

locality

the power of community

Listen, learn, adapt:

Engaging your community
in a meaningful way

A community engagement
toolkit for voluntary and
community sector organisations

Introduction

You have an amazing idea for a project or service that could transform the lives of people in your community. This could be an advice service, a community 'library of things', a rural transport scheme, a neighbourhood plan, or a clothing exchange.

Before embarking on this adventure, you need to ask yourself some key questions: how do you ensure the people who would benefit from your idea find out about you? How do you know whether your proposal really fills a local need and isn't replicating other work? How do you find local people or businesses interested in volunteering or even funding your idea?

The answer to these questions, and one of the key factors in the success of your project, is community engagement.

This toolkit will explore and explain various traditional and digital community engagement tools and techniques, providing an overview of how they work and when best to use them. We will also show what successful community engagement looks like, highlighting real life examples from across the country¹.

Traditional and in-person engagement techniques, such as stalls and focus groups, remain important and effective ways of reaching people. These methods are particularly useful for communicating with hard-to-reach, digitally excluded parts of your community – this includes some disabled groups, older people and people with low incomes.

However, there are now numerous ways of reaching people in our neighbourhoods online – indeed digital methods of communication sit at the heart of our lives and must be incorporated into any effective communication strategy.

The toolkit is designed to be a reference and information source for all voluntary and community organisations looking to inform, empower, consult, or collaborate with the communities they are embedded in and serve. Chapters 1, 2 and 3 can be used by any organisation interested in learning about community engagement, while chapter 4 will be of specific interest to Neighbourhood Planning groups.

There is no right or wrong approach to community engagement because every community differs in its characteristics – its needs, composition, history and

¹ Although the examples and case studies we use are from neighbourhood planning groups, the tools and techniques are applicable to all voluntary or community sector organisations.

interests. Successful community engagement is about making people feel that your project or idea is meaningful to their lives and inspiring them to want to participate in your future work.

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Chapter 1 – Before you choose your tools and techniques

Aims, audience and limitations

There are three key questions to ask yourself before deciding on what community engagement techniques to use.

- What are your aims?
- Who do you want to engage?
- What are your limitations?

The answer to these questions will be key to helping you decide which engagement techniques you should choose.

What are your aims?

Think carefully about what you're looking to achieve from your community engagement process and how you are going to measure your success. This will be entirely dependent on your idea or project. Set yourself some SMART targets from the outset.

Specific	Measurable	Achievable	Relevant	Timebound
Set targets that are well-defined and clear.	What metrics are you using to determine your progress?	Set a target that is possible to achieve – given your strengths and limitations.	How does the target fit in with your wider goals?	Set timeframes and work out how you will track your progress against these.

Who do you want to engage? Who is your audience?

Who is going to be affected or benefit from your idea or project? Is it the whole community or a specific demographic? You should consider where your audiences find their information and what would inspire them to get involved in your project. Successful and meaningful community engagement usually involves using multiple engagement tools and techniques each targeted at reaching different parts of a community.

What are your limitations?

Different groups will face different limitations and challenges – from a lack of resource, to a lack of time, to a lack of skills or knowledge. These limitations must be considered carefully before choosing which engagement techniques to employ. For example, some engagement techniques are free while others have a significant cost attached. Some engagement techniques take days while others may take years.

Levels of community engagement

You should also think carefully about the role that you are asking your community to play in your project planning and decision making. The [International Association of Public Participation \(IAP2\)](#) has identified 5 levels of public participation. You should be clear to your community, and to yourself, about the purpose of your engagement. This will influence the engagement tools and techniques you choose, and also help avoid any later misunderstandings.

	Inform	Consult	Involve	Collaborate	Empower
Participation goal	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives and/or solutions.	To obtain public feedback on analysis, alternatives and/or decision.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the preferred solution.	To place final decision-making in the hands of the public.
Promise to the public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

Table from [IAP2](#)

Inclusive engagement

It is vital that the tools and techniques you choose will not exclude people whose lives may be affected by your idea or project.

When thinking about which engagement tools to choose you should consider the barriers people may face to participation, and how you can overcome these.

Some of the 'hard to reach' or frequently excluded groups you should think about include:

- Older people e.g. digital exclusion
- Younger people e.g. use of unrelatable language
- People with sensory impairments e.g. lack of adjustments
- People with learning disabilities e.g. use of inaccessible language
- People with physical disabilities e.g. physical accessible venues (ramps etc.)
- People living in remote or rural areas e.g. events in inaccessible locations
- People with language or cultural barriers e.g. lack of relevant translations
- People with socio-economic barriers e.g. costs to attending events or devices for digital engagement
- People with time constraints e.g. work or childcare

Each of these groups will face different challenges and will therefore require different adjustments or types of engagement to participate in a meaningful way.

Case Study: East Street Arts

Putting art at the heart of community engagement

East Street Arts is an artist-led charity in Leeds and the first arts organisation to lead on a neighbourhood plan.

Through their creative approach to community engagement, they have succeeded in reaching and inspiring people from across their community to get involved in the neighbourhood planning process.

Their neighbourhood plan focusses on the Mabgate, Burmantofts and Lincoln Green area of Leeds. This is a highly diverse area, with sizable Eastern European and refugee communities. There are 75 different languages spoken in a population of 10,000 people. Moreover, this neighbourhood has high levels of socio-economic deprivation.

Aware of these challenges, East Street Arts have been careful to tailor their community engagement to capture the thoughts and feelings of the most hard-to-reach and vulnerable parts of their community.

The neighbourhood plan community engagement is being led by two artists, Kat and Dahab, who have social engagement at the heart of their practice. As Helen Moore, Engagement Lead at East Street Arts explained:

“We started with some remote community projects over the summer – a summer where face to face communication was hampered due to the (Coronavirus) lockdowns. This included a ‘gift exchange’. We put out a call across the neighbourhood for people to create a piece of art of their choice to gift to a neighbour they didn’t yet know. Although there was no theme given, many people decided to base their artwork on their community. As well as building awareness of the plan, this helped to combat isolation in a very difficult time – a number of people who took part have been inspired to meet those they swapped their art with, once safe to do so”.

This initial activity (and the publicity it received) gave the project a real momentum and led to a surge of interest in the neighbourhood forum (the group preparing the plan) and plan. However, East Street Arts were very aware of the need to reach all key communities for the plan to be truly representative.

One of the main issues they faced was that many people in the area do not have reliable internet access. As Helen explained: “There is a lot of digital poverty in the area – a lot of people aren’t online. 50% of people interested in becoming forum members don’t have reliable digital access – sometimes due to knowledge or skills, but often due to the cost of data”. For this reason, there was a particular

focus on postal and phone-based engagement (with in-person engagement kept to a minimum due to Coronavirus restrictions).

They also created a community zine, published in both paper and digital formats. This was filled with community news, including stories about the art gift-exchange, interviews with residents and a feature on East Street Arts' wider community projects. 5,000 of these zines were printed, and translations were made into the main community languages including Polish, Kurdish Sorani, Tigrinya, and Romanian.

At the same time, East Street Arts were using a wide range of other tools and techniques. Question and Answer events were hosted online - giving people an overview of the neighbourhood forum, and an understanding of the purpose and power of a neighbourhood plan (including its limits). Short films were created about the neighbourhood forum and the impact of neighbourhood plans. Community leaders were identified and invited to provide their input and ideas.

East Street Arts will soon be kicking off a skills audit, aimed at bringing in people from across the community with the knowledge and expertise they need to address core issues facing the community - from green spaces to transport to retail.

Although there will, of course, be the need for technical or infrastructural debates, art and creativity will remain at the very heart of this unique planning process.

Chapter 2 - Traditional and in-person forms of community engagement

In this chapter we identify and outline the advantages and challenges of 'traditional' and in-person community engagement methods. These range from community boards to newsletters, public meetings to focus groups.

Although there is a lot of emphasis on the importance of using digital engagement techniques, many traditional and in-person methods remain highly effective and will always have their place in community engagement. These methods frequently feel more personal and can provide more nuanced, in-depth feedback and involvement.

These methods are particularly useful for communicating with hard-to-reach, digitally excluded, and marginalised parts of your community. These often, though by no means exclusively, include people with low incomes, parts of the disabled community, some older people, and foreign language communities. It is important to consider this when choosing what engagement methods to use for your project.

Public meetings

Public meetings or community forums are meetings held in public spaces that are usually open to anyone within your community.

Meetings like this are best used as a means of providing information about a project or idea and then receiving feedback - giving members of the community a chance to ask questions, voice concerns etc.



Best used for: Engaging large groups and gauging broad public opinion.

Advantages	Challenges
<p>A good way to widely disseminate ideas, share plans or information and gauge general opinion.</p> <p>They show transparency, openness, and willingness to listen.</p> <p>They are a good way to engage a wide audience and get broad-based community input.</p> <p>The public nature of these events can get media coverage or attention for your cause.</p>	<p>Participants may not come from a broad enough range of interests and needs. For example, those who attend these public meetings are often from relatively engaged parts of the community, or who are time rich.</p> <p>Many people do not have the confidence to speak in an unguarded way in public forums (they are not always considered to be 'safe spaces').</p> <p>They are a good space for information giving but not ideal for constructive dialogue or consensus building.</p> <p>It is difficult to guarantee the makeup of attendees.</p>

Focus groups and workshops

Focus groups and workshops involve getting small, targeted groups of people together for in-depth discussions.

They are a great way of encouraging open, honest dialogue around specific issues. The small, informal nature of these groups gives people who would not otherwise feel confident, the chance to give their views. This also makes them ideal for getting the views of marginalised or excluded groups.

Best used for: Gathering in-depth understandings, reaching marginalized groups and problem solving.

Advantages	Challenges
<p>They are a great way of reaching specific group stakeholders or parts of the community.</p> <p>They can provide safe, comfortable places for people to voice their views and opinions. They are therefore good for engaging marginalised groups.</p> <p>They can allow for genuine dialogue rather than back and forth ‘opinion giving’.</p> <p>They can be useful for communal problem solving.</p>	<p>They are not an effective way of reaching large numbers of people or gauging majority views.</p> <p>They require careful planning, appropriate materials and should be run by skilled facilitators.</p> <p>You will need to have knowledge of your community to ensure the focus groups are representative of those whose views you are looking to capture.</p>

Stalls and pop-up installations

Stalls or pop-up installations can be a really effective way of sparking conversations with people in your community.

Opportunities may arise to have stalls at local events – from fetes to industry fairs. You may also choose to hold stalls in spaces in your community that receive high footfall such as market squares, train station entrances, and high streets.

Stalls and pop-up installations enable people to interact and engage with you in a variety of ways – picking up fliers, taking part in post-it-note sticker polls, using a ‘voting box’, or engaging in detailed one to one conversations.

Best used for: Sparking conversation, information dissemination and light-touch opinion gathering.



Advantages	Challenges
<p>A great way of increasing knowledge and sparking interest in your project or idea.</p> <p>Can be combined with a range of micro-engagement techniques – from post-it-note polls to voting boxes (See page 22 for more detail).</p> <p>An opportunity to hand out detailed materials that can be read later.</p> <p>Often allows time for personal one to one conversation.</p> <p>Can capture a broad range of people, including ‘walkers by’ who may not usually engage with public meetings etc.</p>	<p>The people you reach were not originally there to engage with you, you may not have their full attention.</p> <p>Those you engage are likely to represent a small segment of your community.</p> <p>Not an ideal space for targeted, in-depth dialogue or consensus building.</p>

Open days

Sometimes the best way to engage people with your work or idea is to open your doors and show them the space you work in, the area you plan to transform or give them a taste of the service you plan to provide. Open days are a great way of doing this.

Your open day may include ‘taster’ sessions, opportunities to speak to facilitators or project leads, or tours of your facilities.

Best used for: Making your project tangible to your community and inspiring them to get involved.

Advantages	Challenges
<p>The physical, visual nature of open days can make your idea or project feel far more tangible – and inspire people to get involved.</p> <p>They are a great way of disseminating information and allowing people to ask questions.</p>	<p>You need to think carefully about accessibility issues.</p> <p>They are not the ideal set-up for constructive dialogue and in-depth discussion.</p>

Transect walks

Most often used in town planning, transect walks are guided walks through an area that is facing development or transformation.

During or after the walk participants often draw a map with their observations, risks, and potential solutions. These walks enable you to gather specific geographic and demographic knowledge.



Best used for: Gaining an in-depth understanding of an area and community needs.

Advantages	Challenges
<p>Highly participatory, flexible, and relatively easy to put on.</p> <p>Seeing things in person can deepen or change your understanding of an area, as well as that of participants.</p> <p>Can be an effective way of allowing your community to guide the conversation and point to the issues that matter most to them.</p>	<p>You will only capture your place at a specific time – for example often the issues faced by a community differ between night and day.</p> <p>Walks are likely to attract a specific demographic (and exclude others for accessibility reasons).</p> <p>In situ activities always have health and safety issues to consider.</p>

Transect walks are often used as part of a Placecheck.

Posters, banners, and community noticeboards

Posters, banners and community noticeboards are a great way of informing people about your project or how to attend more participatory events.

These are relatively cost and time effective, enabling you to reach people without needing to be physically present.

Best used for: Informing people of your work in a simple, cost-effective way.



Advantages	Challenges
<p>A simple, relatively cost-effective way of informing people about services, activities etc.</p> <p>People will often walk past and therefore read a poster more than once - giving your message time to embed itself.</p>	<p>They are only suitable for information dissemination; they should usually be used to support more in-depth forms of engagement.</p> <p>You need to ensure you have the right permissions for using poster noticeboards.</p> <p>This is not an effective way of engaging marginalized or excluded people.</p>

Flyering

Like posters, flyers can be a highly effective way of reaching people. Whether handed a flyer on the street or seeing it slip through a letter box, there is a good chance you will grab people's attention - if only for a second.

However, there are costs to consider (financial, environmental etc.) Moreover, this method only works at the most basic (informing) engagement level.

Best used for: Disseminating information to a large group of people in a geographic area quickly.

Advantages	Challenges
<p>Door to door or targeted street flyering around specific neighborhoods can be an effective way of disseminating information quickly.</p>	<p>Flyering is sometimes considered a nuisance. Printing and delivery have financial costs associated, and many flyers will immediately be thrown away.</p>

Local and community media (including newspapers, newsletters, and broadcast media)

Local newspapers/newsletters and community radio can be highly effective ways of stimulating conversation and can give your project or idea an air of 'legitimacy'.

Although most useful as a way of disseminating information, it is possible to create dialogue through talk-shows or letters pages.

The type and reach of local and community media vary hugely.

Some (more often rural) communities have well-read newsletters that will allow you to reach a high proportion of residents. Some (more often urban)

communities have community-run radio stations that play a vital role in local democracy and consensus forming.

If you are to benefit from coverage in local and community media, you really need to get an understanding of the dynamics of the area.

Best used for: Stimulating conversation and giving your project an air of 'legitimacy'.

Advantages	Challenges
<p>You can often reach a lot of people in a very human way – it is worth bringing in the voice of a beneficiary or member of the community whenever possible.</p> <p>Media coverage can provide your project or idea with a sense of authority or legitimacy that will encourage future engagement.</p>	<p>The type and reach of local and community media available to you differs hugely from place to place.</p> <p>This is not the best way of delving deeply into an issue, problem solving or consensus building.</p> <p>You are unlikely to reach all parts of your local community through this coverage.</p>

Interviews and surveys

A great deal of feedback gathering from individuals is now carried out online using tools such as [Survey Monkey](#).

However, paper surveys and interviews will often provide more in-depth, nuanced answers. For example, people may be able to ask the interviewer for clarifications. Moreover, if a person's answers would benefit from further explanation, it is far easier to probe with follow up questions when face-to-face.



This method also enables you to reach digitally excluded parts of your community.

Best used for: Gathering nuanced perspectives from (particularly digitally excluded) individuals.

Advantages	Challenges
<p>In-person interviews and surveys often provide more nuanced perspectives than their online equivalent.</p> <p>They enable you to engage digitally excluded people.</p>	<p>Can be very time consuming and resource heavy.</p> <p>Hard to gauge broad public opinion without a very large sample of your community being surveyed/interviewed.</p> <p>Ineffective way of consensus building.</p>

Telephones and call-arounds

One engagement tool that people can forget is the humble telephone. Phone calls often feel more personal than written communications (on or offline). They can therefore be excellent for qualitative research or simply for making people feel valued. This is exactly why they remain so important in political campaigning.

Best used for: Qualitative research and making people feel valued.

Advantages	Challenges
<p>People frequently interact more freely on the phone than through written communication. This can be great for capturing opinions, including for qualitative research.</p> <p>It is a good way of reaching older people, many of whom have landlines.</p> <p>Phone calls can make people feel valued.</p>	<p>Fewer people have landlines than in the past. Younger people can be particularly difficult to contact this way.</p> <p>Cold calling is highly controversial – make sure your call is relevant and specific.</p>

New and innovative in-person engagement techniques

It is important that we don't paint digital as the future and in-person engagement as the past – or purely a way of engaging people with accessibility issues or certain disadvantages.

As aforementioned, the key to successful community engagement is to build your strategy around the specific needs, demographics, geography etc. of your community.

These factors should not only help you choose which techniques to use but should also help you find creative ways to build upon, and tailor these techniques to match the unique needs of your community.

Some innovative in person techniques could include:

- Decorating rooms or creating pop-ups that specifically speak to themes related to your community – perhaps an anniversary or a celebration of a local event, landmark or historical figure
- Working with local media personalities or celebrities
- Producing literature translated into key languages and time events around cultural celebrations relevant to your community

East Street Arts (Page 10) are a great example of innovation being driven by community need.

Conclusion

In this chapter we have looked at some of the traditional and offline methods you can use to engage your community in your project or idea.

This is by no means an exhaustive list. For example, there may be opportunities to speak at local events, some communities may have working citizen assemblies you can approach, others may have opportunities that are entirely unique to their locale.

It is also worth mentioning that there are some methods that you can incorporate into any number of the in-person events discussed.

For example,

- 3D models are a great way of helping people to visualize the transformation of a space.
- Including child friendly activities can give parents the space and time to participate in a consultation.
- Portable voting boxes or sticker boards give people the chance to provide opinions in a quick and easy way.

The key thing, as always, is to choose the engagement methods that best fit the character and needs of your local community.

Recap on traditional tools and techniques

Tool or technique	Most useful for...
Public meeting	Engaging large groups and gauging broad public opinion.
Focus groups and workshops	Gathering in-depth understandings, reaching marginalized groups and problem solving.
Stalls and pop-up installations	Sparking conversation, information dissemination and light-touch opinion gathering.
Open days	Making your project tangible to your community and inspiring them to get involved.
Transect walks	Gaining an in depth understanding of an area and community needs.
Posters and community noticeboards	Informing people of your work in a simple, cost-effective way.
Flyers	Disseminating information quickly.
Local and community media	Stimulating conversation and giving your project an air of 'legitimacy'.
Interviews and surveys	Gathering nuanced perspectives from (particularly digitally excluded) individuals.
Telephones and call-arounds	Qualitative research and making people feel valued.

Case study: Caterham, Chaldon and Whyteleafe Neighbourhood Plan

The challenge of engaging rural and urban communities.

Caterham, Chaldon and Whyteleafe Neighbourhood Plan Steering group are based in an area of Surrey with a mixture of urban and rural characteristics. They realised early on that, for their community engagement to be a success, they would need to be inclusive and sensitive to the needs of both of these communities.

As Chris Windbridge, a member of the steering group explained: “One of the issues was that people in the rural areas were particularly hard to reach due to population sparsity, whereas in the more urban areas we could set up stalls and banners in populated areas.”

“There were also interest differences between rural and urban areas. We needed to be careful to balance these. People in Green Belt or rural areas, were often focused on environmental concerns and protecting their area from development, while those living in more built-up areas tended to focus on issues such as bus-stops, public transport, retail, cafes etc.”

To ensure they reached and understood the needs of both communities, the steering group used a wide range of engagement tools and techniques. These included carrying out surveys, briefings, meetings, regularly updating their Facebook group and website, producing blogs and e-newsletters, and setting up pop-up stalls and stands.

Chris explained, “We knew we had to find places that were used by people from across the community – setting stalls up outside of supermarkets, engaging people through the secondary school that serves the whole area. We also did a household literature drop across the whole area. The leaflet explained what a Neighbourhood plan was and asked for completion of a survey”.

One of the group’s most successful community engagement activities was this survey. The survey was conducted both online (using Survey Monkey) and offline (via an insert into a local newspaper). The insert contained an A5 version of the Neighbourhood plan questionnaire that could be returned by post or completed online. This survey was aimed at capturing the views of the local community on key issues ranging from housing to education, healthcare to business. The data from the offline surveys was manually uploaded to Survey Monkey, enabling the steering committee to analyse all of the feedback together. This survey received 1,300 responses, giving them robust data for the plan.

The survey also included a call for volunteers. This was a key part of their wider volunteer recruitment strategy which resulted in 150 local volunteers being recruited.

Once the group had identified the core issues facing the local community, they divided their volunteers up into specialist discussion groups, relevant to their individual knowledge, interest or needs. These groups covered a wide range of issues including: the local economy and business, environment, transport, leisure,

“It was vital that we didn’t miss anybody out. We constantly tried to engage people from start to finish.”

education, health, heritage, and utilities (broadband, water, electric, gas etc.). These consultations took place both on and offline, allowing the groups to maintain their momentum throughout the COVID-19 pandemic.

The group also sent out regular e-newsletters to an audience of over 700 people. These newsletters were intended to update the community on the progress of the plan and keep them engaged in the project. The newsletter continued even after the plan was

passed via a referendum.

Chris believes that the time and effort they put into reaching the various different interest groups in their community, was an important factor in the neighbourhood plan being successful:

“It was vital that we didn’t miss anybody out. We constantly tried to engage people from start to finish. We valued their feedback, listened hard and incorporated what we were told. It wasn’t just about rural and urban difference, we also had to avoid being party political, to cover all shades of local politics and position. When working on a neighbourhood plan you can’t just be a protestor. You need to understand the different interests people have, come up with solutions and find a consensus”.

Chapter 3 - Digital channels, tools, and techniques

Digital forms of communication are now essential to our day-to-day lives – from WhatsApp to Mailchimp to Facebook. Successful community engagement would therefore be near to impossible without using some of these digital channels.

However, there are so many digital communication tools around these days, it can be hard to know where to start. In this chapter we highlight some of the key digital tools and discuss how, when, and where these are best used. We will also discuss some of the challenges and advantages of each – from cost to accessibility.

Useful terms for this chapter

Customisable – able to be modified to fit a specific need.

Functionality – the range of things a tool can do and how effectively it can do them.

Drag and drop – a function that allows a user to select a virtual object and ‘drag’ it to another place.

Analytics – analysis of data and statistics that can be used to help improve your performance and decision making.

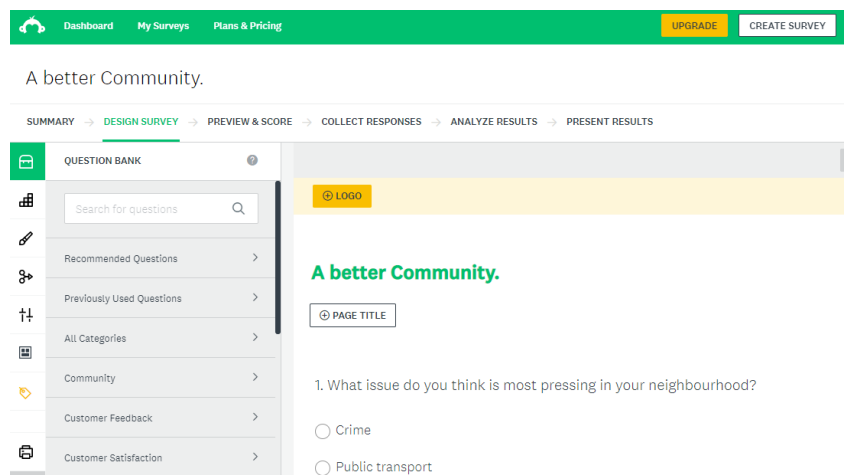
Survey and insight gathering tools

Although there are some advantages to carrying out surveys in person, particularly when looking to engage with digitally excluded groups, online surveys and insight gathering tools are very much the norm now.

Online survey and insight gathering tools give you the ability to design, distribute, collect, store, and analyse data in an intuitive and efficient way. There are many different tools available – some more suitable to academic work, others to market research – some high cost, some low.

SurveyMonkey

SurveyMonkey enables you to build and distribute surveys online. It is very easy to learn and has numerous question types, (from drop-down menus, to open answers to multiple choices. See the appendix to get an idea of functionality) and templates. You can customize your survey with your brand and review, analyse and download your data at any point during the collection process.



Advantages	Disadvantages
<p>Intuitive survey builder that is easy to make fit your brand.</p> <p>There are many question types available from drop-down to open ended questions for qualitative feedback. You can also randomize questions (with the click of a button) to reduce bias.</p> <p>You can analyze your results online and download this data in various formats.</p> <p>You can build in logic so that people get different questions depending on their answers.</p> <p>Free option but has a maximum of 10 questions and 100 respondents. Paid option allows you to better customize your survey and remove SurveyMonkey branding, collaborate with other people, ask more questions, and reach more people.</p>	<p>With online surveys you need to be careful not to build in the wrong logic options because this could mean that for some respondents you miss collecting their responses to questions that you may have wanted their feedback on. You should always trial your survey first and it may be worth designing on paper before building it.</p> <p>On the free version you can only ask 10 questions and get 100 responses for each survey.</p> <p>Response rates can be low without prompting people.</p> <p>As with all surveys, you need to ensure you are compliant with up to date laws around the use of personal information.</p>

Google Forms

Google Forms is another excellent survey tool. Google Forms has a lot of the same functionality as SurveyMonkey's premium options, for free. However, it is not as customisable (for example, it is harder to match with your brand).

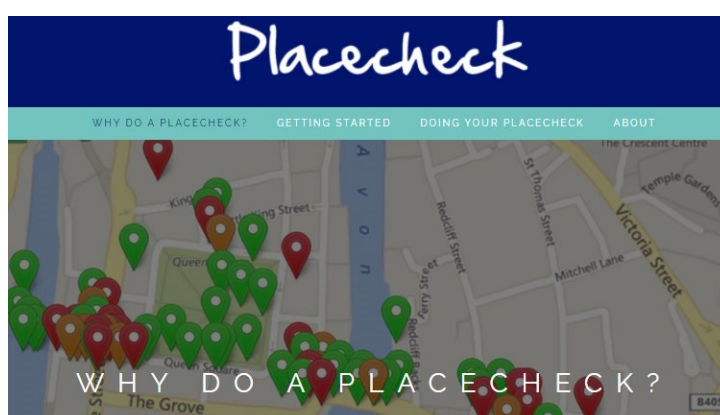
Advantages	Disadvantages
Google Forms is free to anybody with a Google account. You can build as many surveys and reach as many people as you choose.	Customisation options are limited for branded surveys.

Placecheck

A Placecheck is a methodology designed to help you gather the information about a place (a street, park, neighbourhood or town centre) that you need to think about to make a place better.

A Placecheck usually involves one or more 'walkabouts' in your area of interest, in which you build a digital map (using the Placecheck web app) and populate it with the input of local people and key community stakeholders.

In many ways the Placecheck methodology may be seen as a digitally enhanced transect walk.



Advantages	Disadvantages
<p>Useful for taking the first steps in collecting knowledge and assessing what would improve an area. It has all the advantages of a transect walks with added digital collection and storage benefits.</p> <p>The app is free to community organisations and schools - with different prices for larger voluntary organisations, local authorities and private sector organisations.</p>	<p>Walks are likely to attract a specific demographic (and exclude others for accessibility reasons).</p> <p>In situ activities always have health and safety issues to consider.</p>

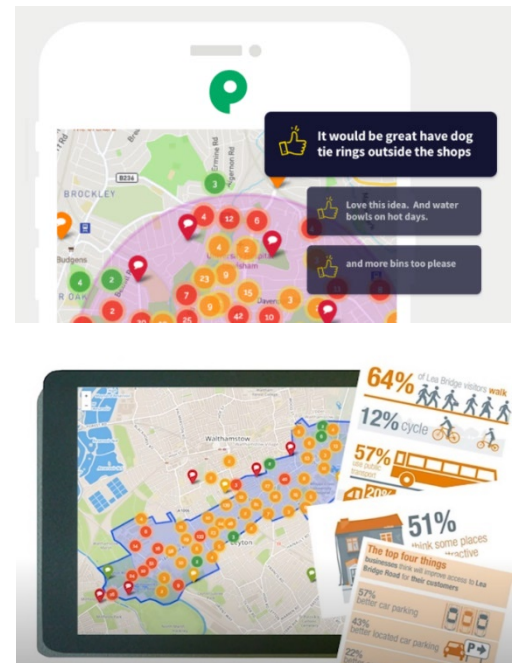
Commonplace

Commonplace is an engagement insight platform used widely by local authorities, developers, and community groups. It can be used for a range of purposes including planning consultations, community engagement and transport planning.

Commonplace enables local people to express their needs and opinions about a place through the Commonplace app or social media. Comments are added to a heatmap of an area – with colours representing peoples’ feelings. It is easy for people to add comments and interact with others.

All insights are available in real time via an online dashboard. You can interrogate data by theme, demographic, or place, download reports and create infographics.

These insights can serve any number of purposes – from communicating local trends, to informing designs. For example, Commonplace is often used to publish early stage plans and get feedback as a project progresses.



Advantages	Disadvantages
<p>Suitable for a wide range of community engagement projects.</p> <p>Visually engaging but easy to understand – making it very user friendly.</p> <p>Insights are easy to collect, store, analyse, download and present.</p>	<p>Commonplace is aimed at larger organisations and may therefore be an expensive option for smaller community groups (pricing is dependent on requirements).</p> <p>Should be used alongside traditional tools to ensure the views of digitally excluded communities are captured.</p>

Email and newsletters

Digital communication trends and channels have a habit of appearing, evolving, and dissolving. However, email has consistently remained one of the most reliable and effective forms of communication.

Although you can send emails to large groups of people directly from your email provider (Gmail, Yahoo etc.), there are now numerous tools available that allow you to create visually engaging emails or newsletters, build and manage mailing lists, schedule emails, and give you useful insights into your audience such as their age range, gender and location.

Data protection and emails

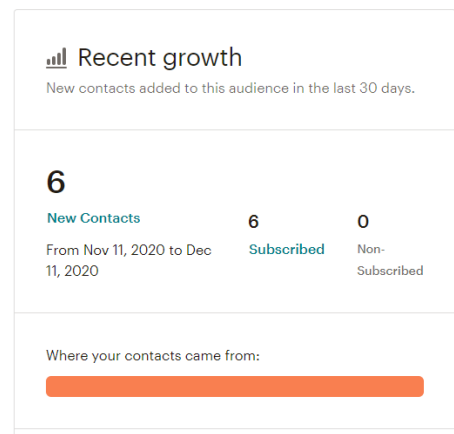
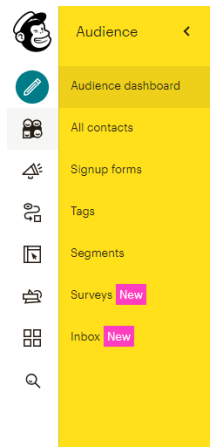
Please see the Government's full guide to [GDPR](#)

For example, to avoid legal issues or fines, whenever you are sending an email, you need to be acutely aware of data protection laws.

For standard emails, make sure you use the Blind carbon copy (Bcc) section for anyone who has not given you permission to share their details. Failure to do this will mean that the name and email address of recipients will be shared with other recipients without their prior consent - a breach of GDPR regulations.

Mailchimp

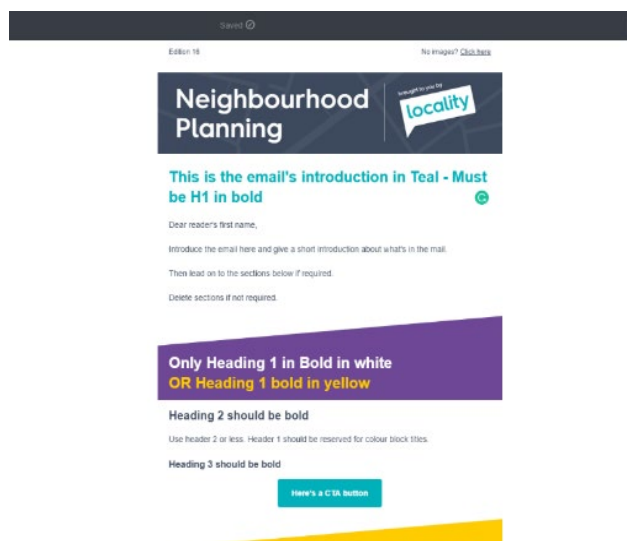
[Mailchimp](#) is the most widely used, industry standard email marketing software. It is highly intuitive (so quick and easy to get started) but has a range of more advanced features. Its analytics section also makes it easy to track who has been opening your emails and where, and helps you improve your email performance.



Advantages	Disadvantages
<p>Mailchimp is free if you have under 2,000 contacts.</p> <p>Its drag and drop functionality makes it easy to use.</p> <p>You can store images and files for multiple use.</p> <p>It has a vast range of features for many types of design and levels of need.</p> <p>It provides you with important analytics on open rates, audience etc.</p>	<p>If you have a larger audience, it can become expensive.</p> <p>Although Mailchimp doesn't provide phone support, their online support is good.</p>

Constant Contact and Campaign Monitor are good alternatives to Mailchimp.

They have much of the same functionality but vary in price and customisation options.



Websites

Having a website will provide people in your community and other stakeholders a place to find information about your services, idea, or project, at any time. You can often integrate social media channels, survey tools, newsletters, and e-commerce into your website - all of which can increase and improve engagement.

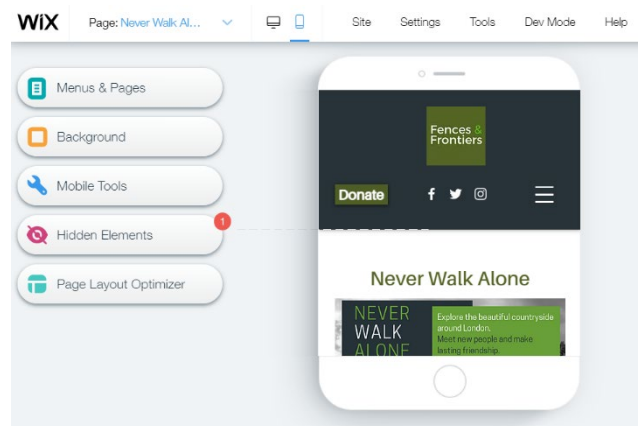
It is no longer necessary to employ a web developer or be a coding wiz to build a professional, attractive website. The emergence of online platforms such as Wix and Squarespace has made building and designing websites easier than ever.

Both of these platforms use a highly intuitive drag and drop approach and have a lot of add on options meaning you can link your site to your social media channels etc.

Although some groups may require more advanced functionality, these platforms provide everything that most small to medium organisations need in a website.

Wix

Wix is a website building platform, that lets you create and edit websites without any coding knowledge. It is very clean and easy to understand – making it perfect for beginners. You’ll be able to put together a professional website in no time.



Advantages	Disadvantages
<p>Very easy to understand, build and edit, making it beginner friendly.</p> <p>Wix has a great range of templates – meaning you can create professional websites in no time.</p> <p>You can easily switch between the desktop and phone versions of your site.</p> <p>There is a free plan and paid for plans are affordable.</p> <p>Easy to upload, edit and publish videos and images.</p> <p>It has free marketing features that can be used as an alternative to programmes such as Mailchimp.</p>	<p>Wix has a limited number of typefaces (fonts) – so you may have to upload your own to stay on brand.</p>

Squarespace is another well-known website building platform. It is often praised for its image editing, ecommerce, file storage space and Search Engine Optimisation (SEO).

Weebly is worth looking into for more advanced functionality. If your main reason for having a website is blogging, then WordPress is also a good option.

Video conferencing

There are multiple tools available for video conferencing and collaboration. These tools have become a daily part of many of our lives, particularly since COVID-19 changed our work patterns and practices.

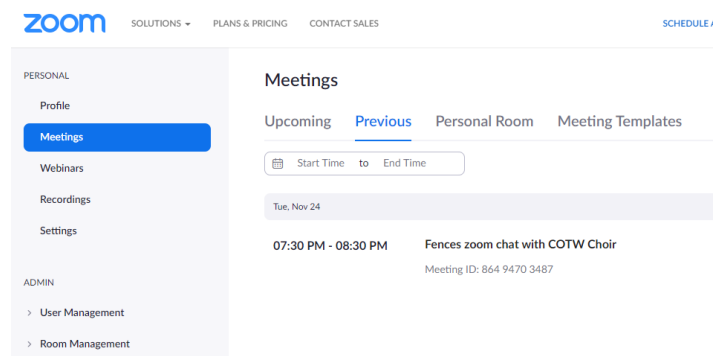
So long as you have a computer with a webcam or a tablet or smartphone with internet connection, it is easier than ever to meet and collaborate virtually.

These tools can be used to host and facilitate any number of activities from AGMs to focus groups. Many also have added functionality including the ability to record meetings, share your screen for presentations or group working, audience polls and have smaller 'breakout' rooms within a large meeting.

Once you get used to it, video conferencing is a far more engaging, productive, and human form of communication than email - and can be hugely beneficial when meetings cannot happen in person.

Zoom

Zoom is the most widely used video conferencing tool. To set up and host meetings you need to subscribe. The free account covers most basic video conferencing needs. There are also paid for options for more advanced functionality needs.



People you invite to attend your meetings do not need to subscribe; they simply need to join using the Zoom link that is created when you set up a new meeting.

Advantages	Disadvantages
<p>Zoom can be used for one to one meetings, group meetings and meetings with people outside of your group.</p> <p>It's easy to sign up and use, taking less than 10 minutes to get started. Subsequent meetings are even quicker and easier to set up.</p> <p>The call quality is reliable and predictable.</p> <p>It has a vast range of advanced features, many of which are available on the free version. These include screen sharing, breakout rooms, scheduling calls, recording sessions and many more.</p> <p>Zoom is relatively inexpensive. The basic license gives you one to one and group meetings free of charge, while paid for options are affordable.</p> <p>Users have the option to call in by phone.</p>	<p>On the free license, meetings are limited to 40 minutes. With a Zoom Pro, Business or Education license, you can host unlimited group meetings with up to 100 people and can collaborate for as long as you need.</p> <p>There have been questions around privacy (as anyone with a link can enter a session). Zoom have included waiting room and passwords to help resolve this.</p>

Google Meet

Google Meet (previously named Google Hangouts) is Google's video conferencing software. It has fewer functions than Zoom overall but still has many of the most used functions such as various views, recording functionality, screen share options etc. Moreover, its simplicity may be an advantage to some, making it easier to learn.

Advantages	Disadvantages
Free users can call for up to 60 minutes – which is longer than Zoom's 40 minutes. Google transcription software is incorporated in Meet. Participants can enable captions which is great for accessibility and inclusion. Meet has more screen sharing options than most video conferencing software solutions.	The free version's limit of 100 participants and 60-minute calls may be too restrictive for some organisations. Meetings set up by free users can only be attended by people with a Google account. Meetings set up by free users don't include a phone number, so people without internet access can't dial in.

Skype

Skype has been around for a long time as a tool for free voice and video calls. It can also be used for video conferencing for free and anyone can attend via a shared link, whether they have Skype downloaded or not.

Although it has much of the same functionality as Zoom, it is best used for smaller groups.

Advantages	Disadvantages
As Skype has been around for some time, many people already understand how it works.	The consumer version of Skype limits you to 50 participants. You will need to pay for Skype for Business if you're running a larger organisation or want to set up meetings for more than 50 people.

Other video conferencing options you may consider are GoToMeeting and Microsoft Teams. Both tools have benefits but can be expensive for smaller organisations. GoToMeeting is more of a meeting tool than a real-time collaboration tool, even though you do have the option to share documents with

others in real-time. Microsoft Teams is typically used in medium to large businesses (with IT support available) for messaging, collaboration, and video conferencing.

Top tips for hosting engaging digital events:

- **Preparation is key** - Make sure your devices are fully charged and try to keep your software updated to the latest version.
- **Content development** - Like any meeting, your objectives, content, and the structure of the meeting should be prepared in advance. Make sure you've communicated any requirements to speakers and attendees.
- **Comfort and brain breaks** - It can be tiring sitting in front of a screen for too long. Plan in comfort breaks and mix up the activities to give your audience a rest.
- **Be seen and heard** - If you are presenting, make sure you can be clearly seen and heard. Test your headset, check your lighting and the positioning of your camera in advance.
- **Clear any distractions** - When hosting or attending a meeting, we recommend putting your phone on silent and removing any other distractions that might be seen or heard.
- **Start with a warm welcome** - Make sure everyone has the chance to introduce themselves. Think about including an icebreaker at the start of the session.
- **Mix it up** - Use other digital tools like [Jamboard](#) (an interactive whiteboard) and [Mentimeter](#) (online presentation software) to get your participants interacting. Breakout rooms can encourage more in-depth discussion and give less confident people the chance to speak.
- **Keep an eye on the clock** - It is critical to start and finish your session on time, especially if the platform you are using has a time limit.
- **Follow up** - Make sure all queries and actions that come out of the meeting are followed up on.
- **You'll be fine!** - Hosting digital events can be nerve-racking at first but you'll soon pick it up. Remember, we all have technical difficulties at times - so don't worry!

Social media channels

Social media plays a huge role in our lives. Indeed, for many people, social media channels such as Facebook, Twitter, Instagram, and WhatsApp are their primary news source and communication tool.

Although most groups recognise the importance of including social media in their community engagement strategy, knowing where to start and how to make the most of each channel can be challenging, and take time.

Here we will explore some of the more widely used social media channels and give you a few tips for getting started and avoiding pitfalls.

Nextdoor

Before we delve into some of the more widely known social media channels, we are going to start with [Nextdoor](#). Nextdoor exists specifically to help foster better community connections and is a valuable forum for local news and recommendations. It's ideal for local businesses and sharing hyper-local updates.

Advantages	Disadvantages
<p>Nextdoor is a hyper-local platform - groups are restricted to proven residents. This means most updates should be useful and relevant to the community.</p> <p>The network is private and secure. People must post under their real names and verify themselves.</p> <p>People turn to Nextdoor to help them connect with neighbours during tough times - usage increased by 80 per cent at the peak of COVID-19.</p> <p>Local businesses can set up profiles to tell locals about their goods and services.</p>	<p>Some business communications are only available to those who purchase paid ads.</p>

Top tips for use

If you are a local business or community organisation, set up a profile and encourage community members to use the recommendation feature. [76% of members](#) have been influenced by a recommendation they saw on Nextdoor.

Use the poll feature to survey residents and find out what they like about their neighbourhoods and what they would like to improve.

WhatsApp

WhatsApp is one of the most popular messaging apps. WhatsApp allows you to send and receive voice and video calls and messages using only an internet connection (your phone data or Wi-Fi).

It is a great way of keeping your community aware of events, updates, new projects etc.

Please be aware of GDPR / data protection laws. Get permission before you add people to groups because they can see other people's phone numbers.

Advantages	Disadvantages
<p>WhatsApp allows you to communicate with your audience directly. Most people use WhatsApp to chat with friends, so see it as a more personal communication channel.</p> <p>Your messages are likely to appear on users' phones as a notification rather than relying on them scrolling past by chance on a newsfeed.</p> <p>You can create groups for specific projects or topics (but must ensure you have permission from group members to share their contact information with others).</p> <p>You can easily send pictures or videos to members of your community.</p> <p>You can create 'broadcast lists': saved lists of message recipients that you can repeatedly send broadcast messages to without having to select them each time.</p>	<p>You must have people's phone numbers in order to engage with them.</p> <p>As it is an instant messaging service, people expect a quick response.</p> <p>As anyone could respond to messages at any time, group chats could be more difficult to moderate than other forms of social media.</p>

Top tips for use

Only share updates that are extremely relevant to your community; avoid bombarding them with too many notifications.

Take advantage of the ability to send pictures and videos.

Save time using broadcast lists (see above).

With permission, consider creating a WhatsApp group for certain demographic group (such as residents of a housing block) to allow them to communicate in a more interactive, organic way.

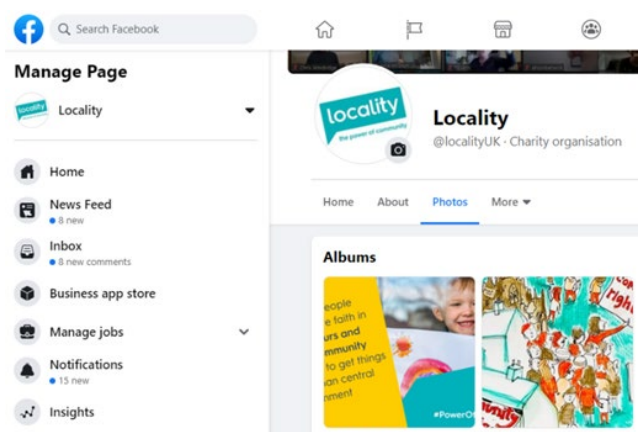
Remember that you will still need to moderate group chats to ensure shared content is appropriate.

Facebook

Facebook is the most popular social network in the UK and has over 2 billion users worldwide.

Users can post comments, share photographs, and post links to news or other content, and live chat.

You can start or join groups and create pages for your organisation.



Advantages	Disadvantages
<p>Facebook is a frequently used platform – <u>74% of active US users</u> log on at least once a day.</p> <p>Facebook’s ‘reactions’ feature means that emotional stories tend to get traction.</p> <p>Facebook’s popularity means you are likely to be able to reach the widest segment of your audience using this platform.</p> <p>You can create private, moderated Facebook groups for local communities.</p>	<p>Facebook prioritises pages that post quality content on a regular schedule, which can be time-consuming to maintain.</p> <p>Younger users are now turning away from Facebook towards other platforms such as Instagram and TikTok.</p>

Top tips for use

Keep up to date on the Facebook algorithm (how it decides which posts to give prominence to) and think about what content it favours. In 2020, the algorithm

favours posts that start conversations, and high-quality video content longer than three minutes.

Create a content calendar for the year and schedule posts when you are less busy to help you manage your time and update consistently.

Use the poll function to survey your followers and find what their priorities are.

If it works for your page, share quick updates or behind-the-scenes content using Facebook Stories.

To create a more collaborative platform, set up a Facebook Group for your organisation or community. This is a more discussion-based platform which allows members to contribute more directly. For this reason, Facebook Groups tend to require more moderation than Facebook Pages.

Remember that you are subject to the whims of the Facebook algorithm and business model. Make sure you are never in a position where it is the only way to communicate with your audience.

Twitter

Twitter is a microblogging social media service, with posts limited to 280 characters or less. It's the perfect platform for live blogging events such as conferences, open days or webinars.



Advantages	Disadvantages
<p>Lots of MPs, councillors and other figures with political power use Twitter as their primary social media channel. It's a great platform for lobbying and sharing your impact.</p> <p>Hashtags allow you to keep abreast of trends and join in on relevant conversations.</p> <p>The platform encourages users to share others' content by retweeting and quote tweeting. It's more conversation-based than many other platforms.</p>	<p>The platform is fast-moving by nature. If you post at an unpopular time your post is likely to disappear without anyone seeing it.</p> <p>Due to its more anonymous nature, discourse on Twitter can sometimes be less constructive</p>

Top tips for use

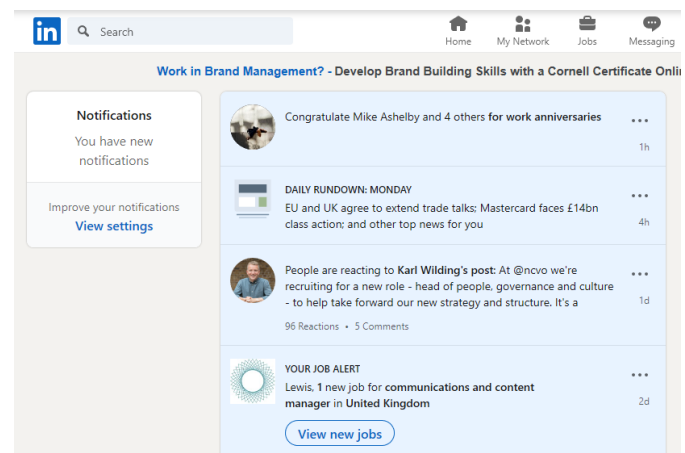
Consider direct messaging people and organisations who you are interested in collaborating with and ask them to share your tweets – or involve them directly by tagging them in the conversation.

Create a new hashtag for your brand or events so all the discussion can be found in one place.

Stay aware of trending topics and articles so you can get involved in conversations relevant to you.

LinkedIn

LinkedIn is a social media network for professionals. It's ideal for sharing updates about your progress and impact and networking with others in your field.



Advantages	Disadvantages
<p>Tends to be a more thoughtful, discussion-based community than some other platforms.</p> <p>A great place to post blogs and longer form content.</p> <p>Can be a useful recruitment tool.</p>	<p>Can be more geared towards the private sphere with an emphasis on corporate strategy.</p> <p>The platform tends to be focused on recruitment and moving up the career ladder.</p>

Top tips for use

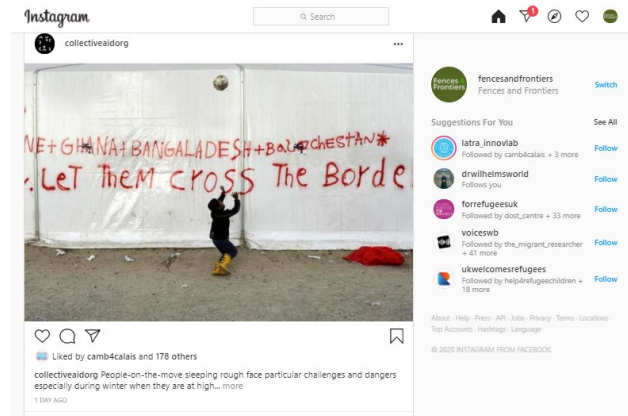
Tag other organisations you work with in your posts.

Experiment with sharing more discursive, longer form content.

Join groups on topics related to your organisation.

Instagram

Instagram is an image-based social platform. 75% of 18–24-year olds use Instagram so it's ideal for reaching younger people.



Advantages	Disadvantages
<p>Instagram is a good way to reach younger people who are less likely to use traditional media or older social media platforms such as Facebook.</p> <p>Instagram Stories are extremely popular and allow you to share quick bursts of content and include interactive elements such as polls and quizzes.</p> <p>The Explore feature means your post may be discovered thanks to tagging by subject or geographic location.</p>	<p>As Instagram is such an image-based platform, you will need to have aesthetically pleasing content in order to attract a following.</p> <p>As with Facebook, the algorithm changes frequently so you may find that your engagement can change suddenly.</p>

Top tips for use

Think carefully about whether Instagram is the right platform for you. If you're not looking to target a younger userbase and don't have many images, your time might be better invested elsewhere.

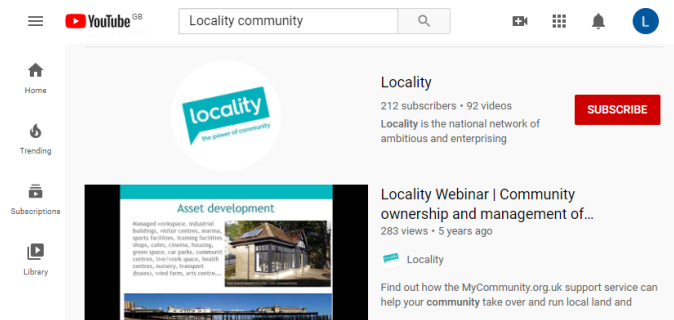
Make sure you use relevant hashtags to help your community discover your posts.

Create aesthetically pleasing content – if you don't have access to good photography, think about creating graphics using a design programme such as Canva or Photoshop.

Post frequently on Instagram Stories – users look at these just as much as their main Instagram feed.

YouTube

[YouTube](#) began life as a video-posting site but has now become an active community. It's ideal for hosting longer videos or series and keeping your content in one place.



Advantages	Disadvantages
<p>YouTube is a free video hosting site. Videos can usually be embedded into existing websites.</p>	<p>It can be expensive and time-consuming to create high-quality video content.</p> <p>Many people use YouTube as a TV alternative - a way to relax or switch off. More factual and educational videos could get ignored in favour of shorter or less demanding content.</p>

Top tips for use

Create eye catching thumbnails (i.e. preview images that viewers will see before clicking into your content) to entice your audience to click on your videos.

Tag and describe your content as accurately as possible so that your videos can be discovered.

Embed your videos in your website and include them in your newsletter.

Other social networks

The social media landscape is always changing, and it can be hard to keep up. Other social networks include [Snapchat](#) (with a focus on short-lived, automatically disappearing content), [TikTok](#) (a platform for videos under 60 seconds), and [Reddit](#) (a news aggregation and discussion website). If you are planning to target younger people, it can be interesting to experiment with these platforms, but you will need to ensure that the impact on your time is worthwhile.

Graphic design

They say a picture speaks a thousand words. This is exactly why, whatever channels you use, you should always be thinking about how visually engaging your communications are.

Luckily, there are now many high-quality graphic design tools available online. With these tools you can make social media graphics, logos, infographics, posters, adverts and much more.

The designs you create will allow you to add life and energy to your newsletters or social media posts. You may even wish to print your designs and use them as part of your in-person community engagement activities.

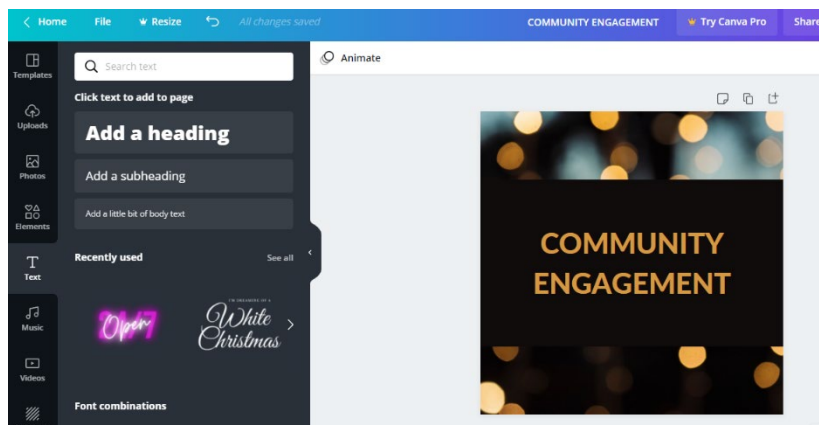
Adobe Creative Cloud

The [Adobe Creative Cloud](#) is used widely by professional graphic designers. The Adobe software suite (including Illustrator, Photoshop, InDesign and more) covers all possible design needs - from photo editing to video creation.

Advantages	Disadvantages
<p>Adobe provide an incredible range of design tools that enable you to create beautiful, professional, custom designs.</p> <p>Adobe gives you 100 per cent control over every aspect of your designs.</p>	<p>Adobe software has a sharp learning curve. It takes time to learn so is not suitable for people without design experience or looking for basic, quick designs.</p> <p>Adobe products can be expensive for many people and small organisations.</p>

Canva

[Canva](#) is a simple, intuitive, template based graphic design tool. It enables you to create eye-catching designs for all sorts of content - from presentations to social media posts. It is a great starting point for those without much design experience, or who are short on time.



Advantages	Disadvantages
<p>Intuitive with easy to use templates so is perfect for people without design experience or wanting to create quick, basic designs.</p> <p>It has a library of free images and graphics you can incorporate into your projects.</p> <p>It has a free version with most key features, as well as affordable subscriptions.</p>	<p>Although it has all the basic design tools, you do not have granular control over your designs.</p> <p>When working from templates you risk creating designs that are very similar to other organisations.</p>

[GIMP](#) is a free design software and provides much of the same functionality as the Adobe photoshop but also has a steep learning curve.

[Piktochart](#) is an easy to use way of creating infographics and presentations.

Image libraries

Whether you're designing a poster or building a website, you often need a set of images that illustrate the type of work you do, or your objectives. You may have some images you can use from your community or past projects. However, you always need to be sure you have permission from those in the photos.

Sometimes the best and easiest approach is to use stock images. There are a range of online photo libraries available. Some of these cover a wide range of topics, some specialist, some free and some very expensive.

Two of the most well used image libraries are Shutterstock and Pexels.

Shutterstock

[Shutterstock](#) is the most well-known paid stock photo site.

Advantages	Disadvantages
<p>There are millions of images and designs available so you can find an image specific to your design needs.</p> <p>You can purchase individual images or set up a subscription.</p>	<p>The costs of images can be high for many organisations.</p>

Pexels

Pexels is the most commonly used free online image library.

Advantages	Disadvantages
All images are royalty free and have no cost - even for commercial projects.	There is a limited selection of images. This means you may not find an image that suits your needs and that some images are widely used (and frequently used as memes).

Conclusion

As shown in this chapter, there are a huge range of digital tools that you can use to support and enhance your community engagement.

These tools can help you reach new audiences, provide project updates, retain supporters, capture people's needs and opinions, collect and analyse data, and much more.

We have given an overview of some of the most widely used digital tools and techniques for community engagement. However, this list is by no means exhaustive and we encourage you to do your own research. You may find opportunities or software that specifically address your geographic and demographic needs.

Successfully engaging your community without the use of any digital tools, would be incredibly hard. However, it is also important to remember that there are still significant advantages to face to face engagement. Traditional and digital tools should be seen as complementary to one another rather than as alternatives.

Recap on digital channels, tools, and techniques

Tool or technique	Most useful for...
Surveys and insight gathering tools	Distributing surveys and collecting, storing, and analysing data in an intuitive and efficient way.
Websites	Providing people with a fixed place to find information about your services, idea, or project, at any time.
Video conferencing	Conducting live video-based meetings.
Social media channels	Creating and sharing content online and participating in social networking.
Graphic design	Making your communications visually engaging.
Image libraries	Finding images that illustrate your project or idea.

Case Study: Joint Melksham Neighbourhood Plan

Mix your methods of engagement for the best results.

The key to successful community engagement is often to use multiple engagement methods, each designed to capture the thoughts and interests of different demographics.

The Joint Melksham Neighbourhood Plan steering group did exactly this, achieving amazing results. As Richard Wood, Chair of the group explained:

“Digital channels were of course important, but it was also important to reach people through other channels such as posters and direct mailing, as well as having a phone line for people to call and ask questions.”

“Digital channels were of course important, but it was also important to reach people through other channels such as posters and direct mailing, as well as having a phone line for people to call and ask questions.

“We produced “talking heads” videos which helped us engage broadly. The videos were short, topic based, and explained different aspects of the plan and the process. A variety of local people, from young people, to business representatives and local interest group members agreed to speak on the videos. Nearly 800 people watched the videos from a [link on the website](#), over 26,000 people reached by Facebook with nearly 14,000 videos watched from that link. This

is exactly the sort of access that the Steering Group wanted to achieve, to reach out and engage with members of the public that may not normally be interested in planning policies.

“For those not online, members of the public could ring either the Town or Parish Council and ask for a hard copy to be posted to them, and the consultation was initially advertised by a leaflet delivered to every dwelling (business and domestic) in the Plan area.

“Towards the end of the consultation period, as the lockdown loosened, a member of the team also spent some time in the town market square to enable people to have a chance to ask questions in a socially distanced, but face to face way.”

Nearly 100 different people, organisations and statutory consultees submitted comments, with almost 300 individual comments against different policies and evidence documents. In addition, there were over 3,000 visits to the Melksham Neighbourhood Plan website, from over 2,100 different people during the 8-week consultation period.

“We think the range of approaches worked well to make sure everyone knew about the consultation, how to respond, and how it relates to them as people who live and work in the area. The videos in particular were a great way to make the plan accessible and to spark the interest of a wide range of people”.

Case Study: Lawrence Weston, Bristol

Lawrence Weston is a post-war housing estate in North West Bristol with a population of around 7,000. In recent years the area has lost many of its essential local services and is poorly served by public transport.

Driven by these issues, local community group, Ambition Lawrence Weston, took on the neighbourhood plan. Aware of the need to represent the whole community, they used multiple methods of engagement.

They started by conducting a survey. This survey took a holistic approach to the community's needs - covering housing, planning, facilities, jobs, crime, young people, and families. Over 1,000 people were surveyed door-to-door by local people who had been specifically trained in community research.

This was followed up with information gathering and data sharing through regular meetings, drop-ins and social media.

All of these findings then fed into a further round of door-to-door surveys, undertaken in the six-week consultation process. At the same time, an animated film was made to help explain the aims and ambitions of the neighbourhood development plan and how it could transform the area.

Chapter 4 – Neighbourhood planning

In this chapter we take a closer look at tools, techniques and tips that may be particularly useful for neighbourhood planning groups. This chapter is intended as an addition to the earlier chapters of this toolkit, not as an alternative set of tools.

The main purpose of a Neighborhood Plan is to give power to communities to shape the development and growth of their area. Therefore, without meaningful community engagement, neighborhood planning is meaningless.

Neighbourhood plans are usually led and coordinated by a neighbourhood forum, parish or town council, or steering group.

One of the key roles of this coordinating group is to ensure that the plan accurately represents the needs, interests and views of the whole community.

Community consultation and engagement is a statutory requirement of the neighbourhood planning process. When a plan is submitted for independent examination, you will be expected to provide a statement of community consultation. This will need to demonstrate that the legal requirements have been met.

At the end of a neighbourhood planning process a Yes-No referendum will be held on the plan. Only through committed community engagement and robust evidence collection, will your community have the understanding and ownership of the plan necessary to make this vote truly meaningful.

It is also important to remember that the plan is just the beginning. By giving people a sense of ownership over the plan from the very start, you will have far more people ready to support you when it comes to delivering the plan.

This chapter is divided into two parts:

- 1) The community engagement process: We discuss some of the key steps of the neighbourhood planning process and which types of engagement may be most suitable for when.



- 2) Making your plan digitally accessible: We then look at how you can ensure your neighbourhood plan is digitally accessible for all users.

Part 1: The community engagement process

The community engagement process officially starts when you publicise the proposal to produce a neighbourhood plan. However, ideally you should start talking to people informally beforehand, to get a sense of who might be interested in forming a group, or contributing to the process directly, as well as getting a general sense of whether the community is interested in creating a plan.

Step-by-step

These are the key steps you will need to follow in carrying out community engagement in your neighbourhood plan:

- 1) Publicise the proposal to produce a neighbourhood plan.
- 2) Identify key local partners and stakeholders and develop working arrangements to gain their involvement and support.
- 3) Formulate a programme of community engagement.
- 4) Carry out initial community engagement and analysis to identify issues and themes.
- 5) Undertake on-going community engagement to support the development of policy and content of the plan.
- 6) Provide feedback at all stages.
- 7) Consult on the draft plan.

Identifying local partners and stakeholders

It is important to identify the partners and stakeholders who you want to contribute to your plan at the earliest stage possible.

Stakeholder groups will differ hugely from community to community. The important thing is that you identify the people and groups who will be affected by your plan and influence its success. These people will range from councillors to landowners to representatives of hard-to-reach and minority communities.

Your local planning authority should be able to help in compiling the list and providing contact details. If you are in a parish then the parish council should also have a directory of local groups.

Stakeholders may include:

- Elected local councillors
- Local shopkeepers, businesses, major employers, and business organisations, including chambers of trade or commerce
- Community groups such as residents' associations, local civic or amenity societies, wildlife trusts, local history groups or sports clubs
- Landowners of key sites or organisations with significant property holdings and developers who have the legal agreement to buy a specific site if it gets planning permission (for example)
- Local trusts and project groups, such as community development trusts, land trusts or building preservation trusts
- Not-for-profit organisations representing minority and excluded groups e.g. older people, disabled people, young people, low-income, faith groups, LGBTQI+ groups etc.
- Educational establishments such as schools, colleges, and universities
- Community facilitators or activists
- Local institutions e.g. arts centres, performance venues, architecture, or built environment centres
- Health and social care organisations
- Local branches of professional bodies.

In the following sections we include a host of suggested tools and techniques. This is by no means exhaustive and is just to give you an idea of what you could use.

Getting started

People will not get involved in the process if they don't know it is happening – so you need to start by getting the word out!

Remember that most people will not have heard of neighbourhood planning. You need to find ways to make it as easy as possible for people to understand and engage with your plan. Use plain language, avoid planning jargon and make it clear that this process has direct relevance to their lives and the lives of their families.

It is important to be clear and precise about what the plan could achieve and what you want people to contribute to. While you want to enthuse people, you must also manage their expectations about its limits.

Suggested tools and techniques:

- Surveys
- Stalls
- Flyer
- Local press
- Posters
- Placecheck
- Transect walks

The tools and techniques you use for your community engagement must be sensitive to the needs and interests of your community. As discussed in chapter 1, you should always consider the barriers people may face to participation, and how you can overcome these. Chapter 2 and 3 of this toolkit cover a wide range of traditional and digital tools and techniques you can use.

It is important to avoid giving the impression that key decisions are already made. Successful, meaningful community engagement is about giving people true ownership and agency.

At the start of your engagement process, you should think about asking simple questions about your place and community. Questions that get people thinking about how to improve their neighbourhood without the need for specialist knowledge. For example:

- What do/don't you like about where you live?
- Describe where you live in three words.
- What would you change about this place?
- Tell us about something funny/embarrassing/silly/memorable about this place.
- What are you most proud of about this place?
- If you could give an award to someone in your community for making this a better place who would it be and why?
- Are there any places that you avoid around here and why?

As the engagement process progresses, you can then introduce more specific questions about key sites, buildings, green spaces, business and retail, transport etc.

Data gathering and exploration

Once you have identified the broad themes or issues that emerged from your initial community engagement you will then need to find ways to explore these in more detail – and begin to uncover potential solutions. You will also want to consult on the draft vision and aims to make sure you are on the right track.

This stage would usually be the right time start running focus groups and carrying out issue specific workshops.

Suggested tools and techniques

- Focus groups and workshops
- Newsletters
- Website and social media updates
- Open days
- Public meetings
- Surveys

The important thing is that you find ways to maintain the momentum and interest built up from your initial broader consultations.

You should think about ways that you can keep the whole community involved and engaged in this time. For example, producing regular newsletters, sharing your progress on social media and on your website and holding catch-up events can make the process feel more transparent and community led.

The draft plan

When you have gathered your data and written your draft plan, it is a statutory requirement to conduct a pre-submission consultation.

Neighbourhood plans can be quite dense, daunting documents. You should try to make the draft as accessible as possible for your key audiences; breaking it down into digestible parts and using clear language. You should also think about ways that you can make the plan visually engaging and present data in ways that people relate to by using infographics, maps etc.

Suggested tools and techniques:

- Newsletters
- Website and social media updates
- Open days and public meetings
- Graphic design tools

When the draft plan is ready, you should invite people to an event and give them another opportunity to provide their views and feedback. Your local authority will be able to advise on any legal requirements to consult with specific stakeholders and bodies.

Whatever stage you are at in developing your neighbourhood plan, if you are struggling with community engagement, you may want to have a chat with your LPA to see if they can advise you in any way to help you move forward.

Presenting a high-level summary of the neighbourhood plan

Below you will find a template for presenting a high-level summary of your neighbourhood plan.

Publishing high level information about your plan in an accessible place and format, is a great way to help users make sense of your plan and to find the information they are looking for.

Although you will only be able to finalise this towards the end of the process, filling this in (and making it publicly accessible) as you go along can be useful as a way of tracking your progress and showing your transparency.

Before using this template, we recommend you discuss this with your Local Planning Authority (LPA). They may already have a template that they prefer groups to use, or they may prefer to produce such summaries themselves once the neighbourhood plan has been made.

Neighbourhood Plan Name:	
Status (e.g. Made, draft):	
Made date (if applicable):	
Lifetime of plan:	
Are all policies up to date (Y/N)	
If answered no to the above, please note which policies are not up to date (e.g., housing) and the reason why, noting any policies in the LPA wider development framework that have superseded those of the neighbourhood plan (where relevant)	
Update/modification of neighbourhood plan in progress (Y/N) If yes, please note what the update/modification will focus on and which policies will likely be affected	
Target date for completing update:	
Aim of NP:	
Themes: (e.g. housing, design, environment)	
Theme:	Housing
Does the NP include an overall requirement figure for the area (Y/N)?	
If yes to the above, what is the number?	
Does the NP include site allocations (Y/N)?	

If yes to the above, note the number and include a link to the map showing the allocations	
Theme:	E.g. design
How is the neighbourhood plan responding to the theme?	E.g. includes a series of design policies that new development should take into account. Also includes a design code with some specific parameters.
Theme:	
How is the neighbourhood plan responding to the theme?	
Theme:	
How is the neighbourhood plan responding to the theme?	

Case study: Teignmouth Town Council Neighbourhood Plan

A little innovation can go a long way when engaging harder to reach groups

Teignmouth Town Council's Neighbourhood Plan Steering Group were acutely aware that they had only seen adults at their community consultation events and online surveys.

The Steering Group understood the importance of engaging young people – and giving them a meaningful voice in the future of their community. As Joan Atkins, Chair of the Group, explained:

“There is a lot of criticism of our young people but actually if they are made to feel part of their community and feel their needs are sought out and listened to, it might help to change public perception about young people and reduce anti-social behaviour”.

The Steering Group became aware that the local secondary school (Teignmouth Community School) had been using specialist software to set homework and receive completed work during the Covid-19 lockdown. After speaking to the school Principal, they arranged to use this software to consult the students about “what they would like to see in the town in the next 10-20 years”.

Joan continued, “We supplied the poster asking the question and a direct email address for the reply. This was also sent to years 4 - 6 at our three primary schools”.

As a result, they ended up with more engagement from young people than adults (as a percentage of the population). They believe that this will really help them shape the plan in a way that takes into accounts the needs and interests of younger people.

Part 2 - Making your plan digitally accessible

However you intend to present your plan online, you must think about digital accessibility. This is about more than having an easy to follow structure, it is also about how easy it is to navigate through the plan, its policies, maps and background evidence.

Why is it important to make your plan digitally accessible?

Having a plan that is digitally accessible and easy to navigate online is important for a number of reasons, including:

Securing greater engagement during the development of the plan: having a plan online that is easy to navigate will mean that stakeholders can understand what you are proposing much more quickly. This is likely to lead to increased engagement on your proposals and will in turn help you create a plan that really reflects the desires of the community.

Getting greater buy in and maximising its use, once the plan is made: an accessible plan that is easy to navigate will make it easier for people to use the plan once it is made. For example, it will enable developers to see exactly what is required of them and what is permitted where. This could help reduce conflicts with neighbourhood plans. It will also make life easier for LPA officers who will have to consider your plan as part of the development framework when considering planning applications.

Ways that you can improve the digital accessibility of your plan

Below we set out some things that can help make plans more digitally accessible.

Your plan could have a fixed (Static) URL, as opposed to a dynamic URL

A URL is often simply known as a web address. Having your plan as a fixed URL means that your neighbourhood plan will be easier to find when someone searches for your plan on a search engine (e.g., Google). Using a fixed URL also reduces the risk of broken links or information not being found in the future.

Your plan could be published in a web-based format

Plans often live online as pdfs. However, pdfs have a number of disadvantages:

- They do not change to fit the size of your device (e.g. laptop, phone, tablet), meaning that if you are looking at it on a phone, you may have to zoom in and out and scroll from side to side to be able to access the information you need.
- Not everyone has pdf software on their devices, meaning that some people will not be able to access the pdf.

- Pdfs usually open on a separate webpage, or download to somewhere entirely different, meaning that you are taken away from the page you were on.
- It can be difficult to navigate back and it frequently involves closing and re-opening the pdf to view the content again.

You could consider putting your plan online as an HTML website. HTML is simply a type of coding language used to make websites. To help you understand what we mean, here are some examples of plans published as HTML websites:

- [The Plymouth Plan](#)
- [The London Plan](#)

Have a go at navigating the plans on these websites. An advantage of publishing a plan as an HTML website is that the content will change size and fit to ensure it is easy to read on whatever device you are using, meaning you don't need to scroll from side to side. They are much easier to navigate and to find the information you need. They are also easier to find via online search engines such as Google.

Your plan proposals maps could be published in web-based formats

Publishing maps as pdfs makes them difficult to read and navigate. Publishing them as web-based maps allows them to be easily zoomed and panned so that people can see how policies relate to the areas of interest to them. Where possible, these could also be provided as an interactive map so that they link through to the wording of relevant policies in the plan. You could chat to your local authority about this, as this is something they may be able to support you with. Have a look at the [interactive map from the Hackney Local Plan](#).

You could provide a fixed URL for each policy in the plan

When policies are all bundled into a single report, it is harder for people to find, link or share them. This is particularly problematic if people are only interested in some of the policies in the plan. Instead, each policy could be given a fixed URL, so that they can be individually found and shared, without the need to scroll through lengthy documents.

Each of your policies could have a geospatial boundary published with it

It can be difficult to tell which policies in neighbourhood plans apply to which areas. For example, if design policies only apply to a specific area, it can be helpful to demonstrate exactly where these policies should be applied, making it easier for applicants and decision makers to understand exactly what is required of proposals in a specific location. Proposals maps will typically show the extent of some policies (e.g. site allocations), but usually not them all. You should talk to

your LPA mapping team to find out if they can support you with this, as it would involve specific software and your LPA may be able to help you as part of their duty to support.

Each of your policies could provide a link to the relevant evidence base that supports it

Some of your policies will be underpinned by very detailed evidence that often sits in a separate document to your plan. It can sometimes be difficult for users looking at policies to find the underpinning documents. This can be easily remedied by including a link next to the policy in the plan that will take the reader directly to the supporting evidence document. This will make it easier for local communities and other consultees to better understand the reasoning and justification behind each policy.

These recommendations will help make your documents more digitally accessible, making them easier for people to navigate and make sense of. Although you should seek to make your documents as digitally accessible as possible, there are a number of [minimum standards for accessibility](#) that you must adhere to.

Creating digitally accessible documents can sometimes be expensive. We therefore recommend speaking to your LPA to see whether they can provide any assistance as part of their duty to provide support. We also recommend working closely with your LPA to ensure that digitally accessible documents can and will be hosted in an appropriate format on the LPA website once made, particularly if you are considering using a portion of your grant from the neighbourhood planning support programme to help create these digitally accessible documents.

It is worth remembering that your plan will ultimately end up living on the LPAs website and become part of the local development framework. Before you make any final decisions around improving the accessibility of your documents, it is important to ensure that your documents will be compatible with the way your LPA presents plans.

Conclusion

In this chapter we have discussed the main steps you will need to take during the neighbourhood planning process and suggested some community engagement tools and techniques that may be useful to use at each stage. These recommendations should be read in addition to the earlier chapters of this toolkit, where we provide more in-depth information about these tools and techniques.

We then looked specifically at ways in which you can improve the digital accessibility of your neighbourhood plan – making it easier to navigate, understand and engage with, for all parts of your community and key stakeholders.

As ever, the tools and techniques we have discussed in this chapter are recommendations only. You understand your community better than anyone and the engagement methods you choose will ultimately be dictated by their needs and interests.

For specialist toolkits, guides, and support with neighbourhood planning we recommend visiting: neighbourhoodplanning.org

Conclusion

There is a vast and ever-growing range of community engagement tools available to us, both on and offline. The challenge is knowing which to use, when, for what, and for whom.

This toolkit is aimed at providing an overview of some of the more widely used tools and techniques, and to help you decide which are most suitable for your community engagement needs.

In order to decide which engagement tools to use, it is important to think carefully about your aims, audience, and limitations. Keeping these three key factors at the forefront of your mind throughout the community engagement process will help you achieve the outcomes you want.

You need to think particularly carefully about the demographic makeup of your community. We often find ourselves needing to find ways to reach and engage groups with very different needs and interests. In many cases this will require us to take different approaches. For example, younger people may be easier to reach through digital tools than older people; urban communities may be easier to engage through street stalls than rural people; some people have the confidence to speak in public meetings while others are more inclined to open-up in smaller groups.

In practice, you will almost certainly need to use a variety of methods if you are to truly capture the knowledge and views of all those affected by your project, idea or plan. This should include both digital and traditional methods – and in many cases will involve using a hybrid of the two. For example, it may be necessary to conduct the same survey using both digital and offline tools and then to upload the data for analysis². You may also opt to use the Placecheck method, which combines both traditional and digital activities.

Ultimately, there is no correct way to go about community engagement or make it a success. You understand your community's needs, composition and interests better than anyone, and therefore you are best placed to decide which tools will be more effective.

² See Caterham, Chaldon and Whyteleafe Neighbourhood Plan Steering group case study, page 19

Glossary

Analytics – The analysis of data and statistics that can be used to help improve your performance and decision making.

Blog – A regularly updated website or web page, often run by an individual or small group, that is usually written in a conversational manner with thoughts and reflections.

Community media – Independent media (such as community radio or pamphlet) based in the community they serve. Often non-profit.

Customisable – Able to be modified to fit a specific need.

Drag and Drop – A function that allows users to select a virtual object and ‘drag’ it to another place.

Focus group – A group of deliberately selected people, assembled to discuss an issue or product.

Functionality – The range of things a tool can do and how effectively it can do them.

Image library – A database of photographs, usually online.

LPA – Local Planning Authority.

Neighbourhood plan – A document written by a local community that sets out planning policies for the neighbourhood area – planning policies are used to decide whether to approve planning applications. neighbourhoodplanning.org

Pop-up installation – A temporary installation that can be used to show people plans or give people a taster of a project.

Public meetings – Meetings held in public spaces that are usually open to anyone within your community.

SMART targets – A tool for helping you plan and achieve your goals by ensuring your targets are Specific, Measurable, Achievable, Relevant and Timebound.

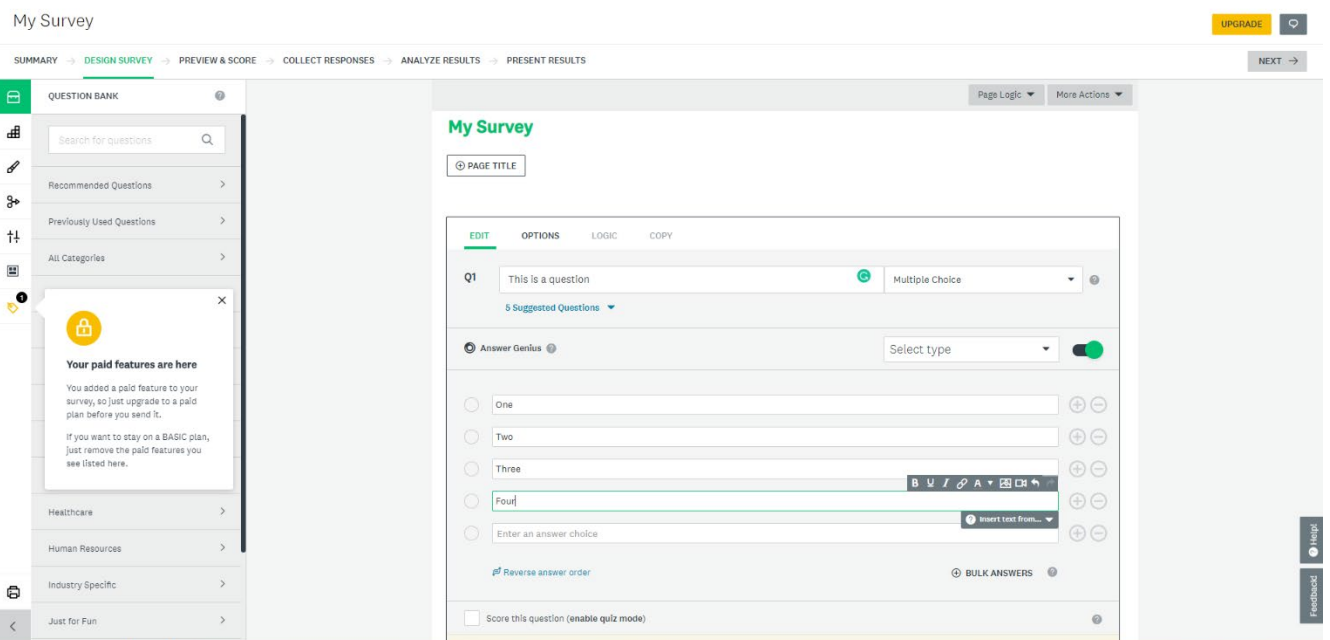
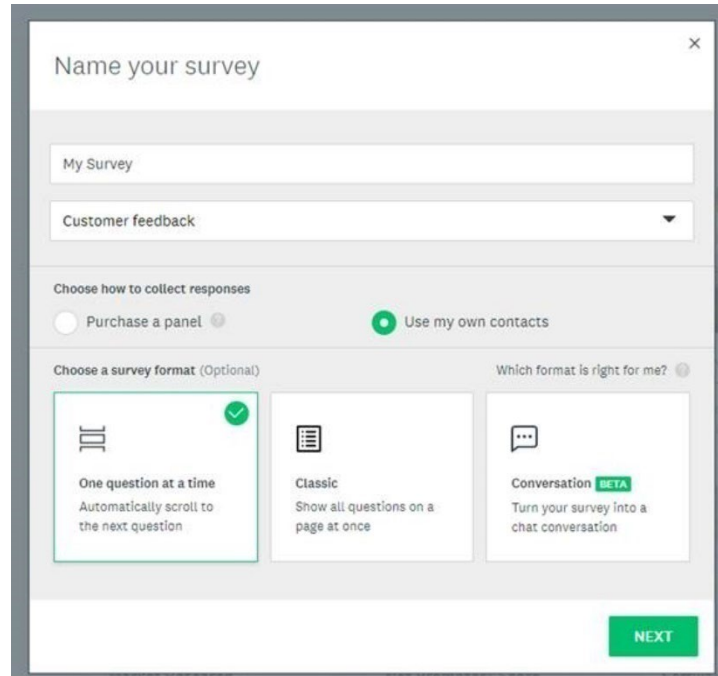
Social Media – Websites and applications like Facebook, Twitter and Instagram, that enable users to create and share content and participate in social networking.

Transect walk – A guided walk through an area that is facing development or transformation. Participants often draw a map with their observations, risks and potential solutions.

Video Conferencing – Conducting live video-based meetings.

Appendix

The images here provide a visual overview of the core functionality and design of SurveyMonkey. Go to [page 24](#) for more details.



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Locality is the national membership network supporting community organisations to be strong and successful.

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