



# INCLUSIVE ENGAGEMENT TOOLKIT



# What is CCQOL?

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Community Consultation for Quality of Life (CCQOL) is a major research project funded by the Arts and Humanities Research Council to develop a new, map-based model of community consultation that takes place both online and face-to-face across the UK.

This toolkit is just one of a number of reports that will culminate in a Code of Conduct for Community Engagement. For more information visit:

[www.ccqol.org](http://www.ccqol.org)

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## Acknowledgements

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# About the Inclusive Engagement Toolkit

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## What is the Inclusive Engagement Toolkit?

The Inclusive Engagement Toolkit is a handy resource that outlines the key steps and principles to enable and encourage equal access to opportunities and resources during consultation and engagement processes for planning.

The toolkit was created for Community Consultation for Quality of Life (CCQOL), which aims to improve the way consultation and engagement happens across the UK.

## Who is this toolkit for?

This toolkit is for anyone interested in undertaking or participating in an inclusive engagement process. This includes community groups, individuals and built environment professionals. It is also for companies or institutions that develop or shape new places, such as local authorities, resident associations, charities and developers.

Whilst this toolkit presents many universal and transferable principles, it displays guidance on face-to-face engagement instead of digital.

## How does the toolkit work?

The inclusion toolkit offers seven simple and easy to use steps for undertaking inclusive community consultation for planning.

## Why is it important?

Inclusion is central to the delivery of a democratic planning system. Research shows that if people have a greater influence over their environment, it can improve their sense of wellbeing and can contribute to health and resilience. Inclusion is important for creating places that work well for as many people as possible.

## A note on language

Whilst this project is part of Community 'Consultation' for Quality of Life, the term of 'engagement' is used throughout this toolkit. This describes a broader and ongoing process of sharing information with the community and seeking its feedback to get the community involved in the process of decision making as opposed to a formal consultation process to meet legal requirements.

## Who should we include in engagement?

- We should be inclusive of all people, ensuring that we engage with a demographic representation of the people who will be affected in the area. We should also pay particular attention to those with legally protected characteristics.
- Protected characteristics are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation, as defined by the Equality and Human Rights Convention.

# Steps to Inclusion

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This section summarises and describes the seven simple and easy-to-use steps for undertaking inclusive community engagement for planning. The stages will support you throughout the process, from the start to the end.



# UNDERSTAND





# Steps to Inclusion

## 1. UNDERSTAND

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This stage is arguably the most crucial, and will form the basis of your successful inclusive engagement.

This stage is important to first understand the purpose of your consultation and the scope for making change. You should also gain an understanding of who the affected community (or communities) are and what their demographic make up is, as well as any challenges they may face and sensitivities that need to be considered when designing an inclusive engagement plan.

This is the time to understand and map the existing community with a detailed view of the types of people who live and work in the area. You will need to ensure that any activities and events cater for and target the population so that you can engage with a representative group of people.

This stage also allows us to understand and identify any potential barriers that need to be overcome, such as language, literacy, technical capacity, financial and social conformity, for example.

### Developing a level of community understanding

The following shares key ways of creating a good level of understanding:

#### UNDERSTANDING THE AFFECTED COMMUNITY

This is where you'll need to understand which community will be affected by the project in question. This may be a particular neighbourhood where you'll discuss new future neighbourhood plans or a street if street-based improvements are in question. The community and area could be a statutory requirement that outlines an official area such as a postcode range, street residents or neighbourhood ward boundaries for you to engage and finally consult with.

It is important at the outset to manage expectations by ensuring that those you ask can contribute to a change that is meaningful to them.

# Steps to Inclusion

## 1. UNDERSTAND

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### UNDERSTANDING THE COMMUNITY MAKE-UP

This is where you will uncover a detailed understanding of the community demographic and mix. It will include your understanding of the community population's age, sex, disability, race, sexuality, religion, sexual orientation, language, and household characteristics. It should also include geographic locations, health, and socio-economic status. Census data "Lower-layer Super Output Areas" (LSOAs) and local authority websites often house this information.

Follow the steps below to understand the targeted community and area comprehensively.

#### Create a list:

- Find and record the key community leaders and influencers within the area. This could include youth workers, pastors and well-connected or popular community members, alongside representative groups. Pay particular attention to groups that may be 'under-served.'
- Record their respective contact information, websites, member types and number, communication and digital and physical outreach methods, events and activities, location and influence. Develop this list of contacts and information while respecting rules of GDPR.

Understanding how groups digitally and physically communicate with their members may later enable you to piggyback their social media activity and channels, for example. Understanding where key community hubs and buildings are located will also provide a host of locations and portal of activities and events to join too.

#### Find the gaps:

- Compare the above community list with the community make-up and demographic information to ensure there is a representative group or institution for all of types of people in the area. Highlight the gaps and use this information to pay extra attention to find out how to reach those people via targeted outreach or activity. You may need to pay particular attention to reaching transient people, such as refugees. Use gaps such as these to develop a strategy that ensures that their needs are met.





# Steps to Inclusion

## 1. UNDERSTAND

### CARRY OUT EARLY ENGAGEMENT

**Conduct early engagement:** Work with stakeholders to carry out early engagement. Ahead of doing this it's important to develop an ethical strategy to ensure no misrepresentation of communities (see Social Value Toolkit for Architecture for further guidance on this).

Early engagement may take the form of interviews, workshops or street conversations which isn't always easy, particularly if new to the area. Working with a client such as a local authority may help to signpost you towards a critical player or group to do this with.

The following are additional areas of data that you may be able to gather in this process:



#### LOCAL INTELLIGENCE

Understanding any existing social tensions that may affect any engagement exercises.

#### GAP FILLING

Knowing how to mitigate gaps within the stakeholder list via introductions to relevant connected groups or individuals.

#### THE UNDER-SERVED

Understanding who the under-served are and any known barriers they may have to participate, or steps that haven't been taken to reach them.

#### EARLY INSIGHTS

General thoughts on the engagement topic and the capacity of stakeholders and target groups.

#### OPPORTUNITIES & POTENTIAL BARRIERS

Examples may include but are not limited to some or a combination of the below.

#### PREVIOUS ENGAGEMENT EXPERIENCE

May include engagement fatigue, historical exclusion of particular groups, social tensions, political affiliation and issues of trust.

#### PERCEPTION

Mistrust, perceived lack of welcome or confidence to engage.

#### FORMAT

Technology, literacy, time, affordability, culture, ability.

This information can all be used later in planning events. You can use it to develop a programme that suits the local context and mitigate any issues. Early conversations are not only an opportunity to fact-find but also a launch pad for relationship building.

# STRATEGISE



# Steps to Inclusion

## 2. STRATEGISE

This stage uses all the information you've gained from the 'Understand' stage to create a plan designed to cater for and respond to the people and places of the target area.

It will be an inclusive plan that makes every effort to reach a wide range of people through a mix of relevant and engaging activities and events.

You may achieve this by piggybacking on popular activities, or by running focused events.

Holding events at various times and on different days will help to attract a broad group of people to participate. Where resourcing is limited, it will be important to prioritise areas to focus on and work with the community to support the process if appropriate.

### Create a plan for engagement

Using the information you've gained from the 'Understand' stage, create a plan to reach all parts of the community, from teenagers to older people, and from all faith groups and physical abilities.

This plan should include activities, events and targeted communication described in more detail below.

Your engagement plan should set out, but not be limited to:

- The target groups
- The events and activities
- The hosts
- The days and times
- Locations
- The communication used to advertise and promote
- Ethics and use of filming and photography.

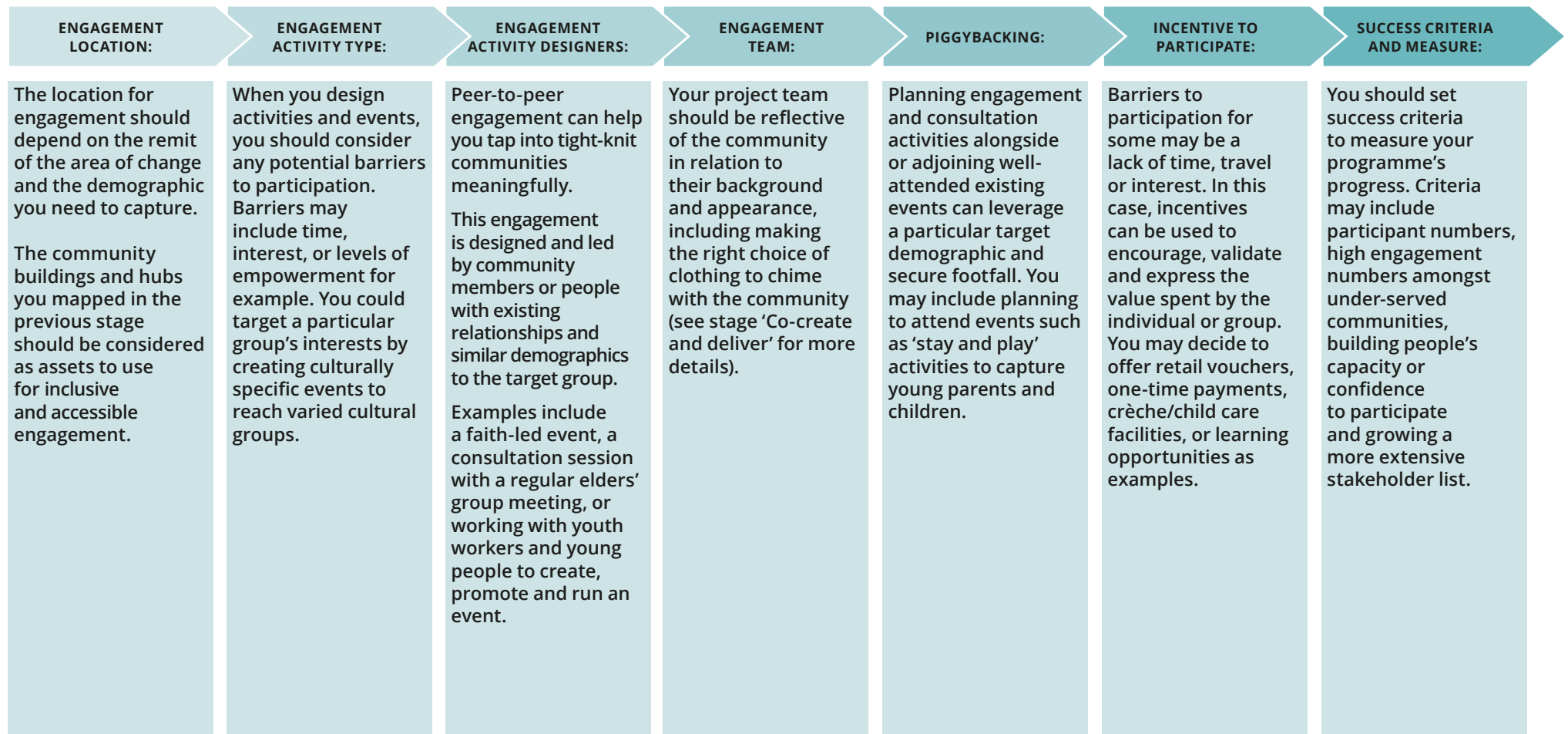


# Steps to Inclusion

## 2. STRATEGISE

### ENGAGEMENT PLAN PRINCIPLES

Refer to the below considerations as you create your engagement plan.



REACH OUT



# Steps to Inclusion

## 3. REACH OUT

You will reach out to communities and stakeholders at this stage, inviting them to participate and engage in your process. This outreach should be both bespoke and generic enough to appeal to all aspects of the community, with targeted methods used where needed.

This stage is not only about the material you share but also about how you share it. This could be through targeted social media posts or via trusted word-of-mouth communication for example. Successful outreach will include an array of media types to meet the needs of the area, communities and stakeholders.

Reaching out is essential in creating an inclusive process. Without this stage, engagement activities may continue unheard and unseen, resulting in low turnouts and a room filled with the 'usual suspects' (those who can always be found at consultation and engagement events and those who have the time and entitlement to make a change).

A clear outreach strategy is likely to give you more control over the output and success of the programme.

Reaching out includes a combination of choosing suitable messaging, the right media and channels to meet the target groups and demographic.





## Steps to Inclusion

### 3. REACH OUT

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#### PRINCIPLES TO GUIDE 'REACHING OUT'

Follow the below principles for an effective process of reaching out.

**Media type:** Use various communication methods to connect with the diverse target communities and stakeholders. Options could include digital means like an email newsletter, social media, and use of a project website, and physical methods such as flyers and posters, telephone number hotlines and mobile phone messaging services. Targeted or promoted social media posts can help specifically target a particular group.

**Promotion:** Define multi-media outreach, including working with other community groups and council media as examples.





**Clear messaging:** Communicate the purpose and set objectives in clear, understandable language, with crucial information and a call to action or direction towards participation options. You should also ensure that your messaging is appealing and inclusive, by aligning the language with the media type. For example, social media should be short and snappy, whilst flyers may need to be more descriptive.

**Appropriate communication:** Your communication's format, size, language and style should be tailored to the user and be jargon-free. This will help you communicate clearly, engaging across different capacities, interests, abilities, and needs.

Language should also address multilingualism by providing translations or options to obtain it.

Messaging and media should be non-triggering by being aware of the inappropriate use of cultural symbols, stereotypes, and unreadable colour palettes (being aware of colour blindness, partial sightedness and neurodiversity). The above recommendations are inclusive of both digital website design and written products. Options of language, text size, braille and other options should be made available on request.

**Transparent:** It's essential to communicate during this stage and throughout the process, the remit, areas and aspects that can and cannot be changed through your engagement process.



CO-DESIGN

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# Steps to Inclusion

## 4. CO-DESIGN

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At this stage, you will finalise the design of your events, surveys and spaces.

It will be the stage where colours, sounds, imagery and areas such as break-out spaces are decided on. It's also the point at which your place is designed to look, feel and become welcoming and not hostile.

This stage will ideally include an element of co-design or testing by particular groups from protected characteristics to highlight any barriers and suggest adaptations ahead of the official launch. Examples include using specific colours and lighting to create a safe environment for neurodiverse visitors and ensuring venues are truly accessible.

### DESIGN PRINCIPLES

Follow the below principles to facilitate the co-design process.

#### Co-design a programme of events:

While creating welcoming and inclusive events for all, you should also focus on stakeholder target groups. In doing so, pay particular attention to under-served communities, ideally working with people from those groups to design the final programme of events.

#### Co-define resource programme:

Work with community groups and community leaders to form community champions and community curators for the engagement programme. These may include both voluntary and paid members of staff.

**Co-define targeted topics:** Decide on questions, scripts and a skill-exchange programme to help share skills if needed to build participation confidence or social value. You may discuss how topics are translated into clear, easy-to-understand materials and in the right kind of language for the targeted community.



# CO-CREATE & DELIVER



# Steps to Inclusion

## 5. CO-CREATE AND DELIVER

Creating and delivering the engagement programme is what this stage entails. It includes the use of a diverse and relatable team, trained to be welcoming, inclusive, supportive and able to act as key sources of information. The creation and delivery of the engagement and consultation programme in this stage is the culmination and realisation of the detailed and considered engagement plan and where true inclusion is manifested. Follow and consider the below principles when creating and delivering your engagement programme.

### CREATE AN INCLUSIVE TEAM

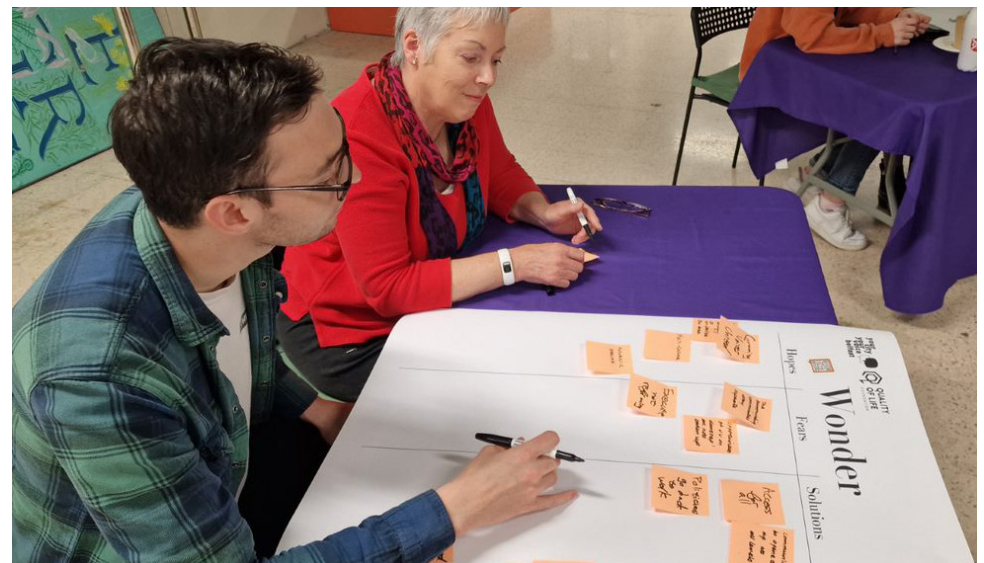
An engagement team should be selected and trained to be inclusive in various ways, as described below.

**Knowledgeable and clear:** The team will need a sufficient understanding of the purpose and the request of the people they engage with. The team will need to be able to ask the right questions in the right ways to achieve the purpose. This clarity of questioning is critical to ensure that expectations are managed and that clear and precise information is shared.

**Welcoming and appropriately behaved:** Your engagement team must be given guidance on how to approach people in a welcoming manner. This may include giving visitors and the community a choice to participate whilst not being too authoritative in their style.

A minimum of two team members is recommended to run a space for safety reasons, whilst providing the space for some visitors who may want the opportunity just to chat.

Acting appropriately may be defined as using clear language, addressing those with disabilities with care and respect, understanding cultural norms and so on. It may also be worth considering the choice of clothing to ensure that the team chime well with the community.



**Culturally aware:** Recognising and adapting to cultural differences - this may include understanding when handshaking may not be appropriate, the need for gendered spaces, and not referring to stereotypes. It may also include the use of a translator.

**Representative:** Demographic representation amongst the team members themselves has been seen to increase participation and provide a connection with key groups. Representation may include gender, ethnicity and ability, allowing them to relate to different parts of the community. A diverse and representative team can be a great way of informally inviting different types of people to engage, giving community members a range of people to talk to, including those that are more relatable.

**Follow ethical practices:** Ethical practice is an important consideration that should be adhered to and communicated with those participating in engagement. Aspects should include letting people know what they are signing up for and ensuring informed consent is gained. This may include photography and overall use of the information used in the programme.

**Ethical policy:** Prepare clear statements on how data will be used and stored, and for how long, so people can feel confident that they and their information will not be exploited. It is important that people understand that they are giving their consent to get involved. Parental consent may be needed when working with young people.



# Steps to Inclusion

## 5. CO-CREATE AND DELIVER

### CREATE AN INCLUSIVE ENVIRONMENT

Material, communications and call-outs must all be inclusive, and so to must be your physical environment. If it isn't, all efforts to reach the community will be limited or wasted.

The environment you create needs to be welcoming both from a distance, at the entrance door and throughout the space. Large welcome signs, open doorways and approachable staff are all critical elements to creating this.



The following should be considered to create an inclusive space:

**Welcoming, warm and open** - this can be achieved via open doors or windows, visibility, staff presence and immediate approach, welcome signage

**Accessible** - any space used should be accessible to wheelchair users and for disabled people as well as those using push chairs, amongst others.

**Appropriate** - use appropriate tools, information and spaces for different groups by identifying and mitigating risks for those who are vulnerable. This may include the use of women's only groups and spaces.

**Clear** - your engagement message should be located in an area that is easy to see, hear, feel and understand. Participation options should be clearly articulated, whether it's through play, a survey or a mapping exercise.

**Easy to navigate** - examples can include a space with a clear directional route around the room, particularly useful to those who may be neurodiverse. The majority of people can easily interpret arrows, regardless of language or their literacy levels.

**Flexible** - providing a variety of ways to engage. This may include having a more calming and controlled space for differing needs. The area should be adaptable, to be able to respond to user needs and change throughout the engagement programme.

**Choice of interaction** - you should include different options for participation. For example you could offer an ability to comment or simply view information via multiple formats, maybe including text, drawing, video, sound, conversation, children's toy areas, maps, screens, or digital means.

**Comfortable:** providing a range of seating types, heights, and upright chairs as well as bean bags, for example. A comfortable environment is aware of neurodivergent needs and doesn't include harsh and strong lighting or too much information on display.

**Display inclusive material:** Ensure that your material is located in an area that is clear, and at different levels to meet different eye heights. The text should be printed large enough to be read by all. The text should also be located alongside a visual representation and audio option. QR codes alongside telephone numbers are also an option that should be considered.



# RECORD & ADAPT



# Steps to Inclusion

## 6. RECORD AND ADAPT

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You should monitor the level of inclusion throughout the engagement process, which may include recording the number, type and frequency of participants, alongside the participant experience of the process.

By recording this data, you can make adaptations during the process to increase participation and improve the results. Actions and adaptations may include adding clearer signage, increasing promotion through different means, or a change in environment layouts to create safe places for all users. Your recorded information may include the following:

**Physical engagement data:** the numbers and demographics of people reached, participated and signed-up for more information where appropriate. This may also include monitoring daily use of the space alongside formal participation and input. Daily use monitoring can be recorded via surveys, interviews and observation.

**Relationship building:** public trust of authorities and change makers is often low, so the relationship-building process to develop trust and 'buy-in' throughout the engagement process is just as important as the recorded numbers. Community and personal faith and relationship growth can be recorded on the stakeholder map and gained via surveys, anecdotal recordings, and testimonials.

**Confidence to participate:** Skill building can be a valuable tool to ensure communities can participate meaningfully. This can be achieved via peer-to-peer engagement using community representatives to impart and share knowledge. The knowledge building and exchange can also be recorded via surveys and observation.

**Peripheral benefits:** Identifying the secondary benefits beyond direct engagement may include confidence building, the development of neighbourhood pride and a sense of belonging. Research has suggested that there are several psychological benefits of cooperative placemaking<sup>1</sup>. Any benefits observed and recorded should be used to help others understand the broader benefits of engagement and participation.

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<sup>1</sup> The Psychological Benefits of Cooperative Placemaking Published by Taylor & Francis - International Journal of Co-Creation in Design & the Arts





# CONTINUE THE CONVERSATION



# Steps to Inclusion

## 7. CONTINUE THE CONVERSATION

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Feedback to the community is vital to communicate how engagement input and insights have been listened to in order to affect change.

Without this stage, the process of inclusion is not only pointless but detrimental. It is damaging not only to the project but to future engagement exercises. People can feel ignored if they don't see or understand whether any meaningful change has happened as a result of their input. Instead, they may feel used and fatigued and less likely to engage in a similar processes actively. This is how mistrust continues around engagement exercises.

If feedback is successful, it's an opportunity to continue the conversation, maintain and develop relationships and enable a sense of shared pride.

### PROVIDING MEANINGFUL FEEDBACK

Feedback can be carried out in many ways, from the use of the outreach channels that include a physical mail-out and social media, updates on a project website, via physical means such as flyers and posters or phone calling and mobile phone messaging. You may create a 'celebration' consultation event or programme, inviting participants to see the outcomes of the proposals that their input has informed.

This feedback stage is also essential to record and share lessons learnt from the process. Doing it helps ensure that engagement processes evolve and learn from one another.

### ENGAGEMENT NEXT STEPS AND LEGACY

This step is often hard to define, but an excellent opportunity to build upon relationships created throughout the engagement process. As engagement is a long-term process, it's worth considering how a legacy can continue beyond a project or task.

Examples may include setting up a steering group that can act as a task force to build upon some of the projects identified for an area. It could also be an opportunity to share timelines and maintain updates with the participants over time. There are many ways to create a legacy and decisions should be bespoke to the projects and communities.



# THE 'HARD-TO-REACH'



# What about the 'hard-to-reach'?

Engaging with people who are often excluded or marginalised.

Over the last few years, there has been a sharpened awareness and understanding of particular communities or individuals excluded from engagement and participation processes and subsequently described as the 'hard-to-reach'. Several factors make this term problematic.

## 1. IS IT TRUE THAT A MINORITY GROUP OF PEOPLE ARE THE ONES LEFT OUT OF THE PROCESS?

Not necessarily. There is evidence to suggest the opposite, where those who oppose new development tend to be owner-occupiers, live in villages, are over the age of 45, come from a two adult and children household - or are retired\*. Just 5% of completed neighbourhood plans are in urban areas, with only 6.7% of neighbourhood planning areas in places classified as most deprived.

So the evidence suggests that most of the population has been 'left out', including the large numbers of people under 45 years old and are renting, and those in urban environments. The term 'hard-to-reach' also places the responsibility on the groups instead of the authorities.

## 2. IS THE TERM 'HARD-TO-REACH DEROGATORY'?

Yes, to some, with preferred words ranging from those who are 'under-served', 'marginalised' or 'under-represented' amongst others. However, labelling such a large group is most likely to be where the problem lies.

## 3. WHAT SHOULD WE SAY AND DO INSTEAD?

The safest bet is to veer away from labels; engagement as its core mission should be inclusive with measures in place to reach everyone instead of labelling a select group of people. However, it's essential to recognise that certain groups or individuals have historically been less involved in participation and communication. Hence, it's critical to understand any barriers or shortcomings of the process to overcome this.



\*British Social Attitudes Survey 2018 and Civic Voice's 2019 online survey.

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