BEST PRACTICES IN CITIZEN/CUSTOMER SERVICE

free webinar

10:00 - 11:30 a.m. Pacific Time, Thursday, May 11, 2017

*** Advance registration required for this no-charge webinar ***
https://attendee.gotowebinar.com/register/4812060297331296002

Webinar topics:
1. What are agencies doing to raise the bar of service delivery and cost effectiveness?
2. How are agencies engaging citizens to be more than simply consumers of service?
3. What are some future prospects for enhancing citizen/customer experience?

Presenters:
* Bob Harrison, City Administrator, and Emily Moon, Deputy City Administrator, Issaquah, WA
* Rob de Geus, Community Services Director, Palo Alto, CA
* Mark Maliszewski, Senior Manager - Business Intelligence and Customer Experience, Charlotte, NC

Audience: all employees

Meets Practice 3 (Functional and Operational Expertise and Planning), 4 (Citizen Service), and 5 (Performance Measurement/Management and Quality Assurance) of ICMA’s Practices for Effective Local Government Leadership.

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There is no charge for participating in the webinars, but each requires advance registration.

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2. Connect with the webinar and audio:
Use your logon information from the email confirmation you receive via email from GoToWebinar. We recommend the telephone option dial-in number provided by GoToWebinar for sound quality. Depending upon your internet connection, VOIP option for audio (computer speakers) can have delays or sound quality issues.

3. Ask questions:
You may submit questions anonymously via email to ICMACoaching@donmaruska.com in advance or via the webinar during the panel discussion. As moderator for the session, Don Maruska will pose the questions.

4. Presenters’ presentation materials: We post these with the Agenda at “Agendas & Archives” tab of http://icma.org/coachingwebinars. The PPT will be available 24 hours before the webinar.

After a webinar occurs, a digital recording along with a PDF of the presentation materials and results of the polling questions will be available after 24 hours at the "Agendas & Archives“ tab of http://icma.org/coachingwebinars.

Post-Webinar Group Discussions:

Many agencies are organizing groups to participate in the webinars (live or recorded) and discuss the topics among themselves after the webinars. Some are summarizing their discussions and distributing them to managers throughout their organizations. Use the Coaching Program as an effective way to enhance professional development in your agency. Here are some discussion starters for this session.

a. Where does our agency have opportunities to improve service to citizens and other constituencies?
b. How can we work with the public to enhance the value of our services?
c. What are strategies and examples that we'd like to consider?

MORE RESOURCES--See http://icma.org/coaching for valuable resources to boost your career. Sign up for the complimentary email list at http://icma.org/coachinglist to keep informed of the details for future ICMA Coaching Program sessions and other resources.

Enjoy the resources and support to thrive in local government.

Don Maruska, MBA, JD, Master Certified Coach
Director, ICMA Coaching Program – thrive in local government
Author of “Take Charge of Your Talent” www.TakeChargeofYourTalent.com
**Bob Harrison**, City Administrator, Issaquah, WA

Bob Harrison is the City Administrator of Issaquah, Washington where he has served since 2010. He has previously served as City Manager or Administrator in communities in Ohio and Wisconsin during his 25 year career in Public Service. Bob received his Master’s Degree in Public Administration from the University of Wisconsin-Milwaukee and his Bachelor’s Degree from Marquette University in Political Science and International Affairs. Bob served as an ICMA Vice President from the West Coast region from 2013 – 2016 and was on the Membership Committee, serving as the chair the final year of his term.

**Emily Moon**, Deputy City Administrator, Issaquah, WA

Emily Moon is the Deputy City Administrator of Issaquah, Washington. Prior to joining Issaquah in 2014, Emily served in similar capacities in cities in Colorado and Connecticut, and worked for the Michigan Municipal League. She has undergraduate degrees in political science and psychology from the University of Oregon’s Honors College and a Master’s of Public Administration from the University of Michigan’s Ford School.

**Rob de Geus**, Community Services Director, Palo Alto, CA

Rob de Geus is Director of Community Services for the City of Palo Alto and has worked for the City for the past 17 years. He has focused his professional career on building strong and healthy communities through community services, believing that parks, recreation, human services and the arts play a fundamental role in connecting people to the City in which they live, work or visit. Areas of focus and passion include
community health and wellbeing, accessibility, citizen engagement and innovative public private partnerships.

As Director of Community Services for Palo Alto, his role includes oversight of three council appointed commissions, five non-profit support organizations, frequent council interaction and a fulltime staff of 80 FTE, part time staff of 73FTE. The Community Services Budget is $26M budget with a $7M annual revenue goal.

Mark Maliszewski, Senior Manager
Business Intelligence & Customer Experience, CharMeck 311 – Charlotte, NC

Mark Maliszewski is part of the leadership team of a 100+ member contact center that provides service and information to the over 1 million residents of Charlotte and Mecklenburg County NC. He is responsible for ensuring that the center's people, process and technology meets the current and future needs of customers, identifying opportunities for quality and cost efficiency gains and providing additional channels for citizen access through technology implementations.

Mark has extensive experience in customer service and contact center operations in the public and private sector. Prior to joining the City of Charlotte in 2009, Mr. Maliszewski led customer service operations in the financial services, insurance and pharmaceutical industries for Fortune 100 organizations. He recently co-authored an article, “You Can't Manage What You Don't Measure” for Alliance for Innovation newsletter that details how CharMeck 311 transformed operations through the effective use of data analysis.
Welcome

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Overview of Session

Webinar topics:
1. What are agencies doing to raise the bar of service delivery and cost effectiveness?
2. How are agencies engaging citizens to be more than simply consumers of service?
3. What are some future prospects for enhancing citizen/customer experience?

Presenters:
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• Rob de Geus, Community Services Director, Palo Alto, CA

Moderator:
• Don Maruska, Director, ICMA Coaching Program, and author “Take Charge of Your Talent”

…and polls and questions along the way.
Polling Question #1

How many people are listening on your line?
Welcome to Issaquah

Nickname: Trailhead City
Population: 34,590
Today’s Webinar

Two parts:

- Social Media (Bob)
- Public Engagement Toolkit (Emily)
Social Media Takeaways

- Social media is an effective and inexpensive tool to provide citizen engagement and service.
- Social media allows you direct access to your customers.
- Social media enables your community to develop a personality that can build trust and goodwill.
Service Delivery

- Know your customers: We serve a tech-savvy community that uses a variety of social media with an expectation of professional and rapid service
- Limited resources: Reduce calls and front counter traffic
- Convenience: Doesn’t require customers to come to us
- Engagement: Find ways to engage a larger portion of your community that doesn’t involve just showing up to meetings
Our Platforms
#AtYourService

@cityofissaquah thank you always for being happy and courteous even when I'm beyond cranky or so tired I can't talk straight.

- 24/7 customer service desk
- Respond to 98 percent of social media interactions in less than 24 hours
- Respond to 72 percent of interactions in less than 60 minutes
Solve Problems
Answer Questions

@cityofissaquah any idea what this is? Found it on a local hike off Newport way pic.twitter.com/SWKLSYBu1

@matloud Yup! It's a storm drain. The orange color is due to high iron content in the groundwater creating iron oxide. #TheMoreYouKnow
Anyone know of anywho issaquah that's hiring?

@morganbrennan We're hiring May 28 with lots of local er
bit.ly/RbOocU IssyJobs

Was watching city council business on ICTV and noticed there were no plaques on desks to identify members. I've watched city council meetings for other cities and there's always a name plate clearly visible so that viewers can see who's who -- the movers and shakers in town.
Receive Feedback

Garthe Photo Arts
@garthephotoarts
I love having public #wifi at the #Issaquah #park! Thanks Issaquah! #wa
pic.twitter.com/9gPXOeIJZA

Joe Heiser
@ThePnut_Gallery
Trash can where there was none before and @cityofissaquah make a good team
pic.twitter.com/aISN8V14Rp

Bernadette E Anne
@BernadetteEAnne
It's only 2pm Tue after huge weekend windstorm and I see @CityofIssaquah streetsweeper on my street. Love #Issaquah!
pic.twitter.com/72rGffyNCy
Build Community

Mindy @Minderella71
Thanks for joining us last @cityofissaquah police! "teaching" you to knit!

Ann Peavey @issaquahMaven
Reconnaissance @cityofissaquah by soaring eagles, towering trees! @Frogales:

Lincoln Vander Veen @lincoln_veen
@cityofissaquah park on SquakMtn on a B-E-A-U-tiful Sunday afternoon! #Charlene #Issaquah #IssaquahGoneWild
Have Fun!

bit.ly/legendaryissaquah
Key Takeaways

- Create culture of creativity
- Go to your customers – don’t expect them to come to you
- Create an online personality/brand that reflects your community values
Social: Challenges

- Electeds aren’t always included
- Difficult to “close the loop” with decision makers
- Can feel impersonal – there’s no tangible person behind feedback
Data Vs. Narrative

East Sunset Way

Facebook and Twitter Posts
We've got one question for you: It won't all fit! What's your top priority for East Sunset Way from I-90 to Second Avenue — a main route to four local schools?
- Reduce travel time
- Preserve street parking
- Add bike lanes
- Add landscaping

Reduce travel time: 77.06% (1,790 votes)
Add bike lanes: 9.08% (211 votes)
Preserve street parking: 8.31% (193 votes)
Add landscaping: 5.55% (129 votes)

Total Votes: 2,323
Polling Question #2

In which ways would you like your agency to use social media?
Idea: Toolkit

http://issaquahwa.gov/toolkit
Why a Toolkit?

- Engagement varies citywide
- No one way to conduct engagement – flexibility is key
- Common language with staff, council and public
Why is This Important?

- Heart of our roles as public servants
- Provides Council quality public input
- Ensures community voices are heard
Where Does My Project Fit?

<table>
<thead>
<tr>
<th>DELEGATION TYPE</th>
<th>INFORM</th>
<th>CONSULT</th>
<th>COLLABORATE</th>
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- **GO FOR IT!**
- **CONSIDER IT**
- **NOT TYPICALLY NEEDED**
Determine Engagement Level

LEVEL OF PUBLIC FEEDBACK

COLLABORATE   CONSULT   INFORM
Tools: Workshop

bit.ly/sunsetwayvideo
Tools: Workshop
Tools: Peak Democracy

What's your vision for Issaquah's parks and trails? Tell us!

Concerning our community's existing parks and trails, how are we doing? What are the strengths? What needs to be improved?

Answered: 66
Skipped: 6
Tools: Neighborhoods
Toolkit Takeaways

• Provides consistency
• Sets boundaries
• Low implementation cost but requires time for staff training
What’s Next?

- Staff training
- Closing loop with elected officials:
  Finding what works
- Be cognizant of TOO much engagement
Polling Question #3

In which of these ways is your agency engaging citizens in service delivery?
CharMeck 3-1-1
It’s More Than Just A Number

To build a stronger community, one interaction at a time, by connecting internal and external customers through seamless service.
CharMeck 311 at a Glance

FY06 July 2005 launch:
- 94 FTEs
- Operating 24/7 & 365 days
- Funded from existing resources - $4.1 M start up costs
- 26% funding provided by Mecklenburg County
- $2.3 M operating budget
- 1.35 M calls - soft launch/no marketing

FY16
- 114 FTEs
- Operating 7am - 7pm, Mon – Fri; closed holidays
- $8.5M Operating budget
- 1.63M contacts-1.15M calls; >450K self service
1. Performance

1.6 Million total contacts, 74 consecutive months meeting all service level objectives

2. Contact Types

Water account calls are 39% of total call volume, over 14 city and county department customers served.
Self Service Options

451K Citizen Self Service via Interactive voice response, web and mobile

CIA Program

Community Information Academy has been in existence for 6 years, currently enrolling 16 students annually
Building Strong Communities

Community Action team participates in over 40 events a year
Animal Kneads Day  summit for social good

Neighborhood Leadership Award
Mayors Alliance

walk in the park  Thrift Baptist Church  city council

Shred it!  Digital Charlotte  safe alliance

schools  pet palooza  community fair

STARMOUNT ELEM. PARENT EVENT

Arab American Festival  UNCC

West BLVD NNO  Charlotte Jewish Day School

CHARLOTTE RESCUE MISSION  Max at Alderstage
A Letter to the Community


We, the 11 members of Charlotte City Council, hear the anger, frustration and need expressed both in the streets and in our Council Chamber. We have been working to address many of these concerns, and we can and will take additional action. We commit to you that our approach will be inclusive, and we value all voices in this process. We must enact policies, initiate programs and collaborate meaningfully to do this work together.

We recognize that there are some people who enjoy relative wealth, prosperity and opportunity while others struggle to find good paying jobs, affordable housing, and some may not trust law enforcement. Our challenges are no different than in other places in this country.

Our love, passion and pride for our city demand action. To move forward requires everyone’s help. When our community comes together, great things happen. This is our spirit. This is our culture. This is our city. We will lead. We will act. We will do this together.

To that end, this City Council pledges its energy and focus on three key areas for further discussion and action at upcoming City Council meetings beginning on Oct. 10:

- Safety, Trust & Accountability
- Access to safe, quality and affordable housing
- Good paying jobs

For Safety, Trust & Accountability, we support our Police Chief and the men and women of the Charlotte-Mecklenburg Police Department, including our Chief’s continued efforts to enhance trust and accountability within the Department and within the community. We will also continue to review and implement the recommendations from the President’s Task Force on 21st Century Policing.

For Housing, we seek to accelerate funding for housing, with the goal of creating 5,000 workforce and affordable housing units in three years so those who work in our City can live in our City.

For those in need of Jobs, we seek to invest $1 million in a new workforce development program that will increase jobs, training and opportunities for our youth and individuals with multiple barriers to employment.

We ask our federal, state and local partners across the public, private and non-profit sectors to join us. This is just a start with more to follow. Through it all, we ask that you hold us accountable as we build a stronger and more inclusive Queen City.

Members of the Charlotte City Council

Office of the City Council 600 East Fourth Street Charlotte, NC 28202-2843 704/336-2241
Community Letter

Charlotte’s Community Letter is about everyone working together – across all communities – to make Charlotte the best city for all. That means four things in particular:

1. Trust in community policing
2. Quality, affordable housing
3. Good jobs and the skills to get them
4. Other opportunities: the community letter is just the beginning.

Charlotte City Council adopted these actions to address our city’s challenging issues in partnership with the community at-large, following the Charlotte demonstrations.

For more information about the Community Letter and related efforts, visit charlottenc.gov/communityletter
The Community Letter in Action

City services and programs directly tied to the Community Letter include:

**Safety, Trust & Accountability**
- Body Worn Cameras
- Community Safety Forums
- High School and Middle School Youth Symposia
- Reach Out Program
- Response to Activists’ Demands
- Citizens Review Board
- Youth Diversion Program

**Quality, Affordable Housing**
- 5,000 workforce and affordable units in next 3 years
- Strategic Housing Plan & Strategy
- House Charlotte program
- Housing and Neighborhood department alignment
- Housing Trust Fund
- Expedited permitting and review process for affordable housing units

**Good Paying Jobs**
- Train workers in high demand occupations
- Address labor market shortages
- Remove barriers for potential workers
- Job placement, career coaching, case management & other supportive services
- Youth employment & mentoring
- Enhancement of Mayor’s Youth Employment Program

**Community Engagement**
- Community forums co-hosted with Community Building Initiative
- Pop-up meetings across the city
- Take 10 – city employee ambassadors talking with residents
- Feedback surveys

**City Operations**
- Internal Opportunity Team formed
- Review of city employee benefits for potential changes related to economic mobility
- Develop apprenticeship program for city jobs
- Review of city policies, services with a lens of economic mobility

**Key Accomplishments**

1,603 Housing Units to date
1,800 Additional Body Worn Cameras approved by City Council
30+ CMPD hosting community meetings each month across the city
1,000 Youth will receive job and career readiness training by June 2017
489 Youth ages 16-18 will complete mock interviews in preparation for jobs and internships
4,000 Youth involved in career readiness experience

**Data**

Available to the public on city’s website
Capitalizing on engagement infrastructure

The Take Ten Initiative & Pop Ups

Knight Cities Challenge Project engaged employees to have short conversations with the public

Civic Leadership Academy

Diverse residents participating in course who are ready to take the next step in being community leaders and improving quality of life in our City

311 Call Center

Specialists trained in customer service
Transitional Statement:

We’re working with a project called Take 10 Charlotte, an initiative to build connections and find ideas to improve Charlotte, and your call was selected to provide feedback about Charlotte’s Community Letter.

Have you heard about the community letter?

If Yes: Great!

If No: On October 3, 2016, Charlotte City Council issued a letter to the community outlining goals for policing, housing and jobs to address the concerns of citizens following public demonstrations in Charlotte. The Community Letter is about everyone working together – across all communities – to make Charlotte the best city for all. Do you have a few minutes to answer 10 questions about important community topics?
Early Results

- 1,464 conversations and responses
- 1,263 conducted by CharMeck 311 employees
- Majority of respondents had not heard about the Council Community Letter
- 50% of respondents ranked Safety, Trust and Accountability as most important
- Balanced cross sections of race / ethnicity, age and gender and resident location
How residents feel about the conversations

- “Very informative”
- “Great idea to ask citizens to ask questions like this and get input.”
- “Grateful for the survey and getting feedback from citizens.”
- “Hesitant to think the council will do anything with this letter”
- “Respondent teaches and cares for young children. She was encouraged to know that The City is reaching out to people and have a number of things underway. I told her about the Opportunity Task Force and the release of its report.”
Feedback from civic leaders and callers

‣ “Some people are really getting involved and talking for a long time”
‣ “Surprised how many people were willing to take the survey”
‣ “Some interesting answers”
‣ “People seemed happy that we (city) were being proactive”
‣ “I was excited to have this conversation because I suspected that she and I had very different perspectives and experiences around the topics at hand. I was right! It was interesting to learn more about her opinions and thoughts on things (as a wealthy, white woman) and be able to talk to her a little bit about how I viewed things, especially after interacting with and learning from such a diverse group in the Civic Leadership Academy.”
‣ “He was passionate about the importance of good paying jobs even though, as he pointed out, "I have a good job." It was such a pleasure to speak with him. He was very open to our conversation and introduced me to another respondent who was inside the place where we he and I met. (I found this very inspiring!!)"
‣ “She was very open and extremely authentic during our conversation. Although we were strangers, we really connected.”
Key Takeaways

- Continually evaluate your operation, what can we do to better serve our community and partners?
- After people, your most important resource is Time.
- Invest that time in your people; they are already engaging the community on a daily basis: What do customers really want?
- Take action: how can we align our services to better serve the community?
- Repeat!
CharMeck 3-1-1

It’s More Than Just A Number
Polling Question #4

Which of the following would be desirable for your agency?
City of Palo Alto, CA

- 66,000 residents
- City known as birthplace of the Silicon Valley
- Home to 7,000 businesses employing 98,000 people
- Highly engaged citizenry with strong local pride in community
- Numerous neighborhood (33 if you can believe it)
- Top rated public school system - 12,000 students
- Home to Stanford University City of Palo Alto
Overview

I. Project Safety Net Community Collaborative for suicide prevention and youth well-being

II. Multi-layered community outreach for our Parks, Trails, Natural Open Space and Recreation Master Plan
The Palo Alto community shaken a teen suicide:

- Five teen suicides in an 8-month period, all from the same school, all occurring by train, all occurring at the same location

- Our community was in crisis
Before Project Safety Net

A somewhat unstructured network of support for Palo Alto's Youth and Teen's
Social Ecological Model
Project Safety Net: Collective Impact

The 5 Conditions of Collective Impact

1. **Common Agenda**
   - Common understanding of the problem
   - Shared vision for change

2. **Shared Measurement**
   - Collecting data and measuring results
   - Focus on performance management
   - Shared accountability

3. **Mutually Reinforcing Activities**
   - Differentiated approaches
   - Coordination through joint plan of action

4. **Continuous Communication**
   - Consistent and open communication
   - Focus on building trust

5. **Backbone Support**
   - Separate organization(s) with staff
   - Resources and skills to convene and coordinate participating organizations
Our mission is to develop and implement an effective, comprehensive community-based mental health plan for overall youth well-being in Palo Alto.

The plan includes education, prevention and intervention strategies that together provide a Safety Net for youth and teens in Palo Alto, and defines our community's teen suicide prevention efforts.
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<tr>
<th>EDUCATION</th>
<th>PREVENTION</th>
<th>INTERVENTION</th>
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<tr>
<td><strong>E-1 Mental Health Curriculum in Schools</strong></td>
<td><strong>P-1 Youth Outreach</strong></td>
<td><strong>I-1 Adopted Suicide Prevention Policies</strong></td>
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<td><strong>E-2 Community Education</strong></td>
<td><strong>P-2 Mental Health Support for Students</strong></td>
<td><strong>I-2 Screening</strong></td>
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<td><strong>E-3 Media Education</strong></td>
<td><strong>P-3 Character Education &amp; Resilience Skill Building Programs</strong></td>
<td><strong>I-3 Peer to Peer Counseling</strong></td>
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<td><strong>E-4 Mental Health Training for Teachers</strong></td>
<td><strong>P-4 Reduction of Lethal Means to Self Harm</strong></td>
<td><strong>I-4 Surveys/Assessment of Risk</strong></td>
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<td><strong>E-5 Crisis Manual and Safety Plan</strong></td>
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<td><strong>I-5 Gatekeeper Programs</strong></td>
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<td><strong>E-6 Accessible Resources on Suicide Prevention and Depression</strong></td>
<td><strong>I-6 Affordable and Expanded mental Health Care</strong></td>
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<td><strong>E-7 Reduction of Harassment and Social Cruelty</strong></td>
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<td><strong>I-7 Crisis Hotline</strong></td>
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<td><strong>E-8 Supportive School Environment</strong></td>
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<td><strong>I-8 Support for Highest Risk Youth</strong></td>
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<td><strong>E-9 Grief Counseling for those Impacted by Suicide</strong></td>
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<td><strong>I-9 Organized Health Care Provider Network</strong></td>
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<td><strong>E-10 Organized Health Care Provider Network</strong></td>
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Project Safety Net: Community Collaborative Teams

PSN partner organizations and individuals working together to develop action plans for each PSN strategy
Project Safety Net: Lessons Learned

“HOPE is when you are able to see how you can get from where you are to where you want to be.”

Jess Brooks, 2009 Palo Alto High Alumni
Polling Question #5

How is your agency addressing needs bigger than it can address alone?
Parks, Trails, Natural Open Space & Recreation Master Plan
Parks and Recreation Services

Oversees 4,500 acres of park land for its customers to explore, recreate and relax. It includes:

- 40 miles of hiking trails
- 30 playgrounds
- Community Pool/Swim Program
- Golf Course
- 300 individual garden plots
- 24 tennis courts
- 6 basketball courts
- 14 baseball fields
- 3 dog parks
- Special community events

City of Palo Alto
Multilayered Engagement

- On-the-ground “intercept events”
- Online map-based survey
- Online community surveys
- Parks and Recreation Commission consultation
- Stakeholder interviews/meetings
- Community workshops
- Webpage, social media/email updates
- Prioritization challenge/workshop
Park-let on a Downtown Parking Space
Creative, engaging, fun

A. I really like it
B. I would consider it
C. No way
D. I’m not sure
Mapita Online Survey

- Map-based data collection
- 2 email blasts to 16,000 people
- Social Media Postings
- 487 responses

Map of Bowden Park with comments:
- Bike tunnel is difficult to navigate with kids in tow.
- A lot of bikes enter the sidewalk here to get to the Caltrain underpass. It would be nice to have a method to make it safer for the merging of bicyclists and pedestrians.
- Underground pass barriers make it very hard to ride with a stroller.
- Long cycle lane.
- Please remove the world's ugliest statue from this spot.
- Lots of bikes enter the sidewalk here to get to the Caltrain underpass. It would be nice to have a method to make it safer for the merging of bicyclists and pedestrians.

Find Your Favorite Parks:
First, locate all the parks you visit in Palo Alto.

Click first on the marker below to see the map and you can move either the marker or the map to place it on the park. You can zoom and move around the map using your mouse or the buttons on the map.

Repeat this for all the parks you visit in Palo Alto.

Which parks do you visit in Palo Alto?

Now locate your favorite park. Clicking on the yellow marker will bring you back to the map to place this point.

Pick your (one) favorite park
Community Prioritization Challenge/Workshop

• Online interactive prioritization exercise
  - Allocating dollars to areas of focus
• 731 responses
FINAL Master Plan Includes: Principles, Goals, Policies, Programs and Implementation Plan

GOALS:

1. Provide high-quality facilities and services that are accessible, inclusive, and distributed equitably across Palo Alto.

2. Enhance the capacity, quality, and variety of uses of the existing system of parks, recreation, and open space facilities and services.

3. Create environments that encourage regular active and passive activities to support health, wellness, and social connections.

4. Preserve and integrate nature, natural systems, and ecological principles throughout Palo Alto.

5. Develop innovative programs, services and strategies for expanding the system.

6. Manage Palo Alto’s land and services effectively, efficiently, and sustainably, utilizing quantitative and qualitative measures.
Takeaways, Lessons & Resources

- Parks and Recreation Commission - Ad Hoc committees
- Aspirational versus Specific and Practical
- Council study sessions & action oriented updates
- Alignment between companion City plans
Thank You!

Rob de Geus, Director of Community Services
Robert.degeus@CityofPaloAlto.org
Project Safety Net Resources

• Project Safety Net http://www.psnpaloalto.com/

• Organizing a Community Response to Suicide
  https://www.sccgov.org/sites/mhd/Providers/SuicidePrevention/Documents/SCCMHD_Organizing-a-Community-Response-to-Suicide.pdf

• PAUSD Comprehensive Suicide Prevention Toolkit for Schools

• National Action Alliance for Suicide Prevention: Framework for Successful Messaging
  http://suicidepreventionmessaging.actionallianceforsuicideprevention.org/


• Social Media Guidelines for Mental Health Promotion and Suicide Prevention

• Crisis Text Line http://www.crisistextline.org/

• National Suicide Prevention Hotline https://suicidepreventionlifeline.org/
Resources:

• Parks, Trails, Open Space and Recreation Master Plan Project
  http://www.paloaltoparksplan.org/

• City of Palo Alto http://www.cityofpaloalto.org

• City of Palo Alto Community Services Department
  http://www.cityofpaloalto.org/gov/depts/csd/

• City of Palo Alto Park and Recreation Commission
  http://www.cityofpaloalto.org/gov/boards/parks_and_recreation_commission/default.asp
Contacts for today’s session

Presenters:
- **Bob Harrison**, City Administrator, BobH@issaquahwa.gov, and **Emily Moon**, Deputy City Administrator, EmilyM@issaquahwa.gov, Issaquah, WA
- **Mark Maliszewski**, Senior Manager - Business Intelligence and Customer Experience, Charlotte, NC mmaliszewski@ci.charlotte.nc.us
- **Rob de Geus**, Community Services Director, Palo Alto, CA Robert.DeGeus@cityofpaloalto.org
- **Don Maruska**, Director, ICMA Coaching Program, and author “Take Charge of Your Talent” ICMAcoaching@donmaruska.com
Post-webinar discussion questions

a. Where does our agency have opportunities to improve service to citizens and other constituencies?
b. How can we work with the public to enhance the value of our services?
c. What are strategies and examples that we'd like to consider?
Polling Question #6

How was the webinar of value for you and your agency?
Register now for upcoming webinars

Effective Communication of Complex Issues to the Public
free webinar
9:00 a.m. - 10:30 a.m. Pacific Time (noon-1:30 p.m. ET), Thursday, Sept. 7

Strategies for Having Difficult Conversations
free webinar
10:00 a.m. - 11:30 a.m. Pacific Time (1-2:30 p.m. ET), Wednesday, Oct. 11

Tools to Resolve Tough Issues in Your Community
free webinar
10:00 a.m. - 11:30 a.m. Pacific Time (1-2:30 p.m. ET), Thursday, Nov. 9

Register for each webinar at http://icma.org/coachingwebinars.
ICMA
INTERNATIONAL CITY/COUNTY MANAGEMENT ASSOCIATION
### Polling Results from “Best Practices in Citizen-Customer Service” – webinar

**May 11, 2017**

563 locations; 1643 estimated participants in live audience

<table>
<thead>
<tr>
<th>Question</th>
<th>Options</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>How many people are listening on your line?</strong></td>
<td>65% 1 -- just myself</td>
<td>65%</td>
</tr>
<tr>
<td></td>
<td>24% 2-5</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td>8% 6-10</td>
<td>8%</td>
</tr>
<tr>
<td></td>
<td>3% 11-20</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td>2% 21 or more -- please send number using Question on webinar</td>
<td>2%</td>
</tr>
<tr>
<td><strong>In which ways would you like your agency to use social media?</strong></td>
<td>59% solve problems</td>
<td>59%</td>
</tr>
<tr>
<td></td>
<td>76% answer questions</td>
<td>76%</td>
</tr>
<tr>
<td></td>
<td>78% receive feedback</td>
<td>78%</td>
</tr>
<tr>
<td></td>
<td>83% build community</td>
<td>83%</td>
</tr>
<tr>
<td></td>
<td>5% not sure these tools fit our community</td>
<td>5%</td>
</tr>
<tr>
<td><strong>In which of these ways is your agency engaging citizens in service delivery?</strong></td>
<td>53% workshops</td>
<td>53%</td>
</tr>
<tr>
<td></td>
<td>53% online input or problem solving tools</td>
<td>53%</td>
</tr>
<tr>
<td></td>
<td>66% neighborhood meetings</td>
<td>66%</td>
</tr>
<tr>
<td></td>
<td>29% conscious strategy to collaborate, consult, or inform</td>
<td>29%</td>
</tr>
<tr>
<td></td>
<td>12% other (send via “Question” function)</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Which of the following would be desirable for your agency?</strong></td>
<td>42% some system (311, CRM, etc) to expedite service</td>
<td>42%</td>
</tr>
<tr>
<td></td>
<td>70% self-service options for public</td>
<td>70%</td>
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<tr>
<td></td>
<td>49% community information/leadership academy</td>
<td>49%</td>
</tr>
<tr>
<td></td>
<td>58% short conversations and pop up opportunities with public</td>
<td>58%</td>
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<tr>
<td></td>
<td>5% other (send via “Question” function)</td>
<td>5%</td>
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<tr>
<td><strong>How is your agency addressing needs bigger than it can address alone?</strong></td>
<td>48% creating a common agenda</td>
<td>48%</td>
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<tr>
<td></td>
<td>34% shared measurement of needs &amp; results</td>
<td>34%</td>
</tr>
<tr>
<td></td>
<td>34% mutually reinforcing activities-differentiated &amp; coordinated</td>
<td>34%</td>
</tr>
<tr>
<td></td>
<td>66% continuous communication-open, building trust</td>
<td>66%</td>
</tr>
<tr>
<td></td>
<td>29% backbone support-resources &amp; skill to convene &amp; coordinate</td>
<td>29%</td>
</tr>
<tr>
<td><strong>How was this webinar of value to you and your agency? (check all that apply)</strong></td>
<td>73% exploring approaches to improve service delivery</td>
<td>73%</td>
</tr>
<tr>
<td></td>
<td>60% offering concrete examples to consider</td>
<td>60%</td>
</tr>
<tr>
<td></td>
<td>58% providing sample toolkit, resources, etc.</td>
<td>58%</td>
</tr>
<tr>
<td></td>
<td>68% identifying models for engaging citizens to serve and solve</td>
<td>68%</td>
</tr>
<tr>
<td></td>
<td>64% takeaways that stimulate ideas for your agency and community</td>
<td>64%</td>
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</tbody>
</table>
As our growing community continues to diversify and change, the importance of public engagement is essential – and at the heart of our roles as public servants.

Quality public engagement depends on high levels of public trust and organizational competence.

Providing our City Council quality public input assists our elected leaders in making difficult decisions, and ensures community voices are heard on issues that affect them.

These decisions are made under the following conditions:

- Changing the course of existing policy
- Developing a new initiative or new service
- Responding to external events

The City of Issaquah engages with the public to:

- Identify community perspectives
- Shape effective public policy
- Inform community members on important issues and outcomes
- Address communitywide and neighborhood-specific concerns

Recognizing there’s no one way to conduct effective engagement, we’ve developed a flexible toolkit to suggest strategies and assist project managers in the development of customized engagement plans. Depending on the issue/topic, intended audience and available timeframe, this toolkit allows project managers to scale engagement efforts to fit the community’s needs and interests.

In addition, this toolkits sets a common language among departments, elected leaders and others as we strive to develop effective engagement programs. It aligns all of us – including City Council members and staff – around engagement expectations for a range of projects.

**OUR ENGAGEMENT PRINCIPLES**

- Deliver information on complex issues in a consistent and understandable format.
- Determine the right level of engagement with the right groups at the right time.
- Provide engagement opportunities early in the process.
- Train staff across all departments in effective engagement practices.
- Successfully communicate public perceptions and feedback to council.
- Identify interrelationships of projects and policies over time.

**FIVE STEPS TO ENGAGEMENT**

This toolkit outlines five steps you can take to ensure your project properly includes public engagement.

1. Assess readiness
2. Determine engagement level
3. Identify stakeholders
4. Select the right tools
5. Report and evaluate

INTRODUCTION
Before you start an engagement process – it’s time to assess if you are ready! Start by answering these questions. Before you move on to the next steps, be sure you can answer “yes” or “somewhat” to most of these questions to ensure your efforts will be effective.

<table>
<thead>
<tr>
<th>QUESTIONS</th>
<th>YES</th>
<th>SOMEWHAJT</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the issue/topic you need engagement on clearly defined? Is engagement being sought on all or nearly all aspects of the project, or only one or a few?</td>
<td></td>
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<tr>
<td>Is this issue/topic of high interest or importance within the community?</td>
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<tr>
<td>Will this issue/topic have a significant impact?</td>
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<tr>
<td>Is this issue/topic highly visible within the community?</td>
<td></td>
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<tr>
<td>Do you know who the ultimate decision maker is?</td>
<td></td>
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<tr>
<td>Have you identified a project lead for engagement?</td>
<td></td>
<td></td>
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<tr>
<td>Have you identified what success looks like (more participants, more diversity, ongoing communication, etc.)?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are there opportunities to combine outreach efforts on multiple issues/projects or repurpose data from previous engagement efforts?</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Do you know when engagement should be completed?</td>
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<td></td>
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<tr>
<td>Is there enough time for meaningful engagement?</td>
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<tr>
<td>Does the City have the resources to effectively support a public involvement process?</td>
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<tr>
<td>Is everyone participating in the process ready for meaningful public involvement?</td>
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<tr>
<td>Have you involved community partners, the City’s Communication’s Team, consultants and staff from other departments who will be involved in the process or affected by the outcomes?</td>
<td></td>
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</tbody>
</table>
There are three types of engagement, depending on the level of public feedback needed. Large-scale projects may travel through all three levels of engagement, starting with collaboration and ending with informing the community. In turn, the tools and audiences may also change throughout your project.

**COLLABORATE**
Collaborate with the community from the beginning of a project to develop alternatives and identify preferred options. This is co-creation at its best! These projects are often long-term and visionary. Examples include:
- Central Issaquah Plan
- Walk ‘n’ Roll Plan
- Aging in Issaquah

**CONSULT**
Consult with community members by educating them on a limited number of options or drafts, and asking for feedback. This option is best for projects that have already been informed via collaboration, or need engineering, design or other staff/consultant expertise to refine before engagement is effective. Please note: Some projects are first shaped by – or may be entirely the result of – code requirements, laws, engineering and public safety best practices that the City must follow. Examples include:
- Vote for your favorite playground design
- Build-a-road exercise
- Provide feedback on a proposed ordinance or agenda bill
- Provide feedback on the proposed budget
- Prioritize Capital Improvement Plan projects

**INFORM**
Inform community members about a decision that is already made. This one-way outreach "push" provides the public with objective information to increase awareness of a decision and its impact. Please note: Some projects are first shaped by – or may be entirely the result of – code requirements, laws, engineering and public safety best practices that the City must follow. Examples include:
- Certain types of infrastructure improvements
- Road closures
- Fee increases
- Changes in service
- Emergency information
Identify where your project fits best on this chart.

<table>
<thead>
<tr>
<th>DECISION MAKER</th>
<th>INFORM</th>
<th>CONSULT</th>
<th>COLLABORATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>STAFF</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAYOR’S OFFICE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CITY COUNCIL</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GO FOR IT!</th>
<th>CONSIDER IT</th>
<th>NOT TYPICALLY NEEDED</th>
</tr>
</thead>
</table>
Who should you engage with? Consider all types of community groups, neighborhoods and audiences. Identify stakeholders at the beginning of a project — and notify them of key decision points or opportunities to provide input. Stakeholders provide community expertise that enhances the engagement process. They can also help you reach more and broader networks. Here's a sample list to get you thinking – there are plenty of other community groups that could be added, depending on your project.

<table>
<thead>
<tr>
<th>GROUPS/AUDIENCES</th>
<th>ISSAQUAH-SPECIFIC EXAMPLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARTS/CULTURE</td>
<td>Village Theatre, artEAST, ArtWalk, Gas Station Blues, International Music Day, Concerts on the Green, Issaquah Philanthropic Orchestra, Issaquah Singers</td>
</tr>
<tr>
<td>BUSINESS</td>
<td>Greater Issaquah Chamber of Commerce, Downtown Issaquah Association, local businesses, large corporations, employers</td>
</tr>
<tr>
<td>FAITH ORGANIZATIONS</td>
<td>Issaquah Farmers Market, Meet the Mayor, Salmon Days, Fourth of July, Wine Walk, Concerts on the Green, National Night Out, Issaquah Library</td>
</tr>
<tr>
<td>COMMUNITY AT LARGE</td>
<td>Issaquah School District, individual schools, PTSAs, Issaquah Schools Foundation</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>City Council, boards, commissions, volunteers, other agencies (Issaquah School District, King County, Metro, Sound Transit, State, etc.)</td>
</tr>
<tr>
<td>GOVERNMENT</td>
<td>Issaquah Food &amp; Clothing Bank, Friends of Youth, Eastside Baby Corner, Catholic Community Services, Issaquah Community Services, AtWork!</td>
</tr>
<tr>
<td>HUMAN SERVICES</td>
<td>Issaquah/Sammamish Reporter, The Seattle Times, Puget Sound Business Journal, TV (KOMO, KING, KIRO, KCPQ), Connections newspaper</td>
</tr>
<tr>
<td>MEDIA</td>
<td>Cascade Bicycle Club, Eastside Easy Rider Collaborative, Getting Around Issaquah Together, pedestrians, cyclists, transit users, drivers</td>
</tr>
<tr>
<td>MOBILITY</td>
<td>Issaquah Highlands, Talus, Squak, Providence Point, Olde Town, Central Issaquah, Newport, Montreux, Greenwood Point, North Issaquah, Lakeside, Sycamore</td>
</tr>
<tr>
<td>NEIGHBORHOODS</td>
<td>Cultural Bridges for Education, Chinese Information &amp; Service Center, Issaquah Highlands cultural organizations</td>
</tr>
<tr>
<td>NON-ENGLISH SPEAKING</td>
<td>Friends of Lake Sammamish State Park, Issaquah History Museums, Friends of the Issaquah Salmon Hatchery</td>
</tr>
<tr>
<td>NONPROFITS</td>
<td>Issaquah Alps Trails Club, Evergreen Mountain Bike Alliance, Friends of Lake Sammamish State Park</td>
</tr>
<tr>
<td>OUTDOORS</td>
<td>Commercial brokers, real estate professionals</td>
</tr>
<tr>
<td>PROPERTY OWNERS</td>
<td>Issaquah School District, Issaquah Youth Advisory Board, Youth Center, Gibson Ek School</td>
</tr>
<tr>
<td>STUDENTS</td>
<td>Park and trail users, Parks and Recreation customers, Issaquah Soccer Club, Issaquah Lacrosse Club, Issaquah Little League, Issaquah Football Club</td>
</tr>
<tr>
<td>SENIORS</td>
<td>Issaquah Senior Center, Providence Point, Eastside Friends of Seniors, Timber Ridge, University House</td>
</tr>
</tbody>
</table>
QUESTIONS TO CONSIDER

Ask yourself - or even better, your team! - these questions to ensure you are reaching stakeholders.

- Who may be affected by this issue?

- Who can contribute to a solution that will meet the needs of a wide range of stakeholders and public audiences?

- Who can’t be left out?

- What other City departments should be involved?

- How does your project relate to others on which the City is currently conducting engagement?

- How should City Council members be involved?
Most engagement efforts will benefit from multiple strategies to inform, consult and collaborate with community. Be sure to leverage the City’s “inform” tools to get the word out about opportunities for residents to make their voices heard. Please check all that apply.

**COLLABORATE**
- Open City Hall (online engagement tool)
- Neighborhood meeting
- Focus groups
- Board/commission meetings
- Workshop
- Task force/committees (best for complex, long-range projects that need a group to study in-depth)

**CONSULT**
- Open City Hall (online engagement tool)
- Neighborhood meeting
- Leverage existing event (i.e. Concerts on the Green, Issaquah Farmers Market, etc.)
- Focus groups
- Telephone/mailed surveys
- Board/Commission meetings
- Open house

**INFORM**
- Website
- Issaquah Insider (eNews) article
- Social media (Facebook, Nextdoor, Twitter, etc.)
- Video
- E-blast subscriber list
- Personalized emails to stakeholders
- Phone calls
- Media notification
- Printed materials (handouts, letters, postcards, flyers, door hangers, banners, posters, etc.)
- Radio 1700 AM
- Variable message boards
- Podcast
- Signage/posters (onsite and throughout the community)
COMMUNITY EVENTS

✔ Checklist
Ready to host a community event? Here’s a quick checklist:

☐ Spread the word about your event! The City’s Communication Team is here to help. Ensure you provide enough lead time for staff and community members to plan ahead. Typically, at least a month of lead time is necessary in order to effectively get the word out through the City’s available platforms.

☐ Select a venue that will accommodate your audience. Venue ideas include:
  • Tibbetts Manor
  • Community Center
  • Blakely Hall
  • Pickering Barn
  • City Hall – Eagle Room
  • City Hall – Council Chambers
  • City parks
  • Issaquah Senior Center
  • Train Depot
  • Hailstone Feed Store
  • Gibson Hall

☐ Ensure you’ve included enough staff to help facilitate the event. To request trained facilitators, fill out this form on The Quah.

☐ Plan for what you’ll need. Support Services staff can also help with supplies; fill out this form on The Quah. Consider bringing:
  • Tables, chairs
  • Laptop, projector, screen
  • Sheets for attendees to sign in and sign up for future updates
  • Refreshments
  • Visual aides (posters, maps, PowerPoints, etc.)
  • Large format paper and pens
  • Easels
  • Comment cards, ballpoint pens
  • Nametags
  • “What’s Next” explanation

☐ Always provide comment cards for those who prefer to provide written input. If a community member wants to provide input later, ensure project contact information is available and/or offer a meeting with key staff.

☐ Ensure you have a plan for following-up with participants.
CONVENIENT TIMES, LOCATIONS AND ACCESSIBILITY
Whenever possible, public meetings — including workshops, neighborhood meetings and open houses and other events — should be held in facilities that are accessible to persons with disabilities and/or to people who rely on public transportation. In addition to hosting meetings at convenient locations, consider various times during the week or weekend to accommodate all community members.

TYPES OF MEETINGS
There are several options for organizing a community event to leverage engagement. Typical formats include:

WORKSHOP
- Best for collaborating with community members.
- Starts with a presentation from staff or a consultant.
- Participants break into smaller groups to discuss, brainstorm and develop ideas on key questions/issues (ensure there are enough facilitators to assist each group).
- Groups reconvene to share ideas.
- Staff takes detailed notes during the report-outs.

NEIGHBORHOOD MEETING
- Best for collaborating or consulting with community members.
- Staff travels to a neighborhood location, instead of inviting participants to City Hall.
- Starts with a presentation (oftentimes specific to that neighborhood), followed by facilitated discussion.
- Staff take detailed notes to facilitate follow-ups.

LEVERAGE EXISTING EVENTS
- Best for consulting with community members.
- Host a City booth or table at an existing event.
- Staff are available to explain visuals, and guide participants through the engagement process (filling out comment cards, completing a survey, etc).
- Works best when staff have conceptual plans/ideas to present and receive feedback on.

OPEN HOUSE
- Best for consulting with community members.
- Staff are available at informational stations (instead of delivering formal presentations) that present conceptual plans/ideas.
- Notes are taken on large format paper so participants can see that their feedback was heard.
- Staff take detailed notes to facilitate follow-ups.
- Can feature interactive exercises (example: “build a road”).

SELECT THE RIGHT TOOLS
Open City Hall is Issaquah’s online community engagement tool, which enables the City to reach more community members than in-person meetings alone.

The tool, which offers a variety of tools to collect feedback (surveys, polls, maps, build-a-budget) and analyze results (demographics, common themes, responses by neighborhood).

For easier analysis and reporting afterwards, materials presented online – along with feedback requested – should mirror in-person engagement efforts.

Learn more by visiting the City’s tool, or request a full demo from the City’s Communications Team.

**WHAT TO CONSIDER BEFORE ENGAGEMENT**

**CONTACT INFORMATION**

No matter the tools you use, ensure you collect contact information from those you are engaging with. This way, you can update them on your project progress along the way, and inform them when a decision is made.

**TELL THE STORY**

Also, when possible, explain your full engagement process to those you are communicating with. This ensures community members know what’s already happened, and what the next steps are.
In order to identify issues, measure success and adjust plans accordingly, it’s important to monitor and evaluate your project throughout the entire process.

Once you’ve conducted engagement for your project, now is the time to use it! Ensure you share your engagement process – and results – with:

- Those who provided input (use the contact information you collected during the engagement process to close the loop).
- The larger community (using the City’s “inform” tools).
- The decision makers. For large-scale projects – especially those that include collaboration (and sometimes consulting) – provide your results via agenda bills and/or committee or full council presentations. When possible, package the actual feedback for council members to review, and be sure to provide a recap.

It’s important to note that effective engagement can draw out competing values and doesn’t always provide clear consensus.

Afterwards, take time to evaluate and reflect on your engagement process. Find ways to ask your participants for feedback on the engagement process itself. Ideas include asking the question at the end of a public meeting, via email or in an online survey.

**QUESTIONS TO CONSIDER**

- Was my engagement topic clearly defined?
- Did I make adequate efforts to engage those most affected by the project?
- Was my project successful? Why or why not?
- Was the project delivered on time?
- What was the feedback from community members?
- What was the feedback from the decision makers?
- Was there enough time allotted for meaningful engagement?
- What other resources did I need?
- Do the tools and/or activities achieve inclusive engagement?
- What should I plan for next time?
- Who else should I have partnered with?
The following engagement toolkits served as valuable resources, and were often incorporated into this customized version for the City of Issaquah.

- City of Waterloo, Ontario, Canada: "Public Involvement: Guidelines, tools and worksheets for successful community engagement"
- City of San Luis Obispo, California: "Public Engagement and Noticing Manual"
- Oregon Metro: "Public Engagement Guide"
- City of Seattle, Washington: "Inclusive Outreach and Public Engagement Guide"