City of San Diego – Inclusive Public Engagement Guide

Focused Discussion Group Meeting #4: "Engagement Techniques and Pilot Engagement Activities"

Meeting Summary Report

Meeting held May 24, 2023

Prepared by:

City Planning Department

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Focused Discussion Group Meeting #4

Meeting Details

May 24, 2023 – 6:00-8:00 PM
Dolores Magdaleno Memorial Recreation Center
2902 Marcy Ave, San Diego, CA 92113

Meeting Overview

The purpose of Focused Discussion Group (FDG) Meeting #4 – Engagement Techniques and Pilot Engagement Activities – was to provide information about different engagement techniques, discuss creative engagement techniques, introduce the Infrastructure Prioritization initiative, and hear the group's ideas for pilot engagement activities to support infrastructure prioritization in the Southeastern Community Planning Area (CPA).

Meeting Participants

Focused Discussion Group

- Candice Carr
- Rebecca Egipto
- Rachel Graham
- Andrea Hetheru
- Tanisha-Jean Martin

- Christine Millena
- Ethan Ramirez
- Danielle Knauff Raykowski
- Andrea Schlageter
- Marry Young

Project Team

City of San Diego

- Anisha Gianchandani, Program Manager, City Planning Department
- Cristhian Barajas, Senior Planner, City Planning Department
- Eduardo Hernandez, Senior Planner, City Planning Department
- Colette Redon, Senior Planner, City Planning Department
- America Aceves, Assistant Planner, City Planning Department
- Helen Weldeghiorgis, Program Manager, Department of Race and Equity

Kearns & West (meeting facilitation)

- Brisa Aviles
- Joan Isaacson
- Jasmine King

Imagine (meeting facilitation)

- Catherine Schrock
- Peter Schrock

Meeting Activities and Input

The project team welcomed FDG members and shared the focus topics for Meeting #4:

- Engagement techniques
- Gallery walk
- Creative engagement practices
- Infrastructure Prioritization pilot engagement activities

Engagement Techniques

The project team reviewed the public engagement techniques worksheet distributed at Meeting #3. Project team members explained how engagement techniques can relate to different levels of engagement, describing also how the level (or purpose) of engagement is selected based on project needs. They provided an overview of various engagement technique objectives including sharing information, collecting input and bringing people together. Examples of techniques to share information included providing briefings, distributing flyers and sharing via email or social media; techniques for collecting input included interviews, surveys and pop-up events; and techniques for bringing people together included workshops, field trips and advisory groups.

The project team introduced a gallery walk activity in which FDG members were invited to review display boards which posed questions about engagement techniques and various engagement elements that could make an engagement event successful. FDG members were asked to post sticky-note responses to the questions posed on the boards. After completing the gallery walk, FDG members shared what they took away from reading other participants' comments.

Figure 1: Focused Discussion Group members participating in the gallery walk activity and viewing what other participants wrote on the boards.

FDG members' suggestions from the gallery walk activity included:

- Develop clear engagement and communications materials and share them with community-based organizations and on social media.
- Provide food and childcare and ensure availability of parking as well as other transportation options to help reduce barriers and encourage attendance at community meetings and events.
- Schedule meetings or events on weekday evenings and weekends to provide people who work and families the opportunity to attend.
- Greet community members when they walk in and provide an overview of what will happen at the event.
- Take notes of people's input to show their input is being taken seriously.
- Send email reminders to improve outreach and provide follow-up after an engagement event or meeting to keep people engaged.
- Facilitation suggestions: encourage everyone at the event to participate, provide visual examples of presentation concepts, have a clear agenda and provide moments for conversation among participants.
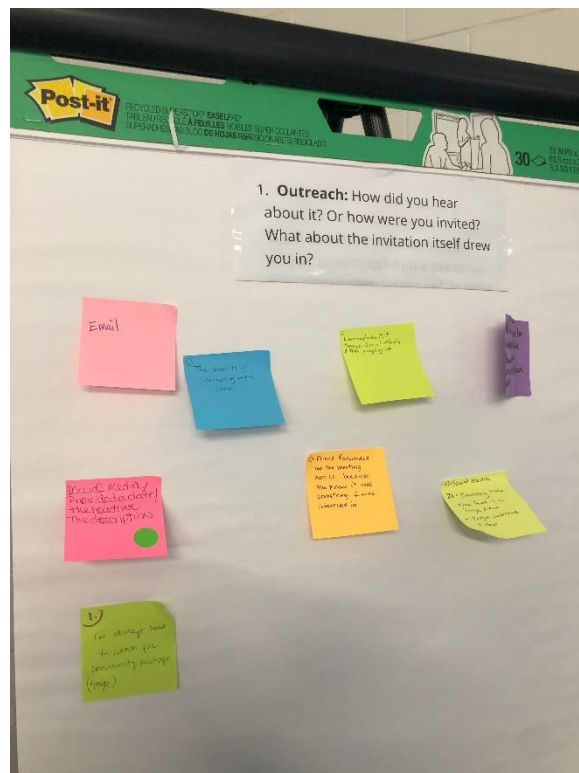

Figure 2: Focused Discussion Group members' responses to the questions on outreach.

Creative Engagement to Prioritize Infrastructure Projects

Project team members provided an overview of the background and goals of the Capital Improvements Program (CIP), namely, that the CIP was created to develop a multiple-year forecast of the City's capital needs, assess all City infrastructure projects needed, enhance people's quality of life and serve as an economic development tool for the City. The project team also described Imagine's role in assisting with the pilot engagement events to get public input on infrastructure priorities. Imagine is a creative engagement consultant working at the intersection of applied theatre, multimedia arts and community development. They use the arts to educate, connect and inspire communities to participate. Imagine was brought on to work on the Inclusive Public Engagement Guide to support with creative

techniques to engage San Diego community members from various age groups, including youth and older adults, and to implement inclusive engagement for the infrastructure prioritization pilot engagement activities. The project team presented the project timeline and Imagine's role in supporting the evaluation process of the pilot engagement activities.

The project team noted that the engagement format for these pilot activities was still being determined. The project team presented examples of event designs that meet the goal of gathering input to inform CIP priorities. Imagine presented their approach to creative engagement techniques for in-person events, noting the importance of inclusive engagement. They shared that inclusive engagement happens when people experience being genuinely welcomed to a space, a sense of belonging and connection and proper accommodations for broad and equitable access. The project team shared several examples of what those experiences might look like such as using music, sharing stories and experiences and accommodations like childcare or child-friendly activities.

In a roundtable discussion, FDG members were invited to share feedback on the information provided about creative engagement techniques.

FDG members' feedback included:

- Imagine's creative techniques showed a new way of learning people's interests through interview theatre. This engagement method should be shared with others.
- Creative techniques can also be used to gather and share people's feedback with various audiences (e.g., politicians).
- The use of creative techniques with youth community groups is valuable in the ways it can make space for people's stories. These techniques can also train youth to develop photography skills and visually capture their neighborhoods. This approach with youth creates an opportunity to learn what they are experiencing, support them in becoming more informed and encourage them to become more involved.
- Some previous engagement efforts have focused on framing only what some communities lack instead of highlighting the positive aspects of those communities. The messaging from these engagement efforts may have discouraged some youth from participating since they did not want to hear about the negative aspects being shared about their community. It is important to acknowledge the positive assets within our communities.

- Some community members and groups have a long history of advocating in their community and have felt left out from being heard. It is also essential to include them to participate in the engagement process.

Infrastructure Prioritization Pilot Engagement Activities

The project team shared that FDG members would have an opportunity to help shape how engagement to collect input about infrastructure priorities in the City's Southeastern Community Planning Area (CPA) would be implemented. Project team members provided information about the Capital Improvements Program's importance, who manages it, and how projects are prioritized through the Infrastructure Prioritization initiative. The project team shared several prioritization scoring factors, how community input has traditionally been collected and how the City could collect input going forward.

The project team explained that project ideas from community members are considered for a citywide five-year infrastructure plan, and that after the infrastructure plan is adopted, the City posts a public report detailing each community's priorities and the final selected projects.

The project team provided information about what had already been accounted for in the two upcoming engagement events in the Southeastern CPA, such as the dates within which the events could occur, possible venues for engagement, and what input on infrastructure needs from the community had already been collected in the past. The project team also outlined the allocated engagement budget and staffing. The project team shared that FDG members would be able to help inform the date, time and location of the two engagement events, the format of the events (in-person or other), what engagement techniques would be used and the follow-up process with participants. Project team members shared upcoming community events that could serve as potential opportunities for an in-person engagement event.

The project team noted that Imagine would report back in the final Focused Discussion Group meeting regarding lessons learned from these two engagement events, as part of the purpose was to "pilot" different engagement techniques to understand what works and what the City can improve upon in the future.

FDG members were asked to share their ideas for engagement for the pilot engagement activities in a small group discussion. Following the discussion, each

small group shared its engagement event ideas and other suggestions with the larger group.

FDG members' ideas for a potential engagement event in the Southeastern CPA included:

- Host an engagement event at a library, community center, or park with pop-up activities and/or walking tours.
- Participate in events already organized in the community.
- Create promotional outreach materials in different languages and use language that resonates with people other than 'infrastructure' (e.g., streets, trees, walkways).
- Host a virtual meeting with chat rooms for activities and Spanish interpretation.
- Use social media to promote the pilot engagement activities.
- Host an in-person event during the evening with interactive activities using street maps and 3-D renderings to help participants determine some possible infrastructure project ideas.
- Provide snacks and incentives.
- Use laptops or iPads for activities and include a dot activity or thought exercises to collect input.
- Use an evaluation or survey to help determine the success of the engagement events and provide follow-up.

The project team concluded the session by reviewing the next steps for the next meeting and take-home assignments (see Appendix).

Appendix: Meeting #4

The Appendix includes the worksheets and other materials sent home with FDG members for their reference during the meeting or completion in preparation for their input on the Meeting #5 topics (Reporting Back and Identifying Metrics of Success). A list of the materials is included below.

1. Engagement Techniques Toolbox Worksheet
2. Follow Up and Metrics of Success Worksheet
3. Infrastructure Prioritization – Event Planning

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Meeting #4

Focused Discussion Group

Engagement Techniques Toolbox Worksheet

This worksheet aims to build an understanding of inclusive engagement techniques and what to consider when planning for engagement. The toolbox (below) lists the technique and description and typical application. *Adapted from IAP2 - International Association of Public Participation, https://www.iap2.org.

Technique and Description	Typical Application
Briefings: A regular meeting to provide an opportunity to inform and educate.	***Share Information:*** The opportunity to reach various individuals by sharing a presentation with a stakeholder group.
Hotlines: A separate line for public access to pre-recorded project information or to reach project team members who can answer questions and obtain input.	***Share Information:*** An easy and direct method to provide updates on project activities, etc. Designated contacts should have sufficient knowledge to answer most project-related questions.
Electronic forums, social media groups, and email: Sharing electronic information to notify stakeholders when new materials are posted, invite them to upcoming meetings, distribute comment and evaluation forms, share meeting summaries, collect comments and input, etc.	***Share Information:*** Inexpensive process to directly reach stakeholders and allows people to share electronic emails with others.
Printed Public Information Materials: Information materials such as fact sheets, newsletters, brochures, issue papers, progress reports, direct mail letters, etc., can be developed for printing.	***Share Information:*** A mechanism to reach a large target audience for technical and legal reviews, encourages written responses through comment forms, and facilitates documentation of the public involvement process.
Press Releases and Press Packets: A press release contains a statement or story prepared for distribution to media outlets, including press packets that provide resources, background information, and contact information.	***Share Information:*** These communication tools help inform the media of project milestones, provide the press with specific language to include for articles and other media releases, and serve as a resource for technical and legal reviews.
News Conferences: A collective interview given to multiple media outlets to assist with engagement efforts.	***Share Information:*** This approach creates an opportunity to reach all media in one setting. Make sure all speakers are trained in media relations.
Interview Theater: Interviews with community members are recorded, transcribed, and turned into a script from the interviews.	***Share Information:*** The performance is intended to create a humanizing way to listen to what the community is saying about the topic.

Focused Discussion Group
Engagement Techniques Toolbox Worksheet

The toolbox (below) lists the technique and description and typical application. *Adapted from IAP2 - International Association of Public Participation, https://www.iap2.org.

Technique and Description	Typical Application
Information Kiosks: A station where project information is available to build awareness.	***Share Information:*** The strategy allows reaching many people and the use of computer technology can be applied to make the kiosk interactive and gather comments.
Internet Surveys/Polls: Web-based responsive polls used for outreach and engagement efforts	***Collect and Compile Input:*** Collects input from a cross-section of the public not on a mailing list or unlikely to attend meetings. Convenience of providing survey questions in a web format.
Interviews: One-to-one meetings with stakeholders to gain information for developing or refining public participation and consensus-building programs	***Collect and Compile Input:*** The technique allows in-depth information to be exchanged in a relaxed forum. It also allows all stakeholders to share feedback.
Mailed Surveys and Questionnaires: Randomly mailed inquiries to a sample population to gain specific information for statistical validation.	***Collect and Compile Input:*** A benefit this process produces is collecting input from individuals unlikely to attend meetings that include a cross-section of the public, not just community activists
Telephone Surveys/Polls: Random telephone sampling to gain specific information for statistical validation	***Collect and Compile Input:*** Provides input from individuals unlikely to attend meetings. Provides input from a cross-section of the public, not just those on a mailing list.
Comment Forms: This tool collects public input and preferences through mail-in forms often included in fact sheets and other project mailings.	***Collect and Compile Input:*** Comment forms create a mechanism to expand mailing lists and increase collecting input from people unlikely to attend meetings
Community-Based Organization Partnership: Contracting with qualified local community organizations to conduct project outreach.	***Collect and Compile Input:*** Helps promote community-based involvement and capitalizes on existing networks enhancing project credibility.

Focused Discussion Group
Engagement Techniques Toolbox Worksheet

The toolbox (below) lists the technique and description and typical application. *Adapted from IAP2 - International Association of Public Participation, https://www.iap2.org.

Technique and Description	Typical Application
Charrettes: A longer workshop session where participants provide recommendations on design projects.	***Bringing people together:*** This method helps promote joint problem-solving and creative thinking.
Fairs and Events: A main event with multiple activities to provide project information and raise awareness.	***Bringing people together:*** Focuses public attention on one engagement element which allows for different levels of information sharing and is conducive to media coverage.
Open Houses: An open house has several informational stations, each addressing a separate issue. A resource guide can assist participants in touring through the exhibits at their own pace.	***Bringing people together:*** This event format helps foster small group or one-on-one communication and the ability to draw on other team members to answer difficult questions. The events are less likely to receive media coverage but help build credibility.
Focused Discussion Groups: Selected participants can share their lived experiences and perspectives and provide feedback on topics and specific needs in the community.	***Bringing people together:*** The method allows participants to provide in-depth recommendations on policy initiatives.
Ongoing Advisory Groups: A group of representative stakeholders assembled to provide public input to the planning process.	***Bringing people together:*** Participants gain an understanding of other perspectives that can lead toward compromise and details for project issues can be shared through this process.
Tours and Field Trips: The technique offers key stakeholders, elected officials, advisory group members and the media with an onsite tour.	***Bringing people together:*** The technique creates an occasion to develop rapport with key stakeholders and allows stakeholders to better understand project nuances.
Panels: A group assembled to debate or provide input on specific issues.	***Bringing people together:*** Helps build credibility if all perspectives are represented and dispel misinformation.

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Engagement Techniques Toolbox Worksheet

The toolbox (below) lists the technique and description and typical application. *Adapted from IAP2 -
International Association of Public Participation, https://www.iap2.org.

Technique and Description	Typical Application
Workshops: An informal public meeting that may include presentations and exhibits but ends with interactive working groups.	***Bringing people together:*** An opportunity for discussion on criteria or analysis of alternatives; helps foster small group or one-to-one communication to answer difficult questions. This format builds credibility and maximizes feedback obtained from participants through public ownership in solving problems.
Public Hearings: These formal meetings are scheduled presentations offered to the public to state opinions/positions that are recorded individually.	***Bringing people together:*** The hearings provide an opportunity for the public to speak without rebuttal.
Public Meetings: These organized meetings are open to the public at large and are used to make a presentation and allow the public to ask questions and give comments.	***Bringing people together:*** Participants are able to hear relevant information and have an opportunity to ask questions and comment.
Web-based Meetings: The meetings occur via the Internet to increase public engagement.	***Bringing people together:*** A cost and time-efficient method to reach a broad audience by participating at different times or at the same time.

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Follow up and Metrics of Success Worksheet

This worksheet will assist you with brainstorming discussion points on metrics of success for our next meeting. Please refer to the questions below.

How do you determine when engagement is successful? (e.g., attendance, representativeness, active participation during event, trust-building, reach, etc.)

How can the City best follow up with community members who have participated in engagement events?

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FDG#4 Infrastructure Prioritization – Event Planning

Preparing for an engagement plan and related activities requires determining the engagement level, engagement goals, etc. Please refer to the *Engagement Planning Checklist* and *Public Engagement Techniques Worksheet* for further details on the engagement categories to consider when developing your event planning.

Step 1: The *Engagement Planning Checklist* contains important engagement categories for planning considerations, event logistics, and follow-up. The table below contains questions from the *Engagement Planning Checklist* to assist your team brainstorm your plan and activity.

Engagement Event Considerations

Planning Considerations	Event Logistics	Follow-up
1. Where are we engaging? **Southeastern Community Plan Area (CPA).** 2. What are our constraints? **Events need to take place June 16 – June 25 and be cost-efficient.** 3. Who needs to be engaged? **People who live, have interest, or would benefit from infrastructure investments in Southeastern CPA.** 4. What is the purpose of engagement? **Gather community input on local infrastructure needs in the Southeastern CPA.** 5. How will we share information?	6. What will the event look like? 7. What specific engagement techniques work best? 8. What dates and times would work best? 9. How will we document input?	10. How will we follow up and report back to participants?

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FDG#4 Infrastructure Prioritization – Event Planning

Scenario:

Step 2: After reviewing the *Engagement Event Considerations Table*, you can review the purpose and level of participation to develop further your engagement activity ideas (e.g., pop-up event, meeting, etc.).

- The **general purpose** is to understand the infrastructure projects Southeastern community members want to see in their neighborhood (e.g., parks, streetlights, street or sidewalk improvements, libraries, etc.)

- The **level of participation** is to **consult** the Southeastern community on infrastructure needs and assist the City with prioritizing infrastructure projects.

Engagement Activity Planning:

Step 3: Please refer to the template (below) to support your group in developing your engagement ideas for this project. Your group will also identify one member from your group to report back.

Before the Engagement Event

Focused Discussion Group

FDG#4 Infrastructure Prioritization – Event Planning

During the Engagement Event

After the Engagement Event