] Post Schedule
  - [ ] Survey due date *(if applicable)*

Communication Responsibilities

The project lead or project manager may contact the Social Media team to request posting on SLCgov accounts or share a social media plan. ***Please note that consultants should not circumvent the project manager and contact SLC Media Services directly for services.***

4 REPORTING FEEDBACK

Reporting out is one of the most important parts of finishing your project engagement. It is important to let people know how their feedback was used and be transparent with what you heard. You should make the reports easy to read when possible, distill the information into an infographic along with publishing the raw results.

- ***Title page:*** Provide the survey title, date, and quick description.
- ***Table of contents*** (when applicable): Give a list of everything that's in the report.
- ***Executive summary:*** Summarize the report and its findings. Make sure it's polished. Some people only read the summary.
- ***Background:*** Explain why you launched the survey and what you plan to do with results.
- ***Survey method:*** Explain who was included in the study, target audience, contact method, etc.
- ***Survey results:*** This is the main body, which provides important statistics and actions that should be taken.
- ***Appendices:*** Provides supporting material including the actual survey and glossary of terms.

Communication Responsibilities

Share the results! Notify all applicable internal and external stakeholders (Mayor's Office, City Council, Community Councils, advisory boards and commissions, non-profits, and other non-government organizations).

5 AFTER ACTION REPORT

The [After Action Report] is used in conjunction with the Civic Engagement Guide & Engagement Planning Worksheet, to recap the engagement process for you project and is a reminder to "close the loop."

SURVEY BEST PRACTICES

Civic Engagement Project Lead requires two-weeks for preparation and design work in our surveying platform once survey questions are submitted, reviewed, and approved by the project lead. * ***Civic Engagement has final approval of survey language to ensure its readability to the general public.***

Once a survey has been drafted, review each survey question against the checklist below to make sure we are following best practices.

- [ ] Does the survey include an introduction explaining purpose of the study and duration?
- [ ] Does the survey begin with a closed-ended question?
- [ ] Do you have questions at the beginning of the survey to select appropriate survey respondents to continue with the survey?
- [ ] Do the questions go from general to specific?
- [ ] Are the demographic questions at the end?
- [ ] Are any sensitive questions toward the end of the survey?
- [ ] Do all questions relate to project objectives?
- [ ] Do you complete each topic before moving on to the next?
- [ ] Do questions use layman's terms? (*i.e. avoid use of jargon, acronyms, or terminology unfamiliar to respondents*)
- [ ] Are the questions simple and concise?
- [ ] Do the questions avoid leading words?
- [ ] Do you ask questions before describing the rating scale?
- [ ] Are all possible answer options included, or did you include an "Other" option?
- [ ] Do you allow the respondent to select "Prefer not to answer" for sensitive questions, such as income?
- [ ] Do you list answer options vertically?
- [ ] Do you display the most positive answer options first?
- [ ] Do you include a midpoint answer on rating scales?
- [ ] Are you using closed-ended questions whenever possible for data analysis? Are open-ended questions voluntary?
- [ ] Do you want to collect people's contact information (name, email, etc) to give project updates? *(If yes, include a specific question for them to opt-in to submit their contact info and receive these updates. We cannot email individuals other projects if they did not opt-in to receive those updates)*
- [ ] Have you sent the survey to colleagues or project lead to review question wording and survey timing?
- [ ] Have you pulled demographic data for project area prior to launching survey? ***(New Step)***
- [ ] Does the survey take 10 minutes or less to complete? (*5 closed-ended questions take approximately one minute, and 2 open-ended questions take approximately one minute)*
- [ ] Have you previewed the survey on mobile? Does it function properly?
- [ ] Do you have a survey close date?
- [ ] Does the survey need to be translated into Spanish or another non-English language?
- [ ] Will you/project lead be able to make decisions identified in objectives based on the data?

SURVEY DATA CLEANING & ANALYSIS

Before you analyze your survey results, data cleaning is a must-do. It helps you get the best quality data possible, so you can make more accurate decisions.

Checklist for Data Cleaning & Analysis:

- [ ] Find the fastest respondents
- [ ] Turn numeric data into graphics
- [ ] Review open-ended questions
- [ ] Remove outliers (answers that are numerically miles away from the rest of the data)
- [ ] Remove self-contradictory answers
- [ ] Remove incomplete responses
- [ ] Remove personal identifiable information

TERMS & TIMELINES OF DELIVERABLES

X	TASK/DELIVERABLE	TIMELINE	NOTES
	Engagement Worksheet Review	3 – 5 Days	
	Survey Design & Preparation (language / draft complete)	2 Weeks	
	Survey Design & Preparation (language / draft not complete)	3 Weeks	Please allow an additional week if composing survey questions is part of the scope of work
	Scrubbing & Reviewing Survey Data	2 Weeks	Turnaround time will vary depending on survey length, responses captured, and/or open-ended comments received
	Survey Report (simple)	3 – 5 Days	Manual calculation of raw survey data will extend the timeline
	Survey Report (graphic)	2 Weeks	
	Project Page Web Design	2 – 3 Days	72-hour turnaround from initial request
	Project Page Web Design Update	1 – 2 Days	72-hour turnaround from initial request
	Social Media Graphics	3 - 5 Days	
	Nextdoor Posts	0.5 to 1 day	Posting schedule will be determined by what is currently in queue
	Postcard / Mailer	3 – 5 Days	
	Flyer / Poster	3 – 5 Days	
	FAQ	3 – 5 Days	
	Facebook Live Coordination	2 Weeks	Coordinate with SLC Media Services
	Language Translation	5 – 7 Days	
	Press Release	5 – 7 Days	