

Public Engagement Workbook

A practical guide for City staff to plan and deliver effective public engagement.

Ottawa is built on un-ceded Anishinabe Algonquin territory.

The peoples of the Anishinabe Algonquin Nation have lived on this territory for millennia. Their culture and presence have nurtured and continue to nurture this land.

The City of Ottawa honours the peoples and land of the Anishinabe Algonquin Nation.

The City of Ottawa honours all First Nations, Inuit and Métis peoples and their valuable past and present contributions to this land.

Odàwàng kì ombàkonigàde ega wìkàd kà mìgiwàniwang Màmìwininì Aishinàbe-wakì.

Pimàdizìg Màmìwininì Anishinàbeg kàgìgekamìg kì abìg ondaje àking.

Odanishinàbewiziwiniwà obimàdjiwowiniwà ogì nanegàdjichigàdànàwà nanàj ako nongom iyo abinàs.

Kichi Odenaw Odàwàng okikàdjìyàwàn pimàdizìn Màmìwininì Anishinàben kaye okikàdjìtònàwà iyo àkì.

Purpose

This workbook supports your public engagement project from start to finish. Created by Public Information and Media Relations for City staff, it provides tools to help plan, deliver, and evaluate your initiative.

Public engagement practitioners are encouraged to follow the plan outlined below to help guide your public engagement project and strengthen its impact.

This workbook contains seven important sections that will help support a successful and meaningful engagement:

- [Section 1: Project Scoping](#)
- [Section 2: Design](#)
- [Section 3: Communications & Promotion](#)

- [Section 4: Implementation](#)
- [Section 5: Completion & Analysis](#)
- [Section 6: Reflection & Evaluation](#)
- [Section 7: Maintain Relationships](#)

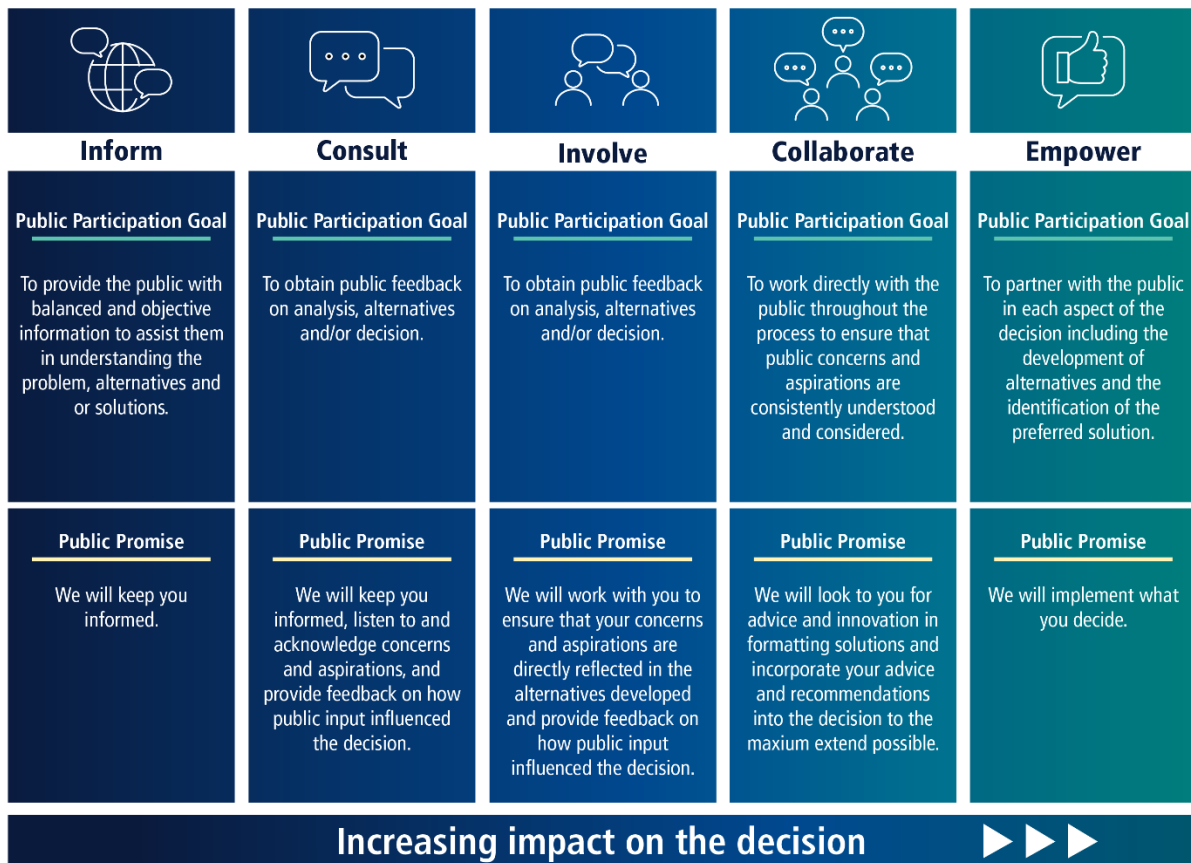
Section 1: Project Scoping

Why is this engagement happening?

It's important to be clear on why the engagement is happening in the first place. Answer the following:

Clarify the purpose:

Question	Answer
Who asked for this engagement/what triggered it? Consider: is there a legislative obligation to consult, as outlined in the IASR of the AODA (Duty to Consult)?	
What are you looking to get out of this engagement?	
Why is this engagement important?	
How will this feedback influence the decision making?	
What is the scale of the engagement?	
Determine the spectrum of engagement. Use the table below to help decide.	



Public engagement spectrum

Project Summary

This section is to help determine what the project is and what the goal is. Below, write out what your project is: include the reason the project needs engagement, the general timeline for the project, and how the public can participate.

Reason for Engagement:

What are the goals and what are we trying to achieve? Clearly outline how feedback will influence the final outcomes or decisions. Specify which aspects of the project are open to change based on participant input, and transparently explain any constraints or fixed elements where feedback cannot be incorporated.

Timeline:

Plan to engage early in the process to allow enough time to gather, review, reach out to

equity-deserving communities, determine accessibility requirements, and analyze feedback before key decisions are made. Ensure the schedule builds in space for reflection and integration of participant input.

Step	Description
Project	2–3 sentence overview
Reason for Engagement	1–2 sentences
Timeline Note: Check the cross-departmental calendar and the Equity, Diversity, Inclusion and Belonging (EDIB) Calendar to consider collaboration and avoid overlap	Key milestones
Call to Action	How people can get involved

Note: Be clear about what is up for discussion and what is not. For example, “Play structure design is open for input; walking path is not.”

Objectives and Key Results

Building on what you just wrote, what are some objectives you have with your public engagement initiative? What are you hoping to get from residents? Please consider the context of your project when determining this. Your project may be smaller in scope, and as such may not get as much participation by numbers but may benefit from an increase in representation from specific communities. Please edit and expand this section as you see fit.

Your responses determine whether engagement is meaningful rather than simply a checkbox exercise, engage only when input can influence decisions. If flexibility is limited, focus on informing rather than consulting; if full flexibility exists, plan for genuine collaboration and clear communication of how input will shape outcomes.

Identify the objectives and key results of your public engagement initiative. To establish these, consider the following:

- What are we trying to achieve?
- What input or outcomes are you hoping to gain from residents?
- What flexibility does your project have to integrate this input?

OKRs	Explanation	Notes
Objective		

Key Result 1		
Key Result 2		

IMPORTANT NOTE: Even if your project is small, meaningful engagement is about reaching the right people, listening actively, and ensuring that their input has a visible impact on the final outcome.

Roles and Responsibilities

Your public engagement project may involve multiple staff who each have a different role to play in the experience. We have included an example overview of different roles that a public engagement project may have. Note that some staff may play multiple roles, and in the event of small-scale engagements, one employee may take the lead for most parts.

Consider key experts and advisors with [Equity, Diversity, Inclusion and Indigenous Relations](#), [Finance and Corporate Services](#), [Accessibility Office](#), community groups, or experience on similar projects.

Determine who will be responsible for key roles associated with your engagement:

Role	Responsibility	Assigned Staff
Project Lead	Oversees engagement and alignment with broader project	
Project Sponsor	Provides approval, guidance	
Project Support	Assists in planning and delivery	
Subject Matter Experts	Provide knowledge and answer questions	
Community Engagement Coordinators	Field resident inquiries, encourage participation	

Partner and Audience Mapping

Based on your project plan, which communities or groups do you think are most appropriate to involve in the engagement process? Consider both the relevance of the community in question, and to what degree they can participate independently. Is your engagement location based? Does your project affect an equity-denied community? If so, it will benefit both that community and your project to proactively reach out to them.

When scoping your audience, please see the [Ottawa Neighbourhood Equity Index](#), demographic and psychographic data through [Environics Analytics](#), and other resources available to you to understand community context and identify groups most impacted by

your project or least represented in engagement processes. Use these insights to focus your efforts and tailor outreach, for example, by partnering with community organizations, translating materials, or hosting sessions in accessible and familiar spaces. To ensure engagement is meaningful, equitable, and inclusive, remove barriers such as language, technology, transportation, timing, or childcare, and design activities that are culturally safe, relevant, and accessible so that all residents, particularly those from equity-deserving or underrepresented communities, can participate fully and have their voices heard.

When looking to meet with historically marginalized groups, it is important to first gain an understanding of the community before engaging. There are many resources available to you through the Equity, Diversity, Inclusion and belonging service area (EDIB) group including the [Wheel of Power](#) tool. In addition, there are “How to” guides that can assist you in reaching out to various communities. Each department has an Equity and Diversity lead that can reach out to the EDIB subject matter expert or [Indigenous Relations](#) team for collaboration and recommendations on next steps. The accessibility team is also available to help determine accessibility needs for engagement activities.

Consider:

- A group’s relevance to the project and their ability to participate meaningfully.
- Is the public engagement impact tied to a specific location? Is it likely to impact equity denied or historically underrepresented communities? If so, proactive and culturally responsive outreach is essential to ensure inclusive participation and to build mutually beneficial relationships.
- There is a requirement to consult with the [Accessibility Advisory Committee \(AAC\)](#) on council priorities, City Wide Masterplans, and services specifically for persons with disabilities (among other requirements)
- Does this project require Indigenous engagement? How have you verified this? If Indigenous engagement is taking place, what steps will you take to initiate it? You are encouraged to reach out to the Indigenous Relations team for support in planning.

The following matrix has four quadrants: Affected vs. Not Affected and Left Out vs. Included. Please note that the goal is to determine specifically who is affected **and** traditionally left out, and those groups will serve as the focus for your initial outreach. Those included or not affected are still important to reach out to but may not require the same level of effort as an affected & left out community is.

Identify key groups based on impact and representation. Use the quadrant below:

	Included	Left Out
Affected	Engage – Keep them informed, include them in consultations, and deepen engagement where appropriate.	Prioritize – Proactively reach out, remove barriers to participation, and create culturally safe, inclusive opportunities for engagement.
Not Affected	Inform – May be interested or influential. Share regular updates at key milestones, provide access to final reports or decisions, and maintain transparency to build awareness and trust	Monitor – May have experienced exclusion but not directly impacted. Include if future relevance is possible.

IMPORTANT NOTE: while your engagement may end up listing specific identities to reach out to (EG: the older adults, rural folk) remember that identity is rarely a singular experience. Intersectionality means that we have different identities that make up a whole, and when you’re planning your outreach consider how those identities may intersect and try your best to plan accordingly (EG: youth in rural areas may not have regular access to social media because of Wi-Fi connectivity challenges).

Based on the previous exercise, please list the potential communities, demographics, or groups you believe you will need to reach out to first. You can return to this section later to expand on the below.

Group/Community	Why we’re engaging	Outreach method

Consider intersectionality. Plan accordingly, including timing, location, accessibility, and budget if needed.

Issues Management

Projects vary in not only their scope but also their sensitivity. Based on your understanding of the project (and in discussions with your team), to what degree do you feel it will be a complex and heated issue? Include an “x” in the appropriate cell.

Determine project sensitivity.

Sensitivity Level	Mark with "X"
Not Sensitive	
Somewhat Sensitive	
Sensitive	
Very Sensitive	

Consider breaking the project down into smaller pieces and repeating the sensitivity level analysis for the different aspects of the project. For example, a construction project could be broken down into design, build, finance, plan. Each section may have different levels of sensitivity.

- Why this level?
- What questions or challenges do you expect?
- How will you prepare?

Preparing for Concerns

Projects vary in not only their scope but also their sensitivity. Based on your understanding of the project (and in discussions with your team), to what degree do you feel it will be a complex and heated issue? Include an “x” in the appropriate cell.

Consider using a facilitator from the City’s Facilitator Network by emailing public.engagement@ottawa.ca. The facilitators are trained, experienced staff who can help steer your engagement sessions.

Questions We Hope For	Concerns that may come up

Section 2: Design

Engagement Method:

Below are sections dedicated to planning the basics of different types of engagements. As this is a usable workbook, please delete sections that aren't relevant to your project.

Please remember there are certain requirements for your engagements, such as:

1. Content must be available in French and English, however depending on your audiences you may consider translating to other languages as well
2. Interpreters are required for in-person engagements, unless you have events dedicated to each language
3. Ensure all public engagement activities (including materials, physical location, and communication) are accessible by following the [Accessibility for Ontarians with Disabilities Act \(AODA\)](#) framework

Identify the engagement methods you will use for your project. You can reach out to the Public Engagement team at public.engagement@ottawa.ca for support in planning. Resources for each method are available for project leads on [SharePoint](#).

Include multiple ways to participate:

- Online (e.g., Engage Ottawa)
- Virtual (e.g., Teams, Zoom, with captioning and language options where possible)
- In-Person (e.g., pop-ups, workshops held in trusted, accessible, and culturally safe spaces)
- Targeted consultations (e.g., specialized community groups, advocacy groups, BIAs)

Engage Ottawa Page

Does your engagement include the use of Engage Ottawa? If so, map out a general explanation of the engagement vision for the project page. Remember to [request a page by filling out the following form](#).

Question	Answer
Method(s)	
Date(s)	

Virtual Event

Question	Answer
Max Participants	
Date(s)	
Platform	Zoom, Teams, YouTube, etc.
Moderator (A list of trained facilitators are available upon request)	

In-Person Event

Question	Answer
Max Participants	
Method	Focus groups, information meetings, pop-up events, workshops, etc.
Date(s)	
Location(s)	
Moderator (A list of trained facilitators are available upon request)	

Reminder: Consider accessibility, language (French/English), interpreters, and reaching people where they already are. [Public engagement sessions hosted by the City will be led by trained, impartial staff members to ensure neutrality and inclusivity. A list of approved facilitators is available upon request.](#)

Consider layout, timing, child-care, accessibility, need for facilitators or moderators (link to the list/email publicengagement@ottawa.ca)

Registering for Engagement Activities

Registering for engagement activities helps anticipate attendance, assess accessibility needs (e.g., ASL interpretation, captioning, mobility supports), and gather demographic information through tools like Engage Ottawa. While registration provides valuable planning data, it can also be seen as a barrier for some participants, therefore it is recommended to offer alternative ways to join.

Resident Journey

Plan for each stage:

1. **Notified:** Residents learn about the project
2. **Learns:** Access information with clear indication of purpose (inform, collaborate, feedback)
3. **Participates:** Engages in activities
4. **Acknowledged:** Receive confirmation and next steps
5. **Updated:** Learn outcomes

Customize as needed for your engagement.

Section 3: Communications and Promotion

Making Content Accessible

Please use clear and simple language that’s easy for all residents to understand. Follow the [City’s Communications Policy](#) and [Clear-Writing guidelines](#). Think about who will be participating in the engagement, consider if it should be translated into other languages or adapted to meet accessibility needs.

Communications Checklist

Please note that communications is a separate process from engagement and is meant to ensure people are notified of the opportunity to engage. To receive assistance when it comes to developing communications materials, **reach out to your Business Support Services team who will help connect you with your department’s assigned Communications Officer in Public Information and Media Relations.**

Below is a checklist for communications planning. To ensure you are alerting your target audience of the engagement opportunity, you will require dedicated communications. Bring the checklist below to your communications leads. If you are unsure if your project requires communications needs, please speak with your Business Support Services staff and Public Information and Media Relations.

Question	Yes/No	Action
Does this engagement activity align with a broader Communications Strategy		

or Plan? Is PIMR involved in the planning process?		
Does my engagement require communications materials such as social media, digital media, etc.?		
Does my engagement require translation into languages other than English & French?		
Are there accessibility requirements I need to consider?		
Have I determined how I will communicate the spectrum of engagement?		

IMPORTANT NOTE: when designing your engagement approach, remember that it's important to set up a way to communicate to participants what the project updates & results are. An easy way is to collect emails, or to work with community partners to distribute results. Think about the "how" behind updating participants on project updates from the get-go, to ensure you have a way of collecting information. Remember, you can also ask participants to help by encouraging them to share reports and updates with people who they think should know.

Section 4: Implementation

Timeline Overview

Plan major milestones:

Date	Task
	Publish project
	Launch engagement
	Social media
	Workshop(s)
	Close engagement
	Provide What We Learned Report

Section 5: Completion and Analysis

After public engagement, it's essential to 'close the loop' by showing residents how their feedback was considered and used. This builds trust, fosters transparency and accountability, demonstrates that their voices matter, and keeps the community informed about decisions. Closing the loop is especially critical for communities that have historically felt unheard or excluded from decision-making. Use the chart below to help populate the full "What We Learned" report.

"What We Learned" Report

Topic	Notes
Purpose	
Timeline	
Method(s)	
Participation	
Key Insights	
How was or was not feedback incorporated?	

In some cases, you may receive many responses. We suggest that you review and analyze responses, come up with common themes and summarize the What We Learned report in that way.

Sharing the Report

Now that you've drafted your What We Learned Report, how will you share it with participants? If your engagement included ways of collecting emails, send one to all participants with the file attached (or a link to where it is housed online, perhaps Engage Ottawa or Ottawa.ca). We encourage you to make it public to enhance transparency. If you worked with community partners, share the report with them so they can distribute it. You can speak with your communications support, or the Public Engagement Team if you need guidance.

Section 6: Reflection & Evaluation

Before you move onto a project wrap up and share your lessons learned, it's important to pause and reflect on the experience itself. This is your opportunity to identify takeaways, which can include positive experiences as well as challenges. All of this helps you prepare more for next time.

Final Objective Key Results

At the beginning of this workbook, you outlined potential objectives and key results for your initiative. Now that the project is wrapped up, how did things play out? Change and expand on this section as you see fit.

Objective	Achieved?	Notes

Successes

Public engagement can be a difficult yet rewarding experience, and it's important to celebrate the successes no matter how small. What went well regarding your engagement? Please add or delete rows & columns as you see fit.

What Went Well	Why	Notes

Challenges

Public engagement can be a difficult yet rewarding experience, and it's important to celebrate the successes no matter how small. What went well regarding your engagement? Please add or delete rows & columns as you see fit.

Challenge	Why	Notes

Evaluation Summary

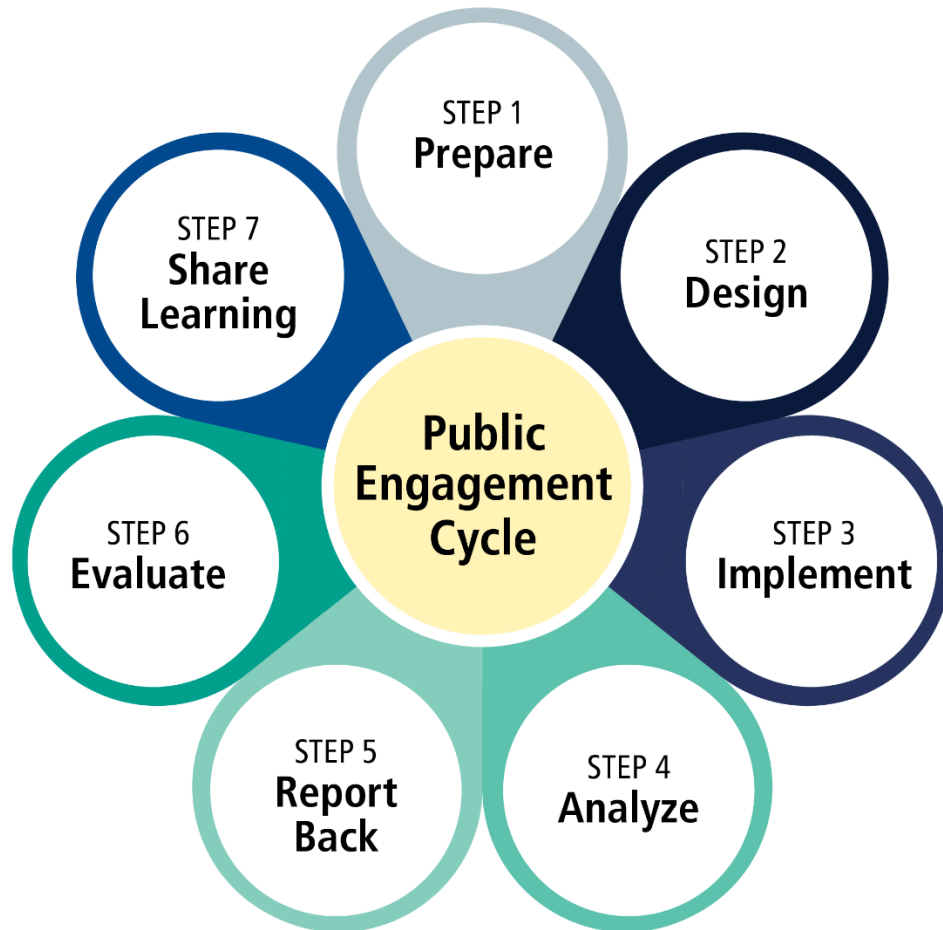
Now that you have completed your evaluation, list a general overview of the experience and next steps. What will you continue to do next time? What will you do more of? What will you do less of? What will you change?

For the Future	Reflections	Action
Continue		
Do More		
Do Less		
Change		

Share Learnings

Now that you've completed and summarized your engagement, share what you learned. You can fill out this [Shared Learnings Form](#) and forward the submission to your managers and colleagues. We also invite you to share this completed workbook with the Public Engagement Team in PIMR.

Task	Done?
Shared with team	
Shared with management	
Shared with PIMR	
Shared with other departments	



Section 7: Maintain Relationships

After a project ends, consider how to stay connected with those who participated. Staying connected shows that the project team values their input and helps to build trust over time. It also helps to build long-term trust, especially among communities that may be skeptical of engagement efforts due to past exclusion. When individuals and groups feel heard and involved, they're more likely to participate in future projects.

Examples of staying connected include:

- **Sending updates:** Share news about how feedback was used or about upcoming projects that might interest them.
- **Hosting follow-up events or online meetings:** Give people chances to ask questions or share more ideas.
- **Using social media:** Engage with residents through City channels to keep the conversation going.

Optional: Help Improve This Workbook

- Ideas to improve this guide?
- How can your next engagement be even better?
- What additional resources would have helped?

Share your thoughts with publicengagement@ottawa.ca .