



# Defining Your Digital Engagement Toolset



In developing the features and functionality of Civil Space, we worked alongside City Planners, Public Engagement Advisors, and Senior Strategists from municipalities large and small. We collaboratively defined a list of pressing needs common to public engagements, gaps in digital tooling, and the must-ask questions that sit with municipal review boards and engagement planning checklists.

**We've designed our platform from insights like these, and now it's time to share.**

We've compiled a summary of our learnings from municipalities, engagement firms, and nonprofit organizations, to give you *Civil Space's Guide to Defining Your Digital Engagement Toolset*. **In it**, we walk you through the three key areas that our civic partners identified as core to a successful digital engagement toolset, and how a platform like Civil Space fits into the toolbox.



# Your Engagement Scope

Truly inclusive engagements provide the richest results: high participation from all members of the community who are interested and impacted by the decisions at hand.

Before you can identify the solution, you need to have an articulation of the problem. The answers to these prompts will help establish the goals of what effective online public engagement looks like for your organization, and what factors you'll need to consider in ensuring that your toolset will support a meaningful engagement between your organization and your citizens.

Goals	What does success look like?
	What are the Key Performance Indicators or Metrics?
Audience	What do you know about the audience you're trying to engage?
Message	What type of content and context do your engagements need to provide?
Key Stakeholders	Who in the organization needs to be involved in this decision? Consider a RACI matrix.
Timeline	Are there any external milestones driving a deadline?
	Is anything at risk if the project takes longer?
	Can you launch an early iteration and continue to improve, or does it need to be seamlessly presented?
Budget	How much does the organization stand to save in labour hours, and gain in meaningful input?
	Do you have any creative budget sources?
Project Context	Is this the first time this has been explored, or is there any relevant background to share?



## Your Engagement Audience

In defining the toolset you need to run engagements that facilitate intentional two-way conversation, you'll need to understand your audience at a deep level.

You'll want to consider a statistically-relevant, graphically-represented survey to ensure you gather the most accurate data before making an investment in change. The main information that you want to collect will be your audience's preferences for engagement, out of a list of options that you are considering undertaking, such as online, town halls and at events. You'll also want to ask what they need to make informed decisions (images, videos, maps, etc.), and what channels they prefer to receive their information (direct mail, email, social media, etc.).

Other information that you may want to collect so that you can analyze your data by demographic segments include age group, language, family structure, and citizenship. This knowledge will prove invaluable in identifying the features that will be impactful in your digital engagements.

# Your Engagement Toolset

The true utility of a digital engagement toolset is defined by the areas you've just assessed. While each municipality, organization, and institution will have specific needs, outcomes, and functionality, there are common threads and flexible features that can address many types of requirements that come out of these assessments.

Area	Context	Functionality to Consider
Goals	Knowing the goals of your engagement, you can examine whether toolsets offer the type of deliverables, consensus-building methods, and IAP2 Spectrum intentionality needed.	<ul style="list-style-type: none"> <li>• Reporting formats</li> <li>• Conversation-generation</li> <li>• Context sharing</li> </ul>
Audience	Having first defined and then explored the audience for your forthcoming engagement, you can assess what forms of contact, outreach, information sharing, visualization, feedback mechanisms, and conversational capacity you'll require from your toolset.	<ul style="list-style-type: none"> <li>• Responsiveness</li> <li>• Sharing methodologies</li> <li>• Data visualization capabilities</li> <li>• Toxicity-filtering</li> <li>• Commenting</li> <li>• Moderation</li> </ul>
Message	Recognizing that meaningful engagements are fueled by context-setting, your exploration of how information can best be shared and received will play a vital role in defining the functionality your digital engagement will need.	<ul style="list-style-type: none"> <li>• Embedded media formats</li> <li>• Design &amp; presentation functionality</li> </ul>
Key Stakeholders	Understanding the members of your team and the roles they will play in building, facilitating, and managing the forthcoming engagement will allow you to identify toolset roles, permissions, and administrative functionality that will suit your workflow and outcomes.	<ul style="list-style-type: none"> <li>• Product roles (e.g. Admin, Builder)</li> <li>• Public gateways (open access or gated content?)</li> <li>• Engagement management (how are engagements sorted and defined?)</li> </ul>
Timeline	The length of time within which your engagement will extend to collect, synthesize, and report information will impact the type, depth, and breadth of digital engagement functionality you need. Will your engagement occur across multiple phases, with specific forms of conversation and feedback needed in each?	<ul style="list-style-type: none"> <li>• Engagement hierarchies (how do engagements show up within a greater Project?)</li> <li>• How is data collected and shared across engagements internally, and publicly?</li> </ul>
Budget	Understanding the parameters of your budget can make all the difference between enlisting a toolset for a single engagement on a one-time license, or incorporating a new platform for continued engagements and larger projects with multiple users.	<ul style="list-style-type: none"> <li>• Do your toolsets require licenses per user, per engagement, or per platform?</li> </ul>
Project Context	Addressing whether your audiences and stakeholders have already been connected with your engagement content and topics plays a key role in defining how your toolset will present and share information.	<ul style="list-style-type: none"> <li>• Embedded media</li> <li>• Linking capabilities</li> <li>• Integration into other platforms</li> </ul>

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