IBI

Stakeholder Engagement in the Age of Social Distancing

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"The show must go on!"

1. The COVID-19 pandemic has upended, in a few days, the way we live, work, and interact with each other. While both the long-term effects on how we relate to each other and the impacts on our urban environments are still to be determined, we will soon need to rethink the way we discuss the design and approval of urban building projects with stakeholders.

2. The approvals process, although different from locality to locality, usually involves a series of touchpoints with multiple stakeholders— designers, experts, city departments, city councils, public agencies, interest groups, neighbourhood associations, the public at large— which we collectively label as stakeholder or public engagement.

3. Now that all those events— from simple meetings to multi-day charrettes— have been canceled or moved behind closed doors, the obvious question is: How will this impact the project review process, in the assumption that we will still want to ensure stakeholder input before project approvals?

4. What is already clear is that neither cities, developers, nor the public can afford to 'put on ice' all projects in the pipeline for months, just because it is not safe to engage in person as part of the process. The obvious, and simple, answer to this question is to use technology. We agree, in general, but there are things to consider as you dig deeper.

5. While many engagement roadmaps already involve the use of technology, e.g., online engagement, social media, etc., these engagement channels are usually a 'side show' of the main, official engagement process. Whether we are talking about workshops or public hearings, the official engagement process always involves activities where physical contact with people is inevitable.

6. Typically this physical engagement process works out reasonably well, because as humans, we can best interact face-to-face, in the knowledge that 60-70% of communication is [nonverbal](#). Additionally, the discourse, in person, is often more civil than on more anonymous online environments. To create productive, deep, and meaningful interactions, we know that in-person activities are essential.

7. However, we also know that not everyone can or is willing to participate at a physical stakeholder outreach event; more often than not, who participates at these meetings are people that are directly affected and oppose a measure, rather than the ones that would

benefit from it. Attendance at public engagement activities also tends to skew older, without directly reflecting, in most cases, the demographics of the area.

8. We have demonstrated that the number of people participating in an engagement process can be expanded tenfold by making available simple, engaging and intuitive online engagement tools (roughly mirroring the 90-9-1 rule). These tools allow a small number of physical 'creators' to be augmented by virtual 'contributors', reaching out to the 'silent majority' and balancing the skewed input of in-person events.

9. So far, we have typically utilized online outreach platforms to *complement* physical activities, but never to *substitute* them. With COVID-19, digital engagement is no longer a nice-to-have, but becomes the essential element of the engagement process. The question now is not "Should we do it?" but rather: "How do we do it?"

10. To approach this challenge in a practical and constructive way, we need to first understand the in-person activities that we currently use throughout a project's approval process. This understanding is important, as not all activities and events are created equal in terms of methods, dynamics, communication patterns, participation forms, participant quantities, etc.

11. For the same reason, the technology best suited for the virtual version of the supplanted physical activities will necessarily vary from case to case— and in some cases will need to be adapted to these new needs.
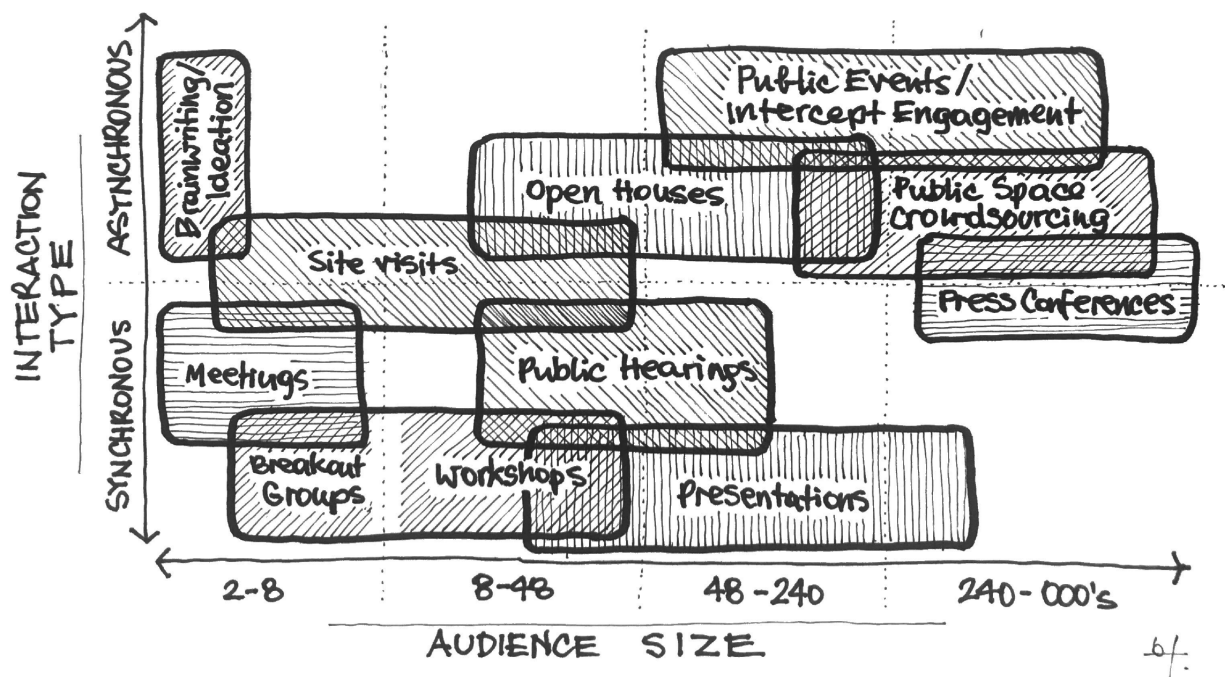
Figure 1. *The proposed stakeholder engagement typology organized by interaction type and audience size. Each of the engagement types will need a tailored technology solution to successfully transfer online.*

12. A straightforward and useful way to organize the forms of engagement activities is along two base criteria: (1) The *interaction type* between the participants, and (2) the *audience size* participating in the activity. While there may be other ways to 'slice and

dice' engagement activities, these two are critical because they are directly related to the types of technology that could be applicable for each case.

13. **Interaction type** focuses on the temporal alignment of the interventions by the participants in an engagement activity: Do they engage with each other at the same time, i.e., *synchronously* (such as in a workshop), or do they engage individually at their own pace, independently of whether they are in the same place with other people, i.e., *asynchronously* (such as during an open house)? This is important because it tells you what the technology chosen as a replacement needs to be able to do.

14. **Audience size** is straightforward: You cannot engage the same way with a large group as you would do with a small group. There are clear thresholds where the dynamic changes; up to 8 people is manageable for unstructured two-way conversations, up to 48 can have two-way conversations if there are rules to make it work, up to 240 is viable for events with structured (or semi-decentralized) communications, and more than 240 requires one-to-many 'broadcasting' events (or another form of decentralized, unlinked participation). All this is important because it tells you how many participants the technology needs to support.

15. We have identified ten types of stakeholder engagement activities or events that can be described through the lens of a two-dimensional interaction type vs. audience size matrix. Figure 1 above illustrates where each of the ten activities sits within this matrix.

16. Each one of the ten activities is a candidate to be 'translated' into a virtual format. There are certain existing technological applications that work best for each environment. For some of these, a mix of technology solutions may apply, given that there may not be an existing single application that does exactly what is required.

17. Asynchronous events are generally easier to transfer online, because they need not provide the protocols for people to interact with each other in real time. A survey can be responded in person or online in almost the same way, while a design charrette is difficult to translate online without losing its intrinsic dynamics.

18. Therefore, in some instances, what is currently one synchronous physical activity may need to be subdivided into a series of asynchronous virtual activities to accomplish the process' needs. For example, a design workshop may need to be split up into ideation, discussion, and selection phases to allow for input to come in and be distributed with the wider, virtual group.

19. Key criteria for choosing the most applicable technology (especially if the end user is the public at large) are the levels of usefulness, convenience, personalization, choice, experience, and involvement for the user. Applications should be as straightforward, intuitive, simple, accessible, ubiquitous, barrier-free and device- and operating system-agnostic as possible to maximize participation and reduce user frustration.

20. Of course, there are still equipment, equity and accessibility issues that will need to be figured out. Yet most people already own or have access to a smartphone or a computer. And in the current situation, likely they have someone at home that has a device to communicate. Existing engagement and communications software producers have already advanced towards making their platforms accessible to people with different abilities. In short, the world is moving in the right direction.

21. So far, we have only talked about mimicking the physical activities online. This is, however, an incredible opportunity to *reinvent* some of these activities from scratch. Think, for example, about the inefficiencies, inequities and anachronisms that are currently built into the review process or the public hearing process. This is a chance to reimagine, from the ground up, how the review process and its related activities should actually work.

22. Let's now move in detail to each one of the ten types. Starting with **meetings**, the most ubiquitous and simple engagement activity. Planning and approvals processes are full of these, and in-person meetings usually take place at the city offices.

23. Meetings are the easiest form to move online and there are many applications that are commercially available for this—Zoom, Meet, GoToMeeting, Teams, to name a few. Global A/E firms have been using these tools forever, but in many cases, city staff have not had the need to use them, as the attendees come to them at City Hall. Given the new reality, at least for the time being, this is no longer possible.

24. Setting up and using meeting teleconferencing is easy, but there is a critical function that is missing for building projects: The capacity to draw on top of plans. A secondary sketchpad software may need to be used in tandem to draw on plans to better illustrate a point being made, which many professionals already have in their laptops or tablets.

25. That said, one key functionality that appears to be missing in many teleconferencing apps is the ability to draw— not for the presenter, who could be using their own sketchpad— but also for the attendees *while not being presenters*. Some software, such as GoTo Meeting allow basic shared drawing tools, which has proven invaluable in discussing a project.

26. **Workshops** prove a much more complicated challenge than meetings, because they are so varied and involve many more methods and steps than the talking and minute-taking of a meeting. If they include tactile exercises and games like the ones we craft at IBI Group, they are even more complex to translate completely online in a synchronous fashion.

27. While workshops come in different shapes and sizes, if they are well conceived, they have at least one divergent-convergent learning cycle built into them. The divergent phase is where you explore and elicit creativity (such as brainstorming), while the convergent phase is where you discuss, prioritize and select (such as dot-voting).

28. More likely than not, to run successful workshops online, we will need to subdivide them into asynchronous pieces to allow the input generated at each stage, divergent and convergent, to be summarized and shared with the (online) group, before proceeding to the next step. Things that are simple to do in a physical space, such as dot-voting, require a virtual survey tool that needs more time to be set-up, shared, and answered online.

29. Therefore, a workshop may need to be parsed out into two, three, or four online engagement windows of a week each, where participants interact with one phase at a time, while facilitators collect, summarize and post the outcomes for the next round.

30. This is not necessarily a downside. It would allow people to participate at times that work best for them, but it will be essential to have tactics to ensure 'stickiness' so people

continue through all rounds. Examples of this include a prompt to register for the collective results for each round, drawing on people's curiosity of how the others voted.

31. Usually, physical workshops of more that 8 people use a technique of subdividing into smaller **breakout groups**. This is a time-tested tactic of maintaining meaningful two-way conversations without side-conversations emerging, nor the need to impose a strict protocol of rules (like the rules of a public hearing, for example).

32. If breakout groups are only conversational activities with a facilitator, they are easy to move online (see 'meetings' above). If they involve additional activities, however, they will need to be supported with other tools.

33. For prioritization activities within breakout groups or the larger workshop, online survey tools, such as GoogleForms or SurveyMonkey are good substitutes. Specialized engagement tools like Metroquest and CivilSpace are good for conveying look & feel and design options. Survey tools that allow for the group to see the results of each survey in real time, like Poll Everywhere or Poltio, have the advantage of being able to build on the insights as the discussion moves along— something very important to encourage stickiness of participants.

34. For design-related activities like board games or co-design, the problem becomes more complex, as the playfulness and the related conversations of the design work are difficult to move online; recreating workshop exercises digitally in a synchronous fashion will be the toughest challenge of the process activities.

35. One straightforward but modest solution for co-design will be for the facilitators to use a sketchpad, ideally one that can be shared, to document the process, as mentioned before. This will still have the barrier of only one person controlling the pen and/or not everyone being apt or able to draw on a virtual sketchpad.

36. Beyond that, there are examples where gaming software, such as Minecraft, has been used for co-design. Additionally, IBI Group is exploring the pairing of parametric models with survey software that incorporates user selection to show, in real time, the effect of collective decisions on the end result. There will need to be more research on this front to have streamlined, easy-to-use and -understand tools for most people.

37. **Ideation** (or brainwriting) activities are usually a sub-set of a workshop or a breakout group but constitute a different type in terms of the tool needed, because they happen asynchronously with participants. An example of this activity is the typical post-it exercises where a participant writes a concern or aspiration down or draws a picture to define an idea. This is done individually by each participant before being shared with a group.

38. For these activities, there are a few online engagement platforms that contain the ideation functionality, such as MindMixer, EngagementHQ, and socialpinpoint. Many of them also contain built-in capabilities for the phases after ideation, i.e., discussion, ranking, and selection of ideas. Using these tools, the ideation process needs to be open for an extended period of time, say a week or two, to collect all ideas and then proceed to vet them for review.

39. **Site visits** benefit from participants being physically in a place and there are clear limitations for their transferability online. That said, they are part synchronous and part asynchronous— you could theoretically do a visit by yourself with an audio guide

and discuss with a broader group after everyone had completed their visits. Thinking of them this way makes it easier to imagine their transfer to the digital realm.

40. The obvious choice for site visits is narrated video tours that people can download and watch at their leisure. There are some limitations on the full personal experience of a location through video, but it is better than having to remember it from memory or being described by someone.

41. The use of digital tools opens additional opportunities for site visits, especially for projects that have yet to be built. Immersive VR experiences are the best form but will likely need to be streamed on video to be accessible, as very few people will have the appropriate equipment to interact with VR software. Another option is to provide online before-after pictures with sliders, which IBI Group has done in multiple occasions in the past.

42. A **presentation,** where one person presents a subject to a larger audience, is easily moved online; there are multiple commercial software apps like GoTo Webinar or Webex that are set up to do exactly that. Moreover, they contain tools that enhance the process, like chat windows, real-time polls, and question buttons.

43. In contrast to presentations, which are one-to-many communication activities, **public hearings** are designed to allow many-to-many interactions. A relic of times past to (nominally) ensure stakeholder participation, they contain highly regulated procedures to ensure the process is fair and transparent, allowing a voice for everyone present to voice their opinion.

44. However, most people today would agree that the process has inherent flaws, notably the reliance on a physical public meeting, which skews towards participants who hold positions that in many cases are not supported nor benefit the public good. The process worked reasonably well in the progressive era of the 20th century, but our cities and the world have changed substantially at this point.

45. Broadly speaking, public hearings consist of four elements: Presentations by staff, interventions by the public, deliberation by the public body, and voting. Each one of these actions should be able to be moved online, in the understanding that even the voting members themselves will not be able to congregate physically in the same place.

46. Perhaps the best platform to run a virtual public hearing will be a webinar website as previously described; it allows for all people to sign-up in advance, both for listening in, as well as to participate in interventions if they choose to. That way city staff can ensure that, whoever is participating, is in fact a citizen of the jurisdiction.

47. The webinar app will allow for the introductory presentation to happen, as well as for questions to be asked in writing or by virtually "raising your hands". It will also allow participants to be granted air time to voice their comments, opinions and concerns, all centrally controlled by the webinar organizers.

48. One central improvement for the public hearing would be to increase transparency regarding how people feel about each citizen intervention by utilizing the application's poll function (or another real-time polling tool). The information of the poll, displayed right after each intervention, would provide invaluable insights to decisionmakers and the public regarding the overall community sentiment to each point—*before* a vote is called. The vote could also be cast using the polling software, if desired.

49. **Open houses,** while usually a place where large numbers of people congregate, are, surprisingly to some, asynchronous activities: Each person interacts with staff, boards and activities individually, choosing when to come, when to leave and what to participate in. Importantly, open houses serve a public education function beyond gathering participant input.

50. Because of their asynchronicity, open houses are well suited to move online. Many of the online engagement platforms already mentioned (CivilSpace, EngagementHQ, Metroquest, etc.) serve the information, education, and feedback functions usually done at the physical events.

51. Some physical engagement activities are pushed to broader audiences at **public events**, where input is sought from people through **intercept engagement**, e.g., a project stand at a race or a farmers' market. In these cases, the physical nature of the event is paramount, and the online version of this will need to shift, again, to online engagement platforms, as explained above for open houses.

52. Sometimes, engagement in public spaces is not tied to a public event, but only elicits participation by passersby through informal **public space crowdsourcing**; these are passive activities like the large blackboards with a trigger question ("I imagine our neighborhood will be…") with chalk for people to add to the conversation.

53. The online version of these activities can, as well, easily shift to online engagement platforms, either in their unstructured online forums, or through a more targeted survey with open-ended text boxes or wordclouds.

54. Finally, **press conferences** are, by their very nature, one-to-many broadcasting activities, with the physical engagement activities circumscribed to questions (usually by reporters). The online version of this will be most likely be a presentation run on a webinar platform, where questions can either be submitted in writing or by "raising a hand" and opening up the mic to the participant.

55. **In summary:** Our world is changing fast– and physical engagement, for all the benefits it provides, is cut out of the equation for the foreseeable future. Technology, if well utilized and attuned to the specific engagement need, can be leveraged immediately to do most of what we do now in a face-to-face setting. The apps are already out there; it's up to us to leverage them the best we can.

56. This current challenge is not just about moving from physical to virtual and then returning "back to normal" once the pandemic subsides. This is an incredible opportunity to reshape engagement so it is broader, deeper, and more meaningful for all. And should we dare to say more fun too?

57. YouTube first started as a site mirroring what we already did before (upload cat videos), but then creative people leveraged the capabilities of the platform to do something new altogether (vlogging). Similarly, we should use this moment to rewrite the engagement playbook and create a "new normal." Oh, the places we can go!