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Memorandum to the Planning Commission
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Project Name:	**COVID-19/Physical Distance Public Participation Guide**
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Dear Planning Commissioners -

Please see attached document describing guidance our staff are currently utilizing and applying to our projects regarding public participation for our comprehensive plans and policies during the COVID-19 crisis while restrictions on in-person gatherings and physical distance requirements are in place.

Being able to engage the public in our work is crucial to moving our essential community planning and policy projects forward during this time. Public Health orders in San Francisco and California have required staff and public alike to "shelter-in-place". These restrictions on in-person gatherings create significant challenges for conducting meaningful public engagement. At the same time, certain "essential functions" have been allowed to continue during the emergency. San Francisco's Public Health Order No. C19-07b classified the production of housing that is at least 10% affordable as essential to public welfare and worthy of advancement during the emergency. For this reason, certain planning projects are moving forward and have recent or upcoming hearings at the Planning Commission, including the Market and Octavia Plan Amendment, Balboa Reservoir development project, Housing Affordability Strategies, and Housing Element. The Planning Commission has been encouraging the public to remotely participate in their web-based hearings since April 9, 2020.

Crucially, we must keep to our principles of equity and inclusivity when considering physically distant public participation strategies, and ensure that we can reach all affected stakeholders and interested community members, particularly vulnerable and hard-to-reach populations. We must also consider which projects are essential to move forward during this time because they address the COVID-19 crisis or provide essential services such as producing or enabling affordable housing, and which projects may need to delay public participation due to lack of public availability to focus on non-essential issues at this time or ability to meaningfully engage the public in key decisions and inputs.

The COVID-19/Physical Distance Public Participation Guide shares how the Department is approaching public participation on policy issues while physical distance restrictions are in place. The guide is geared toward our comprehensive plans and policies, which typically rely on public workshops, focus groups, pop-up events, and other in-person gatherings. However, it may have utility or could be adapted to the types of public engagement that are common throughout the Department, such as expectations for project sponsors, pre-application meetings, or scoping meetings.

The guide presents an overall approach and set of tools and strategies. It should not be considered a one size fits all approach. Each project should consider the guidance, conduct thoughtful public participation planning building on existing project engagement strategies, and modify these strategies to tailor the tools to the particular circumstances of the project.

This guide does not replace the need to do thoughtful public participation planning. Rather, it presents a set of considerations, guidelines, and tools and strategies to modify that planning given current conditions. It also recognizes that the City will be changed by COVID-19, as employment and housing security are increasingly challenged. We should protect the ability of the most vulnerable to participate, and balance that need with the ability to take swift and needed action and advance policy to elected officials to safeguard welfare, protect public health, and stabilize communities. This document is an evolving and live document. New tools and strategies may be added as we learn about them. We welcome your thoughts and feedback on the document.

REQUIRED COMMISSION ACTION

None – informational only

ATTACHMENTS:

1. COVID-19/Physical Distance Public Participation Guide

COVID-19/Physical Distance Public Participation Guide

1. **Introduction**

   The current global COVID-19 pandemic and shelter-in-place order is creating major impacts in our communities, particularly for the most vulnerable populations. Pre-existing barriers to engagement are heightened and there is a changed landscape for conducting community engagement. Public participation remains an essential part of developing and adopting well-informed plans, policies, and projects. However, many of our traditional methods of public outreach and engagement are not feasible right now. This is the time for us to challenge our thinking, prioritize equity, and reflect on how we can be accessible to the most vulnerable communities. It is an opportunity to connect and invite communities to reflect with us to draw on lessons from this crisis in finding collective solutions toward a more resilient city.

   As we invite participation during this emergency, we must be sensitive to the increased difficulty that many face in meeting their basic needs for securing food, shelter, and necessities and maintaining their income while caring for children, the elderly, and infirm. We must consider the psychological state of communities when deciding if projects should move forward with engagement aspects and balance this with the impact of delaying essential projects or public participation.

2. **How to use this document**

   This guide presents considerations, strategies, potential platforms, and resources for conducting public outreach and engagement to effectively inform and garner feedback without in-person contact.

   The tools and guidelines in this document are meant to be universal to the Planning Department's comprehensive planning work. Staff should modify outreach and engagement strategies and tailor the tools and approaches based on the specific needs of individual programs and projects.

   Staff should use our prior public participation tools and guides for preparation and additional guidance not contained in this resource. There are some links at the end of this document. This document is not meant to be exhaustive of best practices.

3. **Guidelines/Considerations**

   Prior to planning specific/individual outreach or engagement events, take a moment to anchor your strategy in the following approach:

   A. <u>**Prioritize Equity**</u> – How will your engagement strategy and your project, in light of the crisis, advance racial and social equity to ensure inclusive engagement and equitable outcomes? Think about how the crisis will affect the project outcomes and who will be impacted the most (i.e. less funding, less affordable housing, more displacement during this time, etc.).

   B. <u>**Respect Health Needs.**</u> Currently, city staff and the public alike are living under a shelter-in-place health directive that necessarily limits all nonessential travel. When neither residents nor staff can leave their homes, options for face-to-face connections are severely limited. There may be a nearer future where non-essential travel is permitted but physical distancing needs still influence public participation as group size, personal proximity and touching of shared materials may be

limited. This period may affect communities differently as the elderly and immune-compromised could remain at risk for longer periods. At all times, public health needs must be accommodated and prioritized. See latest DPH COVID-19 Health Orders <u>here.</u>

C. <u>**Connect and Listen**</u> – Be present, listen and engage in community platforms. Take time to build long-term trust and relationships prior to larger events and throughout the life of the project. Schedule phone calls/virtual coffees with community stakeholders to better understand the current state of the community. Work in partnership with community stakeholders to determine how we can best serve them now and co-create an engagement approach that can unify efforts in addressing mutual priorities. It's particularly important during this time that engagement is not transactional but inclusive, and that we understand the long-term impacts of the crisis and what our role will be in addressing these challenges.

D. <u>**Reflect on Message, Tone, Conditions and Scope**</u> – During this unprecedented time, it's important to establish clear and consistent messaging around your intentions for engagement and whether your project can help address the short- and long-term priorities of the community. Reflect and use what you have learned from connecting individually to understand how the crisis will impact the message and scope of your project.

> Consider the current psychological state of communities when deciding if projects are essential that you should move forward with engagement. Many people may not have the time or emotional space to consider issues outside of their immediate circumstances; others may have more time than usual and welcome something to focus on outside of their daily lives.

> What are the pros cons of doing engagement during this time? Are there differences between who has availability and who does not? What are the consequences of delaying engagement? Will the lack of public action increase inequities? Who benefits from project delay and who benefits from project advancement?

> If you move forward with engagement, frame your message in the context of what the community is currently experiencing so that your project objectives resonate and motivate people to get involved. Work in partnership with community stakeholders to determine how we can best serve them now and co-create an engagement approach that can unify efforts in addressing mutual and intersecting priorities.

E. <u>**Adapt Tools and Strategies**</u> – Adapt the tools and strategies based on current constraints. Be mindful of using outreach and engagement tools and platforms that are most accessible to the communities you are engaging, with particular attention to the most vulnerable members and hard-to-reach populations.

F. **Plan for a Broader Engagement Strategy** – Think beyond the immediate constraints and engagement challenges to how this will change your communications and public participation strategy for the life of your project and beyond the project (how you will maintain relationships and connections, how will you reach people you were unable to reach during this time, where can feedback unrelated to the project but present in people's minds be directed, etc.). Coordinate with other projects and managers, as needed, on needs uncovered beyond the scope of the project.

Additional considerations

- o If you have an essential project and require additional public participation to get input and complete the project, use or adapt your pre-existing public outreach and engagement strategy to determine:

  - What do you want to accomplish by conducting engagement now?

  - Who still has yet to be included?

  - What decision points do you need to bring or revisit with the public?

  - What would <u>motivate</u> people to participate now?

  - Why should this community care or be involved?

  - How are you going to reach people to participate in engagement activities?

  - How does your project's goals intersect with the communities' priorities?

- o Consider the communities you are trying to reach and their barriers to online engagement. This is particularly important in vulnerable communities, where in-person engagement already poses barriers to participation. Use a comprehensive approach, utilizing a combination of tools (including offline tools like phone and hard mail) to ensure the process is inclusive and the information loop is reciprocal. Please keep in mind:

  - What will the feedback loop look like?

  - What tools will you use to keep people engaged and informed?

- o Service Considerations:

  - Languages: what kind of language access would you provide for your engagement if it were not remote? Do you need translation/interpretation?

  - ADA: text captioning, signed videos, online materials for people who use assistive technology

  - Digital divide: provide call-in options and paper feedback options

- Hosting separate, pre-event tech trainings to ensure connectivity and understanding of program; Increase community capacity (include tool help links/resources in invitations and reminders; hosting a 15-min before technical assistance session?); providing training and materials for review in advance of engagement day to allow people time for review and prep time

- Recording and sharing afterward; consider anonymity, privacy, mobile app and web friendly formats

- How does feedback and public comment that is not written or video recorded get documented?

4. **Strategies/Methods/Tools**

Determine the most appropriate tool to use by first considering:

- Audience: Who do you want to engage?

- What are their barriers to participating?

- How are your community partners or community leaders communicating with this audience?

- What's the best method of communication? (mail, newsletter, email, social media, etc.)

- How many people do you want to hear from?

- How will they know engagement is happening?

- What kind of input do you want to gather?

- How will you ensure an inclusive process and engage those without internet access?

- What is the contingency plan to address technical challenges that might arise?

Below are a series of possible engagement tools/platforms that could be used remotely during this time based on the level of engagement that you have determined is appropriate for the project and for key decisions that require public input. Existing and additional tools are linked at the bottom of this list.

This table provides examples of the types of tools available – not all tools may be available to the department at this time. Work with the Department's IT Division to determine which tools are currently available.

A) Inform - "Here's what's happening"

- Provide stakeholders with balanced and objective information to assist them in understanding the problem, alternatives, and solutions.

INFORM	
Example Methods & Potential Platforms	**Consideration**
Email Newsletters, e-blasts, and blog posts	- Build a subscriber list - Encourage readers to reply - Make it personal - Keep emails out of spam folders - Include links and a clear call to action - Make emails mobile-friendly - Include content in multiple languages - Make it easy to unsubscribe
Social Media Facebook, YouTube, Twitter, WeChat, Instagram, Next Door	- Don't do it all. Choose relevant social media tools based on your target audience and capacity to maintain the channel. - Quality over quantity is key. - Use the Rule of Thirds when posting – 1/3 of content promotes your project; 1/3 shares relevant content of others; 1/3 should be engaging and interacting with others - Use visuals to inspire higher interaction and engagement rates (images uploaded to Facebook get 5X the interaction) - Use the tool to discover new audiences within the community
Department Website	- Website address should always be clearly visible on all project materials - Ensure website is kept up to date regularly and at key project milestones – out of date content will deter people from visiting again - Highlight key milestone or project highlights clearly on homepage - Consider Accessibility - Make a central location for: - General information - Fact sheets - Downloadable resources - Photo galleries - Registration forms - Meeting minutes, strategies, etc.
Advertising & Media Paid advertisements: radio, newspapers, TV or online, Geofencing	- Use a mix of paid advertising and unpaid earned media - Target your message to your audience and use suitable media outlets trusted by your audience

Free media: press releases, news conferences, media packages or letters to the Editor	- Use engaging visuals - For radio, a short, use engaging soundbites - Designate a trained media spokesperson - Messages have a better chance of being picked up if they contain a strong hook or element of excitement or risk
Mail/Posters Printed informational collateral: doorhangers, posters, surveys, instructional material, (e.g., FAQs, factsheets). Add posters or mailings at places where people are: food deliveries, door hangers, grocery stores, etc.	- Include visually appealing graphics and colors - Keep information short and concise - Include contact information - Include a clear "ask": state what is needed (e.g., visit website, fill out survey, etc.) - Translate into multiple languages - Large print for seniors - Door hangs, flyers, postcards, letters, posters
Video Digital videos posted on a website, social media, through email and texts	- People are more likely to click on an email containing a video - Great tool to convey messages quickly and succinctly - Consider using a video to launch an engagement activity, encourage participation, update a community about a project's progress or inform community about a consultation's outcomes - Videos should be short (under 5 mins) and include a variety of presentation styles, images, intro/outros and most importantly, they should be entertaining! - Add closed captioning to ensure accessibility

Online Presentations/ Town Halls
Zoom, GoToMeeting, WebEx, Microsoft Teams, Live-streaming through social media platforms
	- Create the ambiance of in-person connection in virtual space:
	  o Pre-technology setup
	  o Strong facilitation / be prepared
	  o Use video function, see human faces
	  o How will we introduce one another?
	- Set the tone right away - Do you want your presentations to be a 'one-way' or a 'two-way' street?
	- Consider partnering with a Community Agency in co-hosting "Town Hall"
	- Consider using nametags so that you can call people by name directly
	- Don't use slides as a crutch – people have taken the time to come and hear you speak, so don't relay information in a way that would have been better suited for someone to read
	- Be engaging and use slides to portray key messages, include visuals where possible
	- Be personable – don't speak down to people or in language they won't understand. Treat your audience as fellow citizens and show them that you value the time, they've taken to engage with you.
	- Consider live-streaming or video recording your presentation

Automated Calls & Texts Hustle (Texting Platform), Whatsapp	- Set up dedicated phone lines - Pre-record messages - Set up automated phone calls and SMS messaging

B) Consult - "Here's what we have, what are your thoughts."
- Obtain stakeholder feedback on analysis, alternatives, and or decisions

CONSULT	
Example Methods & Potential Platforms	**Consideration**
Phone Interview/ Check-ins In-depth one-on-one interviews or check-ins via phone	- Prepare and test an interview script to familiarize the types of questions you want to ask - Consider the questions you ask, avoid questions that: o Put the interviewee in the defensive o Look for two answers in the same question o Are too long, too involved or too intricate - Can be very helpful when you need information about assumptions and perceptions - Consider suitability of approach before moving ahead, interviews may not make sense if: o project is dealing with a large population and interviews would be time-consuming and expensive o information you are collecting is numerical o Respondents are unwilling to participate - Record or take notes during the interview - Put quotation marks around the person's actual words, and don't embellish their quotes
Surveys (e.g. Survey Monkey, Typeforms, Google Forms, WeChat, MetroQuest)	- Used to determine community attitudes or target a particular group - Surveys may be carried out in a number of ways depending on the purpose, scope, and stakeholders involved - Key tips: o Keep it simple o Avoid leading and ambiguous questions o Balance open vs closed questions o Give time - Allow enough time to gather a sufficient number and variety of responses o Provide options to opt out or clarify o Proposed answers may not be relevant to all respondents. o When using lists, offer the option to select and clarify "Other" - Provide print surveys through the mail with pre-paid return envelope
Online Polling (e.g. Doodle, Poll Everywhere)	- Online polls are a fast and easy way to take the pulse of the public about topics of interest - Polling can be used to gauge support for a municipal initiative or for lighter topics like getting to know an audience or voting on meeting locations - Polling allows a certain level of anonymity which can help break down barriers for people who are weary of sharing their opinion openly or in front of a group

	- Can be done in real time (during a virtual meeting) or can be integrated into an email or featured on your website. - Can be used to "Empower" if results directly determine the decision
Virtual Office Hours or Focus Groups (e.g. Zoom, GoToMeeting, WebEx, Microsoft Teams, AT&T Bridge, Free Conference Call)	- Be prepared to listen, create safe space for difference in opinion - Have questions prepared, keep it simple and objective. Ensure they are open and not leading questions. - This is an opportunity to make yourself more available in building deeper connections - Consider how their direct feedback will provide dive deeper into the issue - Focus groups are more structured conversations with a set of questions and pre-determined or random set of public. Office hours are opportunities for open-ended questions and conversation with the public

C) Involve & Collaborate - "What ideas do you have, let's work together to solve this issue"

- Work directly with stakeholders throughout the process to ensure their concerns and aspirations are consistently understood and applied

INVOLVE & COLLABORATE	
Example Method & Potential Platforms	**Consideration**
Create Online Forum/Custom Platform An online forum is part of a website where expression of viewpoints and discussion can take place (e.g. Konveio)	- Be a leader – step in and encourage users to interact with one another. - Online forums are open to postings for a set period of time: hours, days, weeks, months or indefinitely. - An administrator has the ability to add, edit or remove content. - The administrator can create the topic of the online forum or can allow individual users to create it. - An online forum is accessible at any time of the day and therefore may appeal to regular Internet users - The forum can be open to anyone and can be anonymous, or only to members who sign up with a special username. - Make it easy to participate - Use multiple entry points. (email, newsletters, intranet, posters) - Welcome and encourage new users by making them feel comfortable and ensure they know how to use the technology - Ask questions that matter - Asking questions using actionable language is recognized as a good way of generating discussion. - Engage with the comments – when a new comment is received, respond to it in a timely manner so people feel that they've been heard.
Document Co-Creation (e.g., Sharepoint, Google Docs)	– Allows individuals to collaborate on a project in real time from different locations. – Provides the opportunity to contribute and build upon a document at a time that works for you –

	always having access to the most up to date version of your file.
	− Most co-creation documents offer the ability to chat and add comments while building a document together.
	− Be mindful of who has access to the document and whether or not they have the ability to 'view' or 'edit'

D) Empower - "How can we support you in creating solutions"

- Shared leadership of community-led projects with final decision-making at the community level

Empower is an overall goal to frame your approach. The methods and tools listed in this document are meant to provide as much virtual accessibility to your work as possible but the context should be grounded in empowering the community in giving as much opportunity for them to be active and drive the solutions. This could include:

- Online voting platforms

- Partnering w/ Community Based Agencies

- Social listening through social media platforms

- Participatory action / budgeting

- Encourage/coach community to public comment / attend PC meeting

Examples of projects framed to empower:

- Bayview Community Based Transportation Plan
- 90th Ave Repaving and Redesign (Scraper Bike Lane)

5. More Resources/Links

- IAP2 – International Association for Public Participation
- Oakland's Tool kit: How to do Online Meetings and Town Halls
- Marketplace.city
- Kittelson & Associates
- Movement Strategy Center