

A User Guide to Online Engagement Tools

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Master Project, Spring 2018

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Introduction

Community engagement, an integral component of the planning process, affords community members the opportunity to weigh-in on projects that may impact their well-being. While typical engagement activities include transparent reporting and town hall meetings, there has been a shift in how governments, developers, and planners engage with the public to encourage their participation. Although community meetings and face-to-face interaction are valuable, it is often difficult to get citizens to engage due to time constraints, lack of accessibility, and pessimism about their ability to make a difference. Therefore, the push to make data more accessible has led many cities to use technology to increase participation in the process. The use of digital engagement tools to increase awareness and aide in collaborative decision-making is not only useful, it is becoming necessary.

Existing research in the planning field is narrowly focused on why planners should utilize such digital tools rather than how to use them successfully. Further research matching the why with the how is necessary so that planners can understand the ways that their processes can be improved with these tools.

This master's project will focus on best practices for using digital tools developed for community engagement. The end result will be a user guide aimed at making planners aware of the various tools that exist and how to select the best ones for their engagement process. Planners can access this guide by visiting: <https://engagecommunityonline.web.unc.edu>

Background

Technology developed for community engagement has grown substantially in the past five years. Many of the new online tools address the issues found in traditional engagement processes.

Although offering more options for planners, these tools have strengths and weaknesses and engage citizens in different ways, so when it comes to guiding planners through digital engagement processes it is easy for them to become overwhelmed with the many choices they have. Some projects need engagement processes that will collect survey data, allocate budgets, or rank the priority of projects, and similarly different engagement tools collect this type of information through different platforms. Therefore, understanding the types of data the tool collects, the ways it collects that data, and how that data best informs the project, will help planners to better engage with the public and to have better outcomes in their planning.

Traditionally, planners have used public meetings, charrettes, and other in-person meetings to run engagement processes, but these have varying successes and can fail to bring a wide, representative group from the community to the table. Technology fills this gap, with engagement tools reaching a bigger audience and collecting data in thoughtful ways. Naturally, there are barriers to using these technologies, as not every community member will have access to, or knowledge of, the tools. However, this gap is closing as technology becomes more widespread and accessible. In 2017 the Pew Research Center reported that 88% of U.S. adults use the internet, 77% own a smartphone, and 73% have broadband at home¹. These numbers have steadily increased since 2000, indicating that technology is becoming more and more accessible for the American public.

Popular belief can lead to assumptions that spending more time online limits social interactions and therefore limits social capital and civic engagement. However, research done by

¹ Smith, Aaron. Record shares of Americans now own smartphones, have home broadband. Pew Research Center. 2017

Dhavan Shah, et al, in 2002 found that time spent online is significantly and positively related to both traditional civic participation and public attendance². This research shows that spending time online actually gives access to resources that facilitate social interactions such as email and chat boards, and social media spreads information to larger audiences. Shah, et al, conclude that the internet holds promises for civic renewal efforts that target youth, adolescents, and young adults -- populations often truant in community engagement processes.

Significant research has been done on the use of technology in community engagement processes. Attygalle writes that as online tools for community engagement develop, it involves citizens who typically do not participate.³ Removing barriers makes citizens more accountable for how their community grows, shifting power between planners to the public. Attygalle claims if planners were to use tools that allow for this shift in power, communities could be more responsibly and collaboratively developed. However, they first need to know which tools to use.

A guide for best practices using technology to engage underrepresented communities in planning, written by Jill Locantore, shows the potential for improving planning processes through online engagement tools. She claims social media is highly effective in engaging these groups, as people expect engagement on these platforms. Social media can be effective for conducting research and gathering input from a variety of different demographic groups, as 72% of all online users use social networking⁴.

² Dhavan Shah, Michael Schmierbach, Joshua Hawkins. Nonrecursive Models of Internet Use and Community Engagement: Questioning Whether Time Spent Online Erodes Social Capital. 1 December, 2002. Sage Journals. Vol 79, Issue 4.

³ Attygalle, Lisa. Forward: How technology improves community engagement. Engage! 2015. Pages 39-43

⁴ Locantore, Jill. Engagement Technology For All: Best Practices for Using Technology in Engaging Underrepresented Communities in Planning. Placematters.org. February 2014.

Nader Afzalan's dissertation evaluates how and why online participatory tools are used in plan making, specifically looking at three tools: MindMixer, PlaceSpeak, and Shareabouts. He finds that of the planning organizations using these tools, 88% reported that they were "satisfied with the usefulness of the tools during the planning process. The tools allowed them to engage with a wider array of people which created cost savings when compared to in-person methods, and the ideas collected from the public were representative of the broad community."⁵ He also points out that planners and researchers still don't understand how online planning technologies are useful to plan making or what factors influence their usefulness.

In fact, several articles and papers point out limiting factors to understanding these tools. Raynes-Goldie and Walker argue there is a lack of established methodology for evaluating the effectiveness of online civic engagement tools⁶. The Field Scan of Civic Technology developed by Open Plans also points out this lack of evaluation, and adds it to several issues in developing these tools. Specifically, they point out three areas needed to be addressed to advance the field; (1) better means to share and evaluate existing tools, (2) infrastructure required to support these tools, and (3) marketplace of vendors providing these tools.⁷ Several researchers point out best practices for use of community engagement tools stressing the importance of understanding the stakeholders involved, developing toolkits for a variety of uses, and still supporting face-to-face engagement in addition to online tools⁸. However, in order to successfully use the tools, it is

⁵ Afzalan, N., Sanchez, T., Evans-Cowley, J. (2017). Creating Smarter Cities: Considerations for Selecting Online Participatory Tools, *Cities*, 67, 21-30.

⁶ Raynes-Goldie, Kate, and Luke Walker. "Our Space: Online Civic Engagement Tools for Youth." Civic Life Online: Learning How Digital Media Can Engage Youth. Edited by W. Lance Bennett. The John D. and Catherine T. MacArthur Foundation Series on Digital Media and Learning. Cambridge, MA: The MIT Press, 2008.

⁷ OpenPlans and Living Cities, Field Scan of Civic Technology. 2012.

⁸ Locantore, Attygalle, Raynes-Goldie and Walker.

imperative that planners understand which tools to use for a successful engagement process. Therefore, the field must focus on creating a standard way to evaluate these tools, which is the aim of this master's project.

Need for Community Engagement

Community engagement is an important part of any public planning or development project, yet sometimes is not adequately incorporated. Simply put, community engagement is the process of providing access to information and providing an opportunity for community actors to give feedback in order to make well-informed decisions. Traditional engagement strategies are used to involve citizens in development projects, yet they are on how much information is shared and on opportunities for feedback. Often times, development projects most supported by the community are the ones that incorporate community engagement in the planning process.

Critique of Typical Community Engagement Efforts

There can be many negative effects from the absence of community engagement in projects.

As outlined in Porter's article, *Breaking the Development Logjam*,⁹ developers can lose money, time, and predictability in the development process. Local officials risk losing the public's trust. Most importantly, the community can lose confidence that their input will be taken seriously. These negatives effects show that not only is it important to have a community engagement process, it needs to be effective. Unsuccessfully engagement fails to incorporate community feedback, facilitate productive conversations between developers and local officials, or result in developments that are profitable for the developer and create an asset to the community.

⁹ Porter, Douglas R. *Breaking the Development Logjam: New Strategies for Building Community Support*. ULI –the Urban Land Institute. June 2006. Print.

Many activities have been designed to engage community members during development projects; the most common being public meetings. These events allow for local officials and developers to present projects to a large group of interested community members and provide opportunities for public comment. However, these public meetings can present a variety of issues. To keep meetings within time limits, information has to be concise and details may be left out. If there is a large presence, there might be a time limit imposed on public comments or a cap on the number of citizens that can give comments. The timing of meetings can affect working families with responsibilities who may be unable to attend. In addition, many members of the community may suffer from “planning burn-out”, a term used to describe attending too many planning meetings that fail to produce results. From the developers’ or city officials’ point of view, reserving meeting space, preparing materials such as posters and handouts, and staff time spent attending meetings can become costly. If there is a low turnout, the cost per citizen engaged can be considerably high.

Engagement processes working to improve stand-alone public meetings can utilize surveys or project websites. Surveys can be sent to the community via mail or collected in person to gather information relevant to the project. If well designed, a survey can inform the project's development, however surveys might not include the right types of questions or there could be a low response rate. Surveys can also be very expensive to conduct. For the same reasons as the public meetings, citizens may not be inclined to respond to a survey due to lack of time or motivation.

Websites allow for developers or officials to create an online presence to provide information about the process, including project descriptions, meeting times, results of

community input, or developmental progress. While websites can be a great way to share information and keep citizens informed, city websites often suffer from poorly designed layouts, lack of updated information, and difficulty in advertising the project website. Developer-created websites face similar challenges, and may have trust issues from those who believe developers are only going to give information that portrays the project in a positive light.

Another engagement process is the charrette, which is a meeting-like session where community members, designers, developers, and public officials work together to create a vision for a development project. It provides a forum for all actors in the community to share ideas, offer feedback, and troubleshoot issues, giving designers and developers the chance to advance their project. They allow for the community to feel like they are directly affecting the project while allowing developers to guide the discussion in a productive way. Charrettes often will start with a presentation to describe the project and the goals of the session. They could include a walk-through of the site or project design to-date, and then small groups may break off to offer feedback and go through the design process before reporting back to the whole group, creating a shared community design. While charrettes are a great way to get feedback from the group and to reach a tangible result, they also are not without issues. Charrettes can be incredibly expensive and could easily cost developers or public officials more than \$100,000 in order to cover the cost of materials, design tools, refreshments, site-visit logistics, event space, and facilitators to run the processes. Oftentimes, charrettes can occur over a series of 2-5 days. Given this huge time commitment, it is very difficult to get citizens to attend. This can frustrate developers and local officials who spend a significant amount of time to plan these processes but

then have a lack of attendance, leaving a small group to make opinionated decisions that may not be representative of the entire community.

While these engagement opportunities are planned with the best intentions in mind, they all have their drawbacks and can leave everyone involved frustrated with the outcomes. When developers and officials spend time and money to plan these events, they hope that the community will be responsive and participate in the processes designed for them. However, it is often typical that the members of the public that attend are those who have very strong opinions about the project. Those groups are typically composed of working families. Developers and officials know that working families are often not willing or able to come to these events. Special efforts are often made to encourage them to attend meetings by providing food and childcare during evening meetings, hosting meetings at different times such as a lunchtime meeting in addition to evening meetings, and even partnering with community groups at social events to try to encourage citizens to provide feedback.

Other groups poorly represented in these meetings include homeless individuals, those with low mobility or disabilities, and other marginalized groups such as those in low-income neighborhoods, people of color, or illegal immigrants. Exclusion of these groups results in poor community representation, as only the small percentage of the community able to attend will be speaking on behalf of everyone. If efforts are not made to reach out to these marginalized groups, they may feel their opinions are not wanted and their participation is a waste of time. Homeless individuals, as well as those with low mobility or disabilities, may not be aware of these engagement processes or have the means to participate, even if they are willing to do so. By considering accessibility in the design of these processes, more people could be reached.

Of course, there will always be truant members of a community that are unaware of the engagement processes, or are aware but chose not to attend. Planners and developers must still plan for these people because they will affect the way the community grows and develops. One such group in college towns is students. Students usually do not live in the university's city or town year-round and are only there for a short period of time. Therefore, they may feel like it's not necessary to be a part of the engagement process. However, a large population of students can have implications on the development of a town on things such as housing development, commercial activity, and economic stability. Planners and developers should account for the effects that these kinds of populations have on the community.

It should be clear that effective community engagement is important in order to prevent the negative effects of its absence. Well-designed engagement processes can lead to having a better representation of the community in the feedback stage, and can lower the cost of these events if they are well attended. However, barriers will always exist, so by looking to technology to help overcome them, the field of planning and development can further improve their community engagement processes. Especially by combining online engagement tools with in-person engagement opportunities to successfully reach a broader audience.

Technology and Community Engagement

Technology has allowed for communities to increase their community outreach, especially through the use of online engagement tools. Such tools can come in the form of mobile apps, websites, or social media platforms that utilize methods of providing information and collecting feedback. Online technologies allow for planners and developers to engage with more people than traditional participation techniques. And although technology has achieved successes in

engagement, there are still considerable barriers to navigate before to can reach its full potential. Therefore, it is important to use these online tools in addition to with in-person techniques.

The use of online engagement tools has benefits tied to increasing community capacity. For one, it allows for developers and planners to save time and money. Rather than spending time to create and organize surveys or charrettes, officials can use these tools to gather data more efficiently. They also can strategically use tools to determine which groups are not participating and then target those people, thereby using limited resources more effectively. For example, if an online tool only reaches community members that have access to technology, then developers and planners can use different engagement tools such as in-person surveys or community meetings to target the specific group of non-engaged people.

Cost savings can also be achieved using online tools. Research done by the Metro Nashville Planning Commission on cost comparisons of various engagement processes used for their APA award-winning NashvilleNext project shows that on average the online engagement tool MetroQuest cost \$3/participant, MindMixer cost \$8/participant, and Textizen cost \$9/participant¹⁰. Meanwhile, engagement techniques such as focus groups and meetings range between \$43-\$47/participant. These tools also increase the public's access to information while collecting feedback. Planners can then create plans based on data-driven recommendations and a clear understanding of what the public wants. Overall, this improves the community engagement process.

However, there are still many barriers to incorporating these technologies. Most significantly, local governments are often constrained by a lack of staff and financing to support

¹⁰ Biggs, Dave. How Much Does It Cost to Engage a Citizen. MetroQuest.com. 2016.

the use of these tools¹¹. And because these tools are still fairly new to most communities, there is a perceived risk of using them due to a lack of knowledge about the tools that exist and best practices for using them. Planners are not online communication experts, and may be apprehensive about using tools initially without prior knowledge of their maintenance.

While technology is rapidly increasing the opportunity to reach more people, it can still be difficult to reach low-income individuals through technology alone. This is likely due in part to a lack of awareness of available opportunities to engage and limited language skills or reading comprehension. Previous negative experiences resulting in mistrust or hostility towards government can also limit the potential of these tools¹².

Currently the field of online community engagement lacks a deeper exploration of community needs necessary to develop these tools. Most online engagement tools are not built in partnership with the intended users or in response to their pressing concerns, but rather are created as a one tool fits all engagement process. Some developers have recognized the complexity of development process stages leading to the creation of different tools designed for those different stages. However, news of successfully using these tools travels slowly making it difficult for other communities to share and benefit from the successes of others.

In addition to barriers, there are negative outcomes that must be considered such as how this technology can be used to skew data or frame issues by the moderator. Negative comments can be omitted on websites to make it seem like there are only positive responses, resulting in the community losing trust in developers and becoming more opposed to development projects.

¹¹ OpenPlans and Living Cities, Field Scan of Civic Technology. 2012.

¹² Locantore, Jill. Engagement Technology For All: Best Practices for Using Technology in Engaging Underrepresented Communities in Planning. Placematters.org. February 2014.

Instead, by allowing for more transparency and responding to negative comments, a more open dialog can develop and improve relationships.

Lack of action taken after gathering data can also cause users to become frustrated with the process causing them to believe it was a waste of their time. Sometimes planners or developers don't include feedback from the community because they don't agree, or what has been suggested is too expensive or difficult to provide. But by acknowledging the feedback and coming to a compromise, rather than ignoring it, planners and developers can find creative ways to benefit the community while still receiving support to get projects approved. It is important to consider these potential negative outcomes when creating a mindset for community engagement methods and using digital engagement tools.

By building a mindset for how best to use online engagement tools, the field can achieve the ultimate goal of community engagement -- giving power back to the community¹³. These tools allow the broader community to give feedback based on accurate information and make informed decisions about how they want their community to be shaped by development. This shift in power however, is limited by the barriers and potential negative outcomes outlined previously. A balance of both digital tools and in-person meetings should be included from the start so the use of the tools can become more normalized. Communities also need to take a more active role in building and using the proper tools to effectively collect feedback. To do that, there needs to be a better understanding of the tools that exist.

A better network among developers and planners in developing and using these tools is necessary. There is plenty of research on *why* we should be using this technology, but what is

¹³ Attygalle, Lisa. Forward: How technology improves community engagement. Engage! 2015. Pages 39-43

missing is the *how*. The field scan of civic technology done in 2012 by OpenPlans and Living Cities recommends the need for three steps to create this network: (1) A better means to share and evaluate existing tools, such as peer networks and product reviews; (2) Developing the infrastructure (data policy, technical policy, etc.) required to support many civic tech solutions and make them portable between cities; and (3) creating a more robust marketplace of vendors providing civic tech product and services.¹⁴ This research project focuses on the first step, creating a better way to evaluate existing tools as a means to share them with other communities.

Given the nature of planning, there are different goals to be achieved through community engagement processes as such gathering comments on proposed projects, deciding on guidelines, or implementing project plans or budgets. Therefore, not all tools can be similarly applied to all projects to address different goals. By creating a methodology for how to analyze tools, planners and developers could better understand how and when to use them, what specific types of feedback they can collect, and which tools would work best for their community. A user guide that applies this methodology to each tool would give planners an easier way to learn about different tools that exist and build a better toolbox to improve their community engagement processes.

Best Practices for the Development of Engagement Tools

Understanding best practices for the development of online community engagement tools, and determining what makes them successful, is necessary to create a critical methodology. Using

¹⁴ OpenPlans and Living Cities, Field Scan of Civic Technology. 2012.

three case studies on popular tools, this project aims to design a methodology that can be useful to systematically analyze online tools, based on factors that contribute to the best practices of the field. The three studies explore CoUrbanize, MetroQuest, and EngagingPlans; all well-established tools used throughout the planning field. They also meet the three criteria used to define an online engagement tool for the purpose of this project: (1) the tool is available on the internet, (2) the tool enables members of the public to participate, and (3) the tool provides software as a service (SaaS) product, meaning that it is an application available over the internet rather than having to be downloaded onto a computer. For each case study, the analysis will include:

1. the history and development of the tool;
2. the intended goal of the tool
3. how the tool's platform operates;
4. the strengths and weaknesses of the tool;
5. assessments of the navigation, appearance, and accessibility of the tool;
6. the costs and available IT support for the tool;
7. a walk-through of an example project that uses the tool.

Unfortunately, some factors are difficult to include in the methodology due to the lack of data transparency, such as the number or demographic characteristics of participants reached. Without the data, it is difficult to quantitatively measure or rank these tools. Without data transparency among all tool developers, the field is not accountable to ensuring tools reach the groups traditionally underrepresented. Instead, planners using the tools must make sure they use the right tool to reach those groups.

Because planners are not experts in online communication, they are limited to the tools that currently exist which may not satisfy all their needs. This has allowed for tool developers to focus more on the marketing side of tool development rather than creating strong tools. Ideally, tool developers should work with clients to make a highly customizable tool that will allow the planners to engage a more representative group of the community with the limited resources they have.

Know your Audience

When choosing a tool for an engagement process the audience must be understood¹⁵. A tool has the ability to reach a wide audience, but it will be more successful if deployed mindful of the audience. For example, a planning process for a neighborhood versus a should use different engagement tools¹⁶. The neighborhood processes may lead to consensus building while the regional process may attempt to address concerns about impacts. Smaller audiences might benefit from tools that use message boards where participants can provide more detailed feedback, whereas if a larger audience did the same it could result in too much data for a planner to analyze.

Customization and Usability

Highly customizable tools allow for planners to use tools at different stages of the engagement process, using tools more iteratively. For example, some tools may be better at collecting data about community members' ideas about the type of development a community might be considering in the earlier stages, while a different tool might be best for getting

¹⁵ Attygalle, Lisa. Forward: How technology improves community engagement. Engage! 2015. Page 41

¹⁶ Afzalan, N., Sanchez, T., Evans-Cowley, J. (2017). Creating Smarter Cities: Considerations for Selecting Online Participatory Tools, *Cities*, 67, page 25.

feedback on specific details of that development, such as design guidelines at the later stage of a development project.

While customizable tools are useful, simplifying the technology is important in order to engage citizens who may not be as technologically literate. Tools that make it difficult to find information or share comments/give feedback may not have great success. However, making tools user-friendly and providing updated information relevant to the project's current progress, will likely lead to communities appreciating these technologies and becoming more involved in the future.

Registration Requirements

There are ongoing debates about whether having participants sign-in and provide basic personal information will reduce participation, or if it is imperative to data collection¹⁷. While requiring a sign-in to provide addresses or other personal information may prevent participation, complete anonymity will result in not knowing who is participating and may cause issues with spam.

Visual Appearance

MetroQuest, in their guide of best practices for using their tool, stresses visual appearance. They recommend sticking to the seven-second and seven-minute rule that it should take no more than seven seconds to get a user's attention, after which the user's attention will only be retained for seven minutes¹⁸. Tools must therefore be designed to be attention grabbing and concise in the information that they are sharing or seeking. To do this, MetroQuest suggests

¹⁷ Afzalan, N., Sanchez, T., Evans-Cowley, J. (2017). Creating Smarter Cities: Considerations for Selecting Online Participatory Tools, *Cities*, 67, page 27.

¹⁸ Attygalle, Lisa. Forward: How technology improves community engagement. Engage! 2015. Page 41

using more visuals than text, as text takes longer to read and large amounts of text may dissuade a user from figuring out what the project is about¹⁹. Having an appealing design that uses graphics over text will be more successful.

Accessibility

There are several requirements that should be made compatible with tools to make them accessible to everyone. The most important, and frequently incorporated, is language translation. It is important to enable community members to engage using their primary language. Often tools can incorporate Google translate, or a similar product, that automatically translates the text into a language of the user's choice. Similarly, while visuals are often encouraged for grabbing attention, they are also useful to improve understanding for those with poor reading comprehension skills. By using simple phrases, images, or video components, those unable to read well can still be engaged. It is also important for tools to support access for those visually impaired such as text aids for the visual impaired. Incorporating these considerations in tool platforms will encourage more community members to engage, especially those who often feel left out.

Evaluating Data

It is imperative that community engagement tools are chosen based on their ability to analyze, report, and export data, as well their functionality in the engagement process. Evaluating data allows for planners to compare data they receive. In cases where the engagement process is asking users to rank their priorities or budget allocations, tools should be able to evaluate the data and provide those ranked results to the planners.

¹⁹ Public Involvement Software User Guide. MetroQuest. Page 5

Displaying Data

Similarly, it is helpful when tools can allow planners to easily create maps and graphs of the data or export data to use in the planning process. The ultimate goal of online engagement tools is to allow the community to provide feedback to be used in planning. If the data is ignored, then there is little point in using the tools.

Online Engagement Technology Case Studies

Based on these best practices for online engagement tools, the following sections examine three case studies, analyzing what makes these tools successful or unsuccessful. Based on these case studies, the final methodology will be developed and applied to all the selected tools in the user guide.

CoUrbanize

CoUrbanize is a platform that allows developers and planners to create and manage their own online project page by allowing them to send updates, provide information and give community members the opportunity to add ideas, make comments, or ask questions. The tool is targeted to a number of clients, although it is mostly designed for private development projects rather than community planning. However, there are several projects led by councils of government for urban development using the tool.

CoUrbanize was developed by a team from MIT's School of Architecture and Planning and founded at TechStars, a Boston based start-up/accelerator program. They developed the tool to bring technology into the field of real estate development, urban planning, and construction, realizing these professionals didn't have the resources to reach a broader and more representative audience online. Their goal is to: (1) make project information easy to share,

understand, and comment on; (2) and to help residents voice their opinions; and (3) helping developers stop misinformation from being circulated.

The tool works by giving developers access to a self-serve platform to create a project page, and also provides assistance by driving traffic to the page via email, social media, physical signs, print mail, and other services. Their flexible platform allows for a different configuration of services for engagement including community forums, interactive mapping, SMS text messaging campaigns, surveying and polling, targeted emailing, sentimental analysis, civic engagement, permitting and entitlement strategy, construction communication, social media and content creation. While the tool has a wide range of services that it offers, the project page template is consistent across projects, allowing users to easily become familiar with the CoUrbanize platform.

The screenshot shows the CoUrbanize platform interface. At the top, the CoUrbanize logo is on the left, and navigation links for 'Explore Projects', 'How It Works', and a user profile 'Sarah' are on the right. The main content area features a large image of the Kendall Square building at MIT at night. To the right of the image, the project title 'Kendall Square at MIT' is displayed, followed by the location 'CAMBRIDGE, MA' and a description: 'Official construction updates during the creation of 1 million square feet of new space in Kendall Square.' Below this, the developer 'MIT' is listed with their logo. A green button labeled 'Comment on this project' is present, along with 'Follow' and 'Share' buttons. At the bottom, a navigation bar contains five icons with corresponding labels: 'PHASE CONSTRUCTION', 'OPEN SPACE OVER 1.8 ACRES', 'RETAIL 115,000 SQ FT', 'OFFICE / R&D 888,000 SQ FT', and 'RESIDENTIAL 450 GRAD & 290 OTHER'.

Figure 1 - CoUrbanize Project Page for Kendall Square at MIT Project

Each project page opens to a homepage that shows a slideshow of images including renderings, site plans, and current conditions, along with information about the project and the developer. Here, participants can easily learn what type of project it is and what the development includes (uses and scale). Options to “comment on this page,” “follow,” or “share” the project page are also provided. This information (Figure 1) remains at the top of the page as participants explore the rest of the project website. Below this title section, developers have the option to choose the type of information tabs they want to include such as info, updates, timelines, comments, FAQs, and other page types. These tabs work as a way to organize the information the developer deems important to share, without making the page too cluttered. The info tab can include more detailed information about the project such as the reasons for the development, how it will affect the community, where the project currently is in the process, who is involved in the project (architects, consultants, etc.), maps of the project area, plans and documents, and anything else that doesn’t fit into other information tabs.

The info tab is the most likely to become content heavy, but is arguably the most important tab for the project page as it is the first one participants will see. Thus, it must be structured well to introduce the participant to the project and make them interested in continuing to use the tool, rather than overwhelming them. The updates tab works similar to a blog format, allowing developers to create short posts that show the page is being updated with information regularly. The timeline tab provides a glimpse at important milestones for the project in the past and future, including events that participants could attend such as public hearings or community meetings. The timeline is formatted in a way that the most recent events are placed at the top of the tab and participants can scroll down to see events that have occurred. The FAQ

tab allows for developers to anticipate or respond to commonly asked questions about the project and make their stance on the project clear.

The process for public participation on CoUrbanize is handled through the comments tab where the developer has the option to create a poll or survey that will allow them to collect specific information. The survey structure is flexible allowing for open-ended or multiple-choice questions. Often these surveys will ask on average four targeted questions in order to keep the

INFO

UPDATES 40

TIMELINE

COMMENTS 92

FAQS

Share

Follow

<

General

>

Construction has started. Have questions or comments about the project or ongoing work? Share them here.

I think...

0 / 250 words

Skip

Submit

Participation on coUrbanize is subject to our [Community Guidelines](#).

Sort by:

Most popular

Category:

All



Summer Jackson

Jun 12, 2017

Install a stop sign at Amherst and Wadsworth

Given the new traffic pattern from construction, a stop sign should be installed on the corner of Amherst and Wadsworth so that cars don't careen around the corner and endanger pedestrians.

SUPPORT

5 SUPPORTERS

FLAG

Share



MIT

Jun 13, 2017

Summer, thank you for sharing your thoughts with us. The Project Team looked at this yesterday and we think there is cause for installing a stop sign at the corner of Amherst and Wadsworth. The current... [Read more](#)

SUPPORT

NO SUPPORTERS YET

FLAG

Share

Figure 2 - CoUrbanize Comments Tab for Kendall Square at MIT Project

survey short and increase the likelihood of participants completing it. Below the survey, participants have an option to post a comment on a message board, which is viewable to the public. Each post includes the participants name, the date they posted the comment, and the options to “support,” “flag,” or “share.” Supporting the comment is similar to “liking” a post on Facebook, indicating that other participants on the page support the comment that is being made. Flagging the post allows participants to report the comment if they think it is inappropriate. Sharing the post gives the participant a link to share it to other social media platforms such as Facebook, Twitter, Google plus, or email. Both participants and the developer are able to comment on a post, allowing for a two-way conversation (figure 2). Posts can be sorted by newest or by popularity, which brings posts that have been supported the most to the top.

In order to participate in the survey, post a comment, comment on posts, or flag posts, participants must be logged into CoUrbanize. If you are not logged-in, you will be prompted to log in or make an account. A sign-up screen will pop up giving the participant the option to sign up with Facebook, Google plus, or email. Doing this provides CoUrbanize with your first and last name and your email. When filling out the information, there is a prompt that reads “Full first or last name required. Please use your real name :)”. If a participant does not wish to use their last name, they have the option to use their last initial instead. While the first and last name are required, participants also have the option to add a profile picture that is visible to anyone, as well as their zip code which is not visible. By adding a zip code, participants can opt into getting notifications about new nearby projects that create a CoUrbanize project page.

Critique

CoUrbanize has several strengths that make it a successful platform for engagement: the biggest strength being that neither CoUrbanize staff, nor the developers creating the project page, can hide posts on the comments tab. They report that they “never hide, edit, or delete comments that comply with guidelines, and [won’t] mess with their popularity ranking.” This means that comments that have a negative attitude towards the project cannot be removed or hidden at the bottom of a message board, making it appear trustworthy to community participants. The tool also incorporates several capabilities, such as including the Google translate integration that give a choice of 18 languages; using Mapbox for information map graphics (widely used among websites making it familiar to participants); and optimizing the platform to be viewed on mobile devices and other small screens. By ensuring that participants can access the tool easily and view the information in ways that are familiar to them, the tool can be very successful in reaching more participants. The tool’s simplified layout for all projects also makes it successful as a tool that participants can become comfortable with using, perhaps increasing their willingness to participate in other projects that use CoUrbanize.

However, there is debate among those in the engagement technology field that having to log-on to a website to participate, especially to leave public comments, will discourage many from doing so. For projects that are highly contested, members of the community might not want others to know their opinions, or want to post on a message board where their comments can be tracked back to them. In order to ensure that messages aren’t spam, and to better collect data on who is participating, requiring participants to log-in or provide basic information can help the developer to know who is involved, and who isn’t, so they can better engage their audience. For

the sake of this research, having to log-in to a tool will be considered a weakness of the tool, whereas only having to provide your name or other basic information as part of a survey will not. This is to account for tools that create barriers to participation, which are deemed less successful for community engagement.

CoUrbanize also has a couple of other limiting factors in their tool design, including the project page standardized template. Having a standard template that all project pages must use is helpful to become familiar with the platform; however, it limits the type of projects that this tool can accommodate, specifically in its community engagement capabilities. With only two options to engage the public, a brief survey or via comments, the type of engagement that can be done is seriously limited. Community members may be less inclined to use a product that allows them very little opportunity to engage and therefore may only use the tool for information, not to provide input. There is clearly a balance needed between the tool's platform being familiar to all users and allowing for customization so that developers and planners can use the tool to best fit the engagement process. Tools that limit customization for their engagement strategies, for this research, will be considered as less effective for these reasons.

CoUrbanize states that their partners are “building better projects faster” by using the platform, and as an engagement tool it is successful in sharing information and responding to questions or concerns faster and for less money than they would at traditional meeting. The cost for CoUrbanize varies from \$1,500-\$75,000 per project, based on the type of support that a project will need, such as advertising, analysis, and strategy planning. As a company, CoUrbanize seems to be very successful in reaching communities for these development projects and helping developers to navigate these community engagement processes. But the tool seems to be doing

only that, helping developers to more easily have a community engagement process used for project framing. So while the tool is well designed and has great features, its capabilities when it comes to deepening community engagement through the design of engagement opportunities are lacking. Instead of having multiple ways for the community to provide feedback, the tool is more successful at providing information. That isn't to say that CoUrbanize shouldn't be considered for use in the community engagement process, as it could do well as one tool in a toolkit used during the process. But in terms of collecting meaningful community feedback, this tool isn't as successful.

MetroQuest

MetroQuest is a public engagement software tool that works to maximize the number and span of participants, and collect informed and actionable public input. The tool is different from CoUrbanize in that instead of building a project page to share information, MetroQuest works as an online survey collecting targeted information to be used in the development of a project. The platform is targeted for planning and government agencies to use during community engagement processes. MetroQuest has been used by many large agencies and consulting firms across the country, making it one of the leading online engagement tools on the market.

MetroQuest was developed from a large, interdisciplinary research project at the University of British Columbia that had been intended to serve two functions: “leverage back-casting to help foster understanding of the sustainability of regional growth, and provide a vehicle for researching the effectiveness and utility of such tools and techniques.”²⁰ Since then,

²⁰ Walsh, M., & Burch, S. (2012). Communities at the crossroads: Using metro quest to help communities create consensus around a vision of the future. In L. Bazzanella, et al. (Eds.), *The Future of cities and regions* (pp. 45– 64). Dordrecht: Springer Netherlands.

MetroQuest has been commercialized by Envision Sustainability Tools. Founded by Dave Biggs and Mike Walsh, members of the original research team, to address the needs of urban and regional planners in developing long-range plans, MetroQuest has been designed to educate and engage stakeholders, helping them to grapple with the complexities of thinking about sustainability in the context of a region, and then motivating them to get involved in the planning process. While the tool is certainly still useful in long-range planning, it has evolved to doing all sorts of planning projects.

All MetroQuest projects work the same. A planner will use the MetroQuest dashboard to set-up an engagement site and launch it to the public. The dashboard is then used to watch data come in, as well as to analyze and report on all the public input. From the participants' view, MetroQuest is a project survey that contains a series of four to five standardized screens that guide the participant through the process of learning about the project and providing input. The planner has a wide range of screen types to choose from that can be easily mixed and matched to suit the engagement need of the development project. Figure 3 shows a list of all the standardized screens that can be combined to make up the survey.

- 1. Welcome**
- 2. Wrap up**
- 3. Priority ranking**
- 4. Scenario rating**
- 5. Visual preference**
- 6. Image rating**
- 7. Map marker**
- 8. Project selection**
- 9. Budget allocation**
- 10. Funding balance**
- 11. Vision statement**
- 12. Tradeoffs**
- 13. Strategy rating**
- 14. Standard survey**

Figure 3 - List of MetroQuest Screen Options

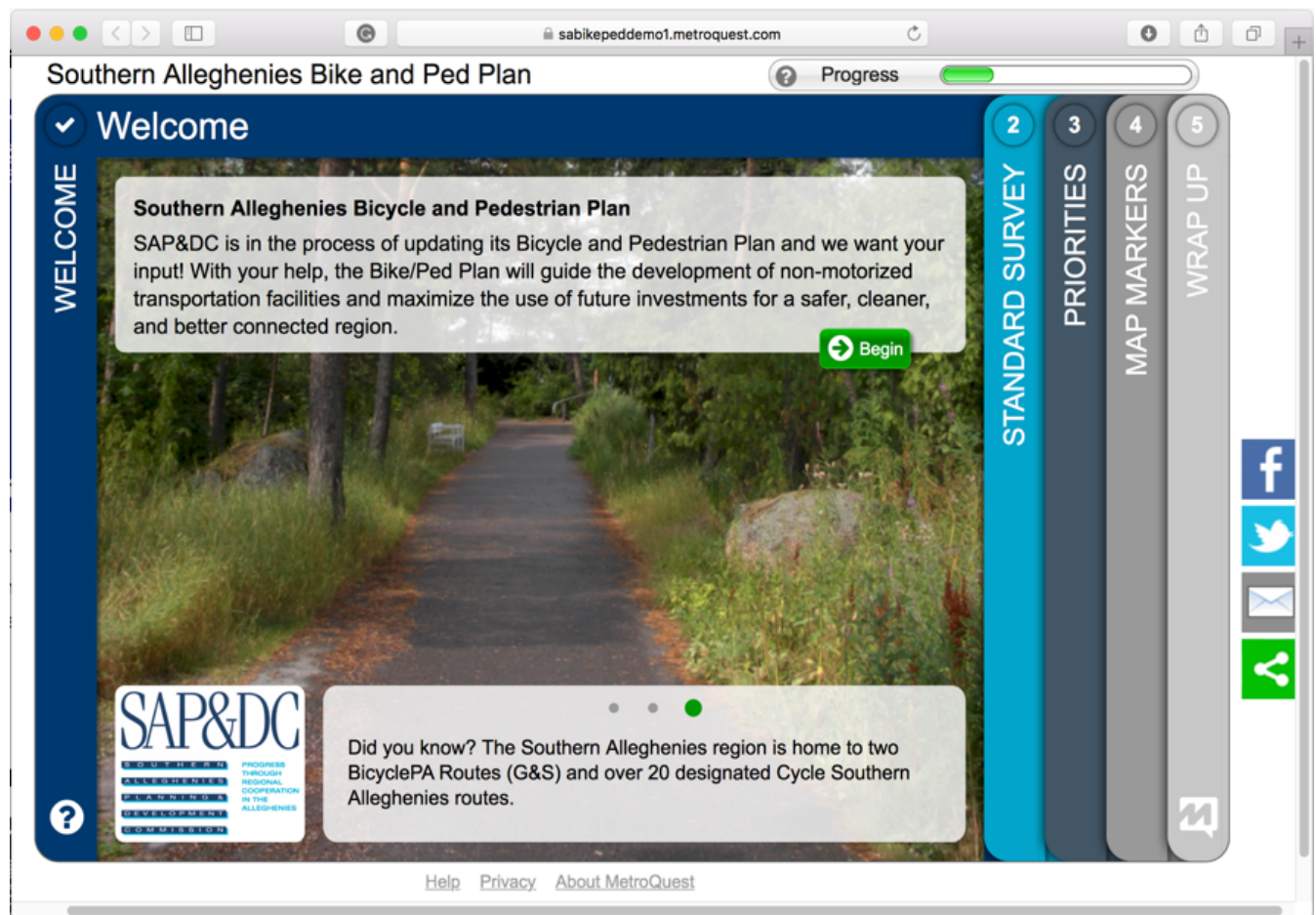


Figure 4 - MetroQuest Project Page, Southern Alleghenies Bike and Ped Plan

Each project survey starts with a “Welcome” screen that opens to a window asking participants to take a moment to respond to the survey (Figure 4). The welcome screen could include details such as the title of the project, the agency sponsoring the survey, basic information about the project, or why they are asking for survey data. At the top right hand corner, a progress bar indicates how far along they are in taking the survey. At the bottom left of each screen there is a “?” button, that when clicked brings up a pop-up screen that includes: a help tab explaining “what should I do?” “when is my input collected?” and “what happens to my input?”; a privacy tab that explains MetroQuest’s privacy policy; and an about MetroQuest tab, which gives information about the tool. These tabs are also located right below the survey screen

as text options. On the right of the screen there are four buttons that allow participants to share the survey via Facebook, Twitter, email, or ShareThis.

To continue from the welcome screen to the next screen on the survey, the participant must click on the second vertical bar on the right, which will say the name of the next screen, such as “standard survey” or “map markers.” They also can click on the button in the right upper hand corner that says “next task.” Each time a new screen is opened, a dialogue box will open to explain what the participant should do on that screen. If the participant needs a reminder of what to do on each page, there is a “? what to do” button next to the task button that will reopen the initial dialogue box for that screen. At the end of each project survey there will be either a “final questions”, “stay involved”, or “wrap up screen” which will denote the end of the survey and thank the participant for their time. While participants are not required to sign-in, the wrap-up screen allows for the collection of demographic information and can ask for name, age, gender, email, and if they would like to stay involved via email.

Critique

While the MetroQuest platform is static in that it will always have four to five standardized screens, the tool is highly customizable for specific types of engagement projects. The fourteen different screen types allow for planners to get very specific data from the community in a way that is easy to analyze and report on. This makes the tool very feature rich, giving planners the flexibility to use the tool at different stages of the planning process. For example, planners could use the map marker and project selection tool at the beginning of the project development to decide on what kind of project to do and where it should be. Then later, they can have another

MetroQuest survey for visual preference, budget allocation, and image rating to decide what the project should look like and how much it should cost.

MetroQuest also has written several blog posts and their CEO Dave Biggs gives information product marketing talks often, putting them ahead of the curve on the best practices for tool use. These resources help planners to make the most of the tool, guiding them in building a successful survey. As part of the product package, planners receive IT support and training. MetroQuest claims that they have tools and techniques to identify and help mitigate ballot stuffing in order to protect the integrity of the data results. While the visual appearance of MetroQuest is clearly dated compared to other modern engagement tools, the tool always looks the same across different projects, making the participant familiar with the tool.

In addition to the outdated appearance of the platform, MetroQuest also has the disadvantage of not being able to be embedded into a project page. This means that in order to find the survey, one must have the link or follow the link from the project website possibly resulting in participants not seeing it right away, or missing it entirely if the project website is poorly designed or not advertised well. The tool also has no social component, as it is solely for data collection. If a participant has a question about the project, they could not use MetroQuest to ask that question or to get an answer to it. The community in general will have no idea if the survey is being well used, or how others in their community are responding. This factor makes it crucial that MetroQuest be used in conjunction with in-person meetings, so that the community can still ask questions and be able to know what others are thinking.

MetroQuest makes it very easy for planners to provide information and to collect meaningful data to be used in the planning process. The company has worked hard to give

planners the resources they need to create successful surveys, while sharing best practices and providing support. The tool has also been considered to be a cost savings to agencies. At \$4,000 per month, with options for a discount on volume pricing, the cost when considering the number of participants can be significantly lower than the cost of in-person engagement. The Nashville Metro Planning Commission found that the cost of their comprehensive planning project using MetroQuest was \$3 per participant, compared to \$47 per participant for in-person engagement events²¹. The tool seems to have an excellent balance of customization, allowing planners to create a survey that fits their engagement process, while also remaining familiar to participants across different projects. As it is already widely used, MetroQuest is a very successful tool in improving community engagement processes. However, additional research on just how successful the projects tend to be, especially in knowing the audiences that they reach, and if those audiences are well represented by all groups in the community, would improve analysis of their product.

EngagingPlans

Part of the Urban Interactive Studio (UIS) that specializes in public engagement software and consulting for public administration, planning, architecture, and engineering firms, EngagingPlans is an online engagement tool that provides interactive project website pages to help project teams effectively reach communities, share news and updates, and gather community input through a range of services. The platform allows for planners to create customizable project websites that can include various tools to share information and collect

²¹ MetroQuest, Nashville Wins an APA Daniel Burnham Award

data based on the design of the community engagement process. They have a broad range of clients, including public and private sectors, due to the tool's customization ability of the tool that makes it useful for any type of project incorporating public involvement. UIS is a Denver-based cross-disciplinary team of planners, designers, and web developers. Its founder, Chris Haller, has been involved in facilitating stakeholder engagement since 2002 and has an education background in city and regional planning.²²

EngagingPlans is a tool targeted for planning agencies that don't have the staff capacity to build a project website. It is similar to other common website creation software, such as WordPress or Squarespace, except that is specifically designed for projects that involve community engagement.

No two project websites on EngagingPlans look the same, as they are completely customizable. By using EngagingPlans, planners have access to the EngagingPlans App Suite of intuitive tools designed to make complex information easily accessible to citizens, giving them power as they explore information and provide feedback on projects. For sharing information there are features such as new updates, event timelines, document libraries, FAQs, email subscriptions, social media links, and image gallery. To collect input, planners can deploy idea walls, discussion & comment sections, surveys, polls and instant results, and draft document review. EngagingPlans also offers tools to curate and evaluate data by using content management systems, report builders and data exports, comment moderation options, and spam filters. Because of this complete customizability, it can be very difficult to analyze whether EngagingPlans can be an effective tool for every case.

²² Chris Haller, LinkedIn.com

Critique

As the platform is highly flexible to fit the needs of the project, the tool is built around the engagement process, rather than making the engagement process fit the tool. In order to do this however, planners must know exactly what they want, which may be difficult if they are given too many choices. EngagingPlans does offer IT support and training, therefore they can help clients build their project websites based on best practices for website design. This helps to make project pages more visually appealing. The tool is also highly feature-rich, with maps and surveys offering many different topics for the types of data that can be collected. However, with too many options, websites can become overwhelming for the participant making them unsure of where to start to look for information.

One example of this is the project for the Downtown Master Plan for Toledo, Ohio²³. The home page for this project has a grid of posts, all containing different types of information that do not seem to be arranged in any sort of order. The website also has tabs at the top of the page indicating sections for home, project, team, events, participate, gallery, and contact us. However, as participants hover over each link to that tab, a drop down menu appears for even more pages that must be selected to find information. All these choices, and the seemingly unorganized nature of this website, are not appealing to community members who may become overwhelmed by all the information and frustrated when they can't make sense of it.

Some pages are well organized though, such as the Facility Master Plan for the Denver Zoo²⁴. This project website is a single page, and as participants scroll down they start to

²³ <http://downtowntoledoplan.com>

²⁴ <http://denverzoomasterplan.org/facility-master-plan-community-feedback>

understand what the project is, why it is important, and how the community can help. The page includes photos and graphics that are eye catching to break up large amounts of text. As participants scroll through the page they are not overwhelmed with information, but instead find sections that are much easier to digest. At the end, there is a brief survey that asks participants to rank five priority choices and then asks for the participant's zip code with an option to include their name and email. This project pages shows the importance of process design and how information is shared in order to capture the attention of an audience.

Another weakness to EngagingPlans is that planners are able to moderate comments, giving them the option to proactively review and approve comments before they are live on the site. If planners prevent negative comments from getting onto the site, it can lead to public mistrust if the public believes their comments are being censored. This practice is generally frowned upon for online engagement tools because it creates a major barrier between those running the engagement process and those who are participating. This is not the standard setting for comment pages however, so it is the responsibility of the planner or developer to choose whether to use this option or not.

EngagingPlans is certainly useful as an engagement tool as it increases the capacity of agencies unable to create effective project websites, and it has the ability to include opportunities that allow for the community to participate. However, as a tool it does not always encourage engagement, and some projects don't include opportunities for engagement at all. This tool can be used by agencies that know the type of tools that they wish to use, but are unable to create the website themselves. However, it may not be the best tool for agencies that are unclear on how to start an online engagement process.

User Guide Development – Catalogue of Online Engagement Tools

These three tools, CoUrbanize, MetroQuest, and EngagingPlans, were all developed as online engagement tools that share important project information as well as encourage community participation. However, the three tools have very different functionalities giving them very different strengths, weaknesses, and effectiveness in community engagement. While CoUrbanize offers a standard format that allows for familiarity along community projects and provides coherent project information, it lacks in-depth community engagement and may be more useful for project framing. MetroQuest has a highly customizable platform that remains within a standard framework and has excellent data collection capabilities, yet the appearance is outdated and it cannot stand alone in a community engagement process. EngagingPlans increases an agency's capacity to build project websites, yet the highly customizable nature makes it a tool not recommended for agencies that need more guidance in online engagement opportunities. This is not to say that any of these tools are bad or not recommended for use. Rather it supports the argument that of all the online engagement tools that exist, each has very different capabilities that planners should understand before selecting one.

The conclusions from these case studies support three important areas to consider when analyzing all the engagement tools for this project's user guide:

1. Customization and standardization must be well balanced, as they have trade-offs to successful and continuous engagement among communities. Standardization will allow participants to be familiar with the tools in future projects, making them more likely to

participate; however, customization allows for agencies to design the tools around the engagement process, rather than making the engagement fit the tool.

2. Engagement opportunities are as important as project information. A project page can have a lot of great information to frame a project, but if it misses opportunities for the community to give feedback and otherwise be engaged with the project, then it is not successful as an online engagement tool.
3. Navigation and appearance of a tool must be well designed in order to engage with participants and not create barriers to participation. Tools that are unorganized, text heavy, or are difficult to navigate will prevent participants from using the site and discourage them from getting involved in the project.

These three points will be considered in the methodology of analysis for the User Guide of Online Engagement Tools. By analyzing several important aspects of tool development and providing them to agencies, the user guide will aid those intending to use engagement tools to find the one that best fits their community engagement process needs.

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User Guide of Online Community Engagement Tools

Introduction

This User Guide for Online Community Engagement Tools has been developed for practitioners hoping to utilize these tools to enhance their community engagement processes. The following sections outline the terms and methodology categories that were used to describe and organize the tools.

There are five groups of tools: surveys, website builders, budget simulators, message boards, and mappings. Each grouping contains a chart for each tool that outlines the analysis of that tool. It is recommended that practitioners take time to think about the type of information they hope to gather through the community engagement process and then decide the type of tool that will best help them collect that information.

This analysis emphasizes opportunities for engagement, and therefore tools were selected based on the quality of their engagement abilities. Each tool has different strengths and weaknesses that should be considered when deciding among them. Practitioners should also consider the best practices outlined in the research that accompanies this user guide.

Terms

Developer: The developer of the online engagement tool

Online Engagement Tool: A SaaS product (software as a service) that is viewable on the internet, helps agencies collaborate with the public in a planning process, and enables members of the public to participate in the online platform.

Participant: Member of the community that will engage with the online engagement tool

User: Planner or Staff Member who is deploying the online engagement tool

Methodology Categories

The following table outlines the criteria that will be used to assess each tool. The tools will then be sorted into different groupings based on their uses (survey, website builder, etc). This process will allow for users to easily follow the guide to choose the group of tools they need for their engagement process, and then pick the best tool for their needs. The following sections outline each of the analysis provided for each category.

<i>Metric</i>	<i>Analysis</i>
Use/Purpose	Brief One-Sentence Description
Interaction/Engagement Opportunities	Quantitative list/description of opportunities (survey, poll, etc.)
Appearance/Organization	Ranking (Graphic Heavy, Equal Mix, Text Heavy)
User Set-up	Ranking (Standardized, Equal Mix, Customizable)
Relevance/Updated Information	Measure of time (daily, weekly, monthly, etc.)
Supports Multiple Languages	Yes/No - Number/list of languages supported
Strengths	Quantitative list
Weaknesses	Quantitative list
Costs	Dollar Value
Available IT Support	Yes/No - Type/Costs associated
Training	Yes/No - Type/Costs associated

Use/Purpose

A concise one-sentence description of the tool's main purpose is provided to allow the user to easily understand how it should be used and what its capabilities are. For example, the sentence will include the type of platform the tool uses (website, survey, mapping, message board) and explain the mission of the tool, such as to maximize participants, collect information, create data graphics, etc. This sentence is based on the tool's mission and vision statements, marketing

information, and through analyzing the strengths and weaknesses of the tool. This category is listed first so that users can easily determine if this tool should be considered further.

Interaction/Engagement Opportunities

Interaction and engagement opportunities will consider the number and breadth of engagement opportunities. It will include a list or description of each way that participants can engage with the project through the tool, as well as give feedback through data collection and analysis.

Appearance/Organization

Based on best practices for development of online engagement tools, successful tools have more graphics than text in order to better engage with participants. This category will use three qualitative measures to assess the tools: “Graphic Heavy, Equal Mix of graphics and text, or Text Heavy.” Tools that are graphic heavy will be ranked higher, followed by equal mix, and then text heavy.

User Set-up

This category will consider whether the tool uses a more standardized platform, a more customizable platform, or a mix of both. This will not affect the ranking of the tool, as it is up to the user to determine whether they want a tool that is more standardized or customizable, based on the trade-offs that are considered in best practices for online engagement tool development. If necessary, user setup will be explained further in either the strengths or weaknesses category.

Support Multiple Languages

This category will either answer yes or no, and if known, will include the number of languages that are available for each tool as well as the translation plug-in available (Google translate, etc.)

Strengths and Weaknesses

These two categories will contain a list of the most important strengths and weaknesses of each tool. This category will allow for an explanation of the ease of navigation, interaction/engagement opportunities, appearance/organization, and relevance/updated information categories. This section will not contribute to the ranking of each tool, but will give further detail on the use of the tool.

Costs

Quantitative data on the cost of the tool, and if available, what is included in that cost.

Available IT Support

Yes or no answer and, if available, further detail on what is included.

Training

Yes or no answer and, if available, further detail on what is included.

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Survey Tools

The following tools are used to create surveys or polls that will be used to collect data from participants. Other popular survey tools that are not included in this guide include websites such as SurveyMonkey and Qualtrics.

MetroQuest	Analysis
Use/Purpose	Public involvement software that enables users to maximize the number and breadth of participants, collect informed and actionable public input, and build greater community support through interactive surveys.
Interaction/Engagement Opportunities	Screens: welcome, wrap up, priority ranking, scenario rating, visual preference, image rating, map marker, project selection, budget allocation, funding balance, vision statement, tradeoffs, strategy rating, standard survey
Appearance/Organization	Equal Mix
User Set-up	Equal Mix
Supports Multiple Languages	Yes
Strengths	• Feature rich • No sign-in required with still collecting demographic data • Optimized for mobile/small screens
Weaknesses	• Not a flexible, scalable project website publishing tool • No social media integration
Costs	\$4,000/month (\$12,000 per 3-month project) Discount for volume pricing (ex. 6 projects \$40,000)
Available IT Support	Yes
Training	Yes, Provides Guide Book
Example	http://metroquest.com/how-it-works/

All Our Ideas	Analysis
Use/Purpose	Creates a "wiki survey" website to allow for participants to vote on ideas and add their own. The tool easily collects the data, transparent to the participants, and allows for users to integrate the results into the planning process
Interaction/Engagement Opportunities	Participants vote between choices on a given topic and add their own choices. Choices are moderated, then appear as a choice for other participants to vote on.
Appearance/Organization	Text Heavy
User Set-up	Standardized
Supports Multiple Languages	Yes - 16
Strengths	• Participants can add their own choices • Simple to set up, and simple to use • Participants can see the results instantly
Weaknesses	• No inclusion or wrap-up information which could leave participants uncertain of the next steps • Very little description of what is being done/no context • No control over the survey because of the nature of open ended questions/answers
Costs	Free to use
Available IT Support	N/A
Training	N/A
Example	http://allourideas.org/planyc_example?guides=true

Interactive Text	Analysis
Use/Purpose	Collect representative feedback to build a shared vision for the future or improve existing processes. Track participants over time, so programs can improve and grow. Send messages when it counts. Bite-sized education and real-time exercises work better for busy lives. Get people signed up on the spot and send reminders by text. Close the gap between interest and participation.
Interaction/Engagement Opportunities	Send text messages, participants respond to the text message
Appearance/Organization	Text Heavy
User Set-up	Standardized
Supports Multiple Languages	N/A
Strengths	• Can customize to collect the data needed with multiple question types, built-in logic, custom area codes, etc. • Can be used at any time, during meetings or before/after
Weaknesses	• Does not collect demographic data unless that is the question being asked
Costs	Not Publicly Available
Available IT Support	Yes
Training	Yes
Example	https://www.textizen.com/welcome

Codigital	Analysis
Use/Purpose	Ask an open question and have participants submit an answer, or take an existing answer and try to improve it with modifications.
Interaction/Engagement Opportunities	Participants can vote on ideas, edit ideas, or add their own ideas. Pairs of answers are shown to participants and each time they are asked to pick the one they prefer, ranking the preference of answers.
Appearance/Organization	Text Heavy
User Set-up	Standardized
Supports Multiple Languages	N/A
Strengths	• Allows for participants to be flexible in their responses (open ended answers) • Simple platform that is easy to navigate • Prioritizes responses as participants vote, making it easy for data analysis and incorporation into plans
Weaknesses	• No project context or information given to explain the purpose of the survey within the tool • No control over the survey as answers are open ended • Text heavy • No conclusion or wrap-up information included
Costs	Free for up to 50 participants with one project at a time. Corporate rates for unlimited participants and unlimited projects are not publicly available
Available IT Support	N/A
Training	N/A
Example	http://cd.codigital.com/p/planet

Website Building Tools

The following tools are used to create websites for community engagement projects. Other popular website building tools that are not included in this guide include Squarespace, Wix, and Wordpress.

CoUrbanize	<i>Analysis</i>
Use/Purpose	Creates an online home for real estate development and city/town planning projects. Users post updates and host online conversations about their plans with participants
Interaction/Engagement Opportunities	Suggestions/Ask questions in comments section. Receive responses from the project team. “Support” option on comments; “Follow” option to receive project updates by email; Surveying/polling/interactive mapping; Timeline of project/team updates; Social media and content creation
Appearance/Organization	Text Heavy
User Set-up	Standardized
Supports Multiple Languages	Yes – 18 languages supported
Strengths	• No hiding of comments from project team • Map has layers/legends (nice Mapbox integration) • Optimized for mobile/small screens
Weaknesses	• No anonymity. No private messaging • Project page is not configurable • Limited event functionality
Costs	Variable (\$1,500-\$75,000 per project)
Available IT Support	N/A
Training	N/A
Example	https://courbanize.com/projects/theladybird/information

Neighborland	Analysis
Use/Purpose	Designed to host projects online, listen to stakeholders, integrate online and offline engagement, accept donations, conduct simple surveys, and report back on impact. The mission is to empower people to shape the development of their neighborhoods
Interaction/Engagement Opportunities	Surveys, ideation, up voting, commenting, prioritizations, mapping, scenarios, donations
Appearance/Organization	Equal Mix
User Set-up	Equal Mix
Supports Multiple Languages	Yes - google translate
Strengths	• Feature rich (many different ways for engagement) • Google analytics integration for reporting • Compatible on all device types • Template-based layout options that meet specific project needs
Weaknesses	• Long scrolling pages could become overwhelming with too much text • Have to sign-in (option to allow anonymous users)
Costs	\$1000+/month
Available IT Support	Additional fee
Training	Help text built into admin view, how to videos available to partners are free. Hands on training has additional fee
Example	https://neighborland.com/stadiumneighborhoods/about

Bang the Table/ EngagementHQ	<i>Analysis</i>
Use/Purpose	Uses the EngagmentHQ suite of tools for designing websites to collect data and report information, and listen citizens' to the concerns of citizens. Used by town governments to share multiple ongoing projects in one place and allows for different engagement strategies for each project.
Interaction/Engagement Opportunities	Engagement tools include: Mapping surveying, "virtual" post it notes for ideas, surveys, forums, questions, guest books, and polls Information and reporting tools include: participant relationship management, e-newsletters, social platforms, blogs, informational widgets, levels of visibility; data insights, data summary reports, demographic breakdown, comment analysis, exportable formats and charts
Appearance/Organization	Equal Mix
User Set-up	Equal Mix
Supports Multiple Languages	Yes - can create separate website for different languages, or use the google translate widget
Strengths	• "Home page" is very graphic and easy to navigate • Each project can be treated differently, with its own ways to engage or give information/updates • Project pages across the board are standardized
Weaknesses	• Requires sign-up in order to participate; however, you do not have to share personal details when you participate • Project pages can be very text heavy • Difficult to understand ways to engage immediately
Costs	Not Publicly Available
Available IT Support	Yes
Training	Yes
Example	https://letstalk.niagarafalls.ca

EngagingPlans	Analysis
Use/Purpose	Part of the Urban Interactive Studio – allows for project teams to build a project website that includes tools for sharing information and collecting feedback
Interaction/Engagement Opportunities	Sharing information (news updates, timeline, document library, FAQs, email subscription, image gallery); collecting input (idea wall, discussion & comments, surveys & polls, draft document review); evaluate (content management system, report rebuild & data exports, comment moderation options, built in SPAM filter, help desk)
Appearance/Organization	Text Heavy
User Set-up	Customizable
Supports Multiple Languages	Yes - Google Translate
Strengths	• Highly flexible • Feature-rich
Weaknesses	• Comments can be hidden/moderated • No social layer • No consistency among projects
Costs	Variable: \$1,000-\$20,000/project
Available IT Support	Yes – Web support only
Training	Yes – \$125/hour
Example	https://abc-zone.com

Citizen Space	<i>Analysis</i>
Use/Purpose	An adaptable system for creating online consultations. Manage all public involvement activity, run online consultations and surveys, and analyze and report back on findings. Specifically designed with governments for public sector use. (Part of the Delib tool set)
Interaction/Engagement Opportunities	Participants can search for different consultation projects and engagement activity opportunities that an organization has going on. The tool can connect to other engagement tools or use a built-in survey application. The organization can also share important information, summarize consultation results, and provide documents and contextual information.
Appearance/Organization	Text Heavy
User Set-up	Equal Mix
Supports Multiple Languages	Yes
Strengths	• Keeps all engagement opportunities in one location - easy to find • Can link to other tools, allows for multiple ways of engagement • Integrates documents, maps, and contextual information easily
Weaknesses	• Limited in-tool engagement opportunities - only option to create surveys • Can be text heavy depending on management by user
Costs	Not Publicly Available
Available IT Support	Yes
Training	Yes - dedicated support person for each project
Example	https://www.citizenspace.com/info/tour

Crowdbrite	<i>Analysis</i>
Use/Purpose	Communicate plans, build community, prioritize investment, and inspire action through mobile friendly, online tools for comprehensive planning, capital improvements, and other major projects. Has tools for five major planning areas: informing, consulting, involving, collaborating, and empowering.
Interaction/Engagement Opportunities	Audio/video "welcomes" to communicate purpose, goals, and objective; visual surveys; drag & drop idea map; idea/comment cards; progress trackers; online open house; document review; and feedback forms. Also provides resources for enhancing onsite engagement options such as twitter post cards, paper polls, poster boards, workshop supplies, mobile surveys, kiosks, open house kit, digital workshop/charrette kit, and smart tables
Appearance/Organization	Equal Mix
User Set-up	Customizable
Supports Multiple Languages	N/A
Strengths	• Compelling website designs that feature graphics with information overlays • Wide range of engagement opportunities to fit any stage of the engagement process • Layout among project websites remains standard • Strong mobile and social components
Weaknesses	• Project websites can contain too much information • Engagement opportunities not immediately featured, more importance given to information than data collection • Successful deployment of tool depends on guidance from the tool developer team
Costs	Not Publicly Available
Available IT Support	Yes
Training	N/A
Example	http://www.urbanforests.com

Participate.Online	<i>Analysis</i>
Use/Purpose	Project websites designed to mimic a public open house-style meeting. The website sections are topic focused as if participants were at an in-person meeting (tables, booths, boards, organized around a room). Participants can take notes as they read through the information and then submit comments.
Interaction/Engagement Opportunities	Surveys for demographics, Comment submissions, online conversations, mapping comments
Appearance/Organization	Equal Mix
User Set-up	Customizable
Supports Multiple Languages	Yes
Strengths	• Flexible integration with other tools such as mailchimp, vimeo, and suveygizmo within the platform • Don't need to login to participate, very easy to submit comments • Uses google analytics to track data collected
Weaknesses	• Highly customizable format can lead to text heavy project websites • Website is formatted in that you read through many pages of context before getting to make comments (a place to take notes is at bottom of each page however) • Limited engagement opportunities
Costs	\$5000 for single events
Available IT Support	Yes
Training	Yes
Example	https://demo.participate.online

Wejit	Analysis
Use/Purpose	Create a one-page website that collects votes, comments and results
Interaction/Engagement Opportunities	Participants can respond to the topic by selecting one of the topics (poll) or by writing an open ended answer.
Appearance/Organization	Equal Mix
User Set-up	Standardized
Supports Multiple Languages	N/A
Strengths	• Only one page which keeps the project simple • Five different options for the type of engagement to use (open ended answers, yes or no with justification, multiple choice, prioritization, or vote for suggestion) • Can add image, video, and documents to the page
Weaknesses	• Limited to only one type of engagement opportunity per project • Lack of customization • Have to log-in to participate
Costs	Free
Available IT Support	N/A
Training	N/A
Example	http://www.mywej.it.com/#!signin

Budget Simulator Tools

The following tools are used to create budget simulations to collect data on how participants think budgets should be balanced for community engagement processes.

Budget Simulator	Analysis
Use/Purpose	Engage citizens with budgets and inspire insightful response. A digital tool that lets people explore and consider the trade-offs between different combinations of priorities. (Part of the Delib tool set)
Interaction/Engagement Opportunities	Participants adjust sliders on different areas or themes, seeing the effect on items such as like overall budget, tax levels, and consequences for services. Users are presented with total budget and then can adjust spending in key areas until they're satisfied with the overall balance of allocations
Appearance/Organization	Text Heavy
User Set-up	Equal Mix
Supports Multiple Languages	Yes (extra fee to provide)
Strengths	• Shows how budgets can affect participant personally based on demographic information (ex. How the budget will change their property tax rates) • Includes potential consequences to the overall project for each change to the budget • Project pages across the board are standardized, but each project can be customized with graphics
Weaknesses	• May take a while to set up all the information • Text heavy with a high reading comprehension level needed • Not easily embedded into project website - needs to redirect participants to a separate website to use the tool
Costs	Not Publicly Available
Available IT Support	Yes
Training	Yes - Provides a guide online and account manager to help with configuration
Example	https://www.budgetsimulator.com/info/tour

Citizen Budget	Analysis
Use/Purpose	Interactive platform that shows the financial impacts on budget of participants' choices in real time, educating them about the trade-offs and constraints faced by municipalities
Interaction/Engagement Opportunities	Participants make budget choices, answer survey questions, and make comments on selected topics. They also get information about the topics, and can be linked back to the project website/relative project documents to help make their decisions.
Appearance/Organization	Equal Mix
User Set-up	Customizable
Supports Multiple Languages	Yes
Strengths	• Can embed links and graphics into tool to link back to project website • Option to create print versions of budget consultation to reach offline residents • Comment boxes and survey questions included with the budget sliders
Weaknesses	• May take participants a while to answer all questions • Customization can cause an overwhelming amount of information provided to participants • Not visually exciting
Costs	Not Publicly Available
Available IT Support	Yes
Training	Yes - dedicated support person for each project
Example	http://www.citizenbudget.com/index.html

Message Board Tools

The following tools are used to create message boards for community engagement processes that will allow participants to have conversations with each other as well as with the users of the tool. Social media sites have similar capabilities as these tools, however they are not included in this guide.

DialogueApp	Analysis
Use/Purpose	Solve policy challenges with input from participants through constructive conversation online. Dialogue gives users an opportunity to involve communities in the issues that matter to them (Part of the Delib tool set)
Interaction/Engagement Opportunities	Participants can add comments to topics created by the user, comment on other participants posts, and vote on comments. Users are able to respond to comments as well
Appearance/Organization	Text Heavy
User Set-up	Standardized
Supports Multiple Languages	Yes
Strengths	• Very simple platform that is easy to use • Moderation format keeps conversations on track and encourages productive engagement • User dashboard gives headline stats with ability to export data easily • Very simple tool set up with user-friendly admin tools
Weaknesses	• Not visually exciting, no graphics • Lacks space to include context about projects
Costs	Not Publicly Available
Available IT Support	Yes
Training	Yes - dedicated support person for each project
Example	https://www.dialogue-app.com/info/tour

MindMixer	<i>Analysis</i>
Use/Purpose	Creates a project website that allows for users to share project information and receive comments from participants on different topics.
Interaction/Engagement Opportunities	Participants can add ideas in different topic sections, rate others ideas, comment on those ideas, or share through social media.
Appearance/Organization	Text Heavy
User Set-up	Standardized
Supports Multiple Languages	Yes - Google Translate
Strengths	• Has dedicated space to include context about the project • Engagement opportunities are found easily and simple to use • Can choose to receive updates about the project
Weaknesses	• Limited publishing functionality • Have to sign in to participate • Limited space for graphics, making it text heavy and overwhelming on some projects
Costs	• \$3,000/annual for 1 license • \$5,000/annual for 5 licenses
Available IT Support	N/A
Training	N/A
Example	https://www.mindmixer.com

Loomio	<i>Analysis</i>
Use/Purpose	App for collaborative decision-making. Empowers participants to come together, build shared understanding, and agree on a clear course of action.
Interaction/Engagement Opportunities	Participants gather in the Loomio app, start a discussion where everyone in the group can participate, make proposals, and then decide and act by agreeing, abstaining, disagreeing, or blocking the proposal. When participants select their positions they can also enter a short statement to explain why, creating a summary of everyone's thoughts. Also options for polling about topics.
Appearance/Organization	Text Heavy
User Set-up	Standardized
Supports Multiple Languages	Yes
Strengths	• Simple to use • Format makes decision making more efficient • Formatted well for mobile use and integration with other tools
Weaknesses	• Must use email, Google, or Facebook account to log in • Lacks space to include context about projects
Costs	• Free for casual and community groups (one group at a time) • \$19/month for Gold subscription • \$99/month for Pro subscription
Available IT Support	N/A
Training	Online guide
Example	https://www.loomio.org/p/lGcs8zJ5?invitation_token=3ccd3ef5fcc5b002a890

Zilino	Analysis
Use/Purpose	Zilino is a web-based solution for hosting advanced group dialogues. Zilino enables facilitators and other group process practitioners to design, host and manage deliberative online forums and other types of intentional, well-structured, well-facilitated and outcome-oriented participatory processes.
Interaction/Engagement Opportunities	Moderate announcements and group updates, resource sharing and document upload for collaborative learning, whole-group discussion including structure theming, small-group dialogue and breakout sessions including collaborative note taking, polling and voting including rank ordering and range voting, storytelling and story sharing
Appearance/Organization	Equal Mix
User Set-up	Equal Mix
Supports Multiple Languages	N/A
Strengths	• Incorporates several ways for engagement focused around the conversation • Project pages not visually exciting and can become text heavy
Weaknesses	• Must create an account to access any part of the tool • Cannot be embedded into existing project websites
Costs	• Per Project: \$5/participant/month, \$150/facilitator/month • Subscriptions start at \$100/month • Full-service packages range between \$5,000-\$25,000
Available IT Support	N/A
Training	N/A
Example	http://ecastonline.zilino.com

Mapping Tools

The following tools are used to create maps that collect data from participants on various community engagement projects.

Maptionnaire	Analysis
Use/Purpose	Engages participants through mapping to collect survey data. Users make a map-based data collection and can transform the data into tangible insights and develop deeper understanding of the results. Incorporate data collected using Maptionnaires into plans and designs.
Interaction/Engagement Opportunities	Participants answer survey questions, place markers on the map, and add comments.
Appearance/Organization	Equal Mix
User Set-up	Standardized
Supports Multiple Languages	Yes
Strengths	• Gives participants options for types of map to use (Bing satellite or MapBox) • Survey questions start with demographics without requiring a name or email • Different types of survey questions keep participants engaged and interested • How to add markers and comments to the map is well explained and easy to do
Weaknesses	• Cannot see other's responses while adding to the map • Lacks space to include context about the project • Cannot be integrated into an existing project website
Costs	One project can range from \$625-\$2000 depending on the number of months the project is live for • \$250/month for each month over 4 months • \$6251/year for a full annual plan
Available IT Support	Yes - Additional price
Training	Yes - Additional price
Example	https://app.maptionnaire.com/en/2133/

Social Pin Point	Analysis
Use/Purpose	Mapping tool that allows participants to show exactly where their feedback, ideas, and concerns relate to.
Interaction/Engagement Opportunities	Participants can add comments to a map, view others comments, like or dislike other comments
Appearance/Organization	Equal Mix
User Set-up	Standardized
Supports Multiple Languages	N/A
Strengths	• Project set up is quick and simple • Comprehensive data analysis provided by platform • Has a wide range of features to be utilized • Incorporate own GIS data into the map
Weaknesses	• Cannot be integrated into existing project website • No way to collect demographic information • Limited engagement opportunities
Costs	• Standard Project License \$1920/annual • Professional Project License \$2880/annual • Enterprise license not publicly available • Organizational pricing also available for multiple projects
Available IT Support	Yes
Training	N/A
Example	https://www.socialpinpoint.com/project/central-coast-council-coast-pathways/

Common Place	Analysis
Use/Purpose	Commonplace's online consultation platform gives quality and depth of engagement needed to increase reach, build trust, and get buy-in from local communities. Allows users to set up a website to provide information and updates about a project, while receiving comments about areas that need improvements or feedback on the proposed designs
Interaction/Engagement Opportunities	Participants can make comments on a map by choosing the location, providing an action that is needed, and any additional comments. Participants can agree with these comments by liking them, or sharing them on social media. In projects with no maps participants can make comments on topics. Option to link to surveys from external tools.
Appearance/Organization	Equal Mix
User Set-up	Equal Mix
Supports Multiple Languages	N/A
Strengths	• Choice of standardized layouts for websites that allows for customization through the type of information the user provides • Adding comments is very easy and takes very little time • Provides options for responses in order to frame the discussion rather than gather only open ended answers • No requirement to log-in to provide comments • Option to create compelling graphics from the results of comments collected
Weaknesses	• Cannot be integrated into existing project website • No way to collect demographic information unless participant chooses to create an optional account
Costs	Not Publicly Available
Available IT Support	N/A
Training	N/A
Example	https://bristolbugbears.commonplace.is/comments

Community Remarks	Analysis
Use/Purpose	Community Remarks makes it easy for participants to plot a comment on a Google map. Shows improvement projects and illustrates pertinent project details to get informed feedback. Crowdsource comments during the visioning process, then present plans for feedback. Use it continuously for all types of projects in planning areas without increased fees.
Interaction/Engagement Opportunities	Participants can add comments to map topics; add photos to comments; vote on other's comments; can share comments on social media; comments are also added to street view. Registration is not required, but optional.
Appearance/Organization	Equal Mix
User Set-up	Standardized
Supports Multiple Languages	Yes - Google Translate
Strengths	• Comment submission is guided through prompts rather than open ended • Google maps integration makes the platform familiar to most participants • Overlays can be added to maps to show landmarks through GIS layers (can also be exported to GIS) • Well integrated for mobile use - will find current location of participant
Weaknesses	• Cannot be embedded into existing project website • Does not integrate any other ways for engagement
Costs	• Basic License, collect place-based comments: \$1,995 (one-time fee) • Basic +Plus, all phases of engagement: \$2,720 (one-time fee) • Basic +Plus for TIP, DOT projects & fiscal constraints: \$5,845 (annual) • Web Hosting: \$320 (annual)
Available IT Support	Yes (depends on licensing, minimum of 4 hours of technical support)
Training	Yes - 1-hour demo session to fully utilize all the features in the admin
Example	https://communityremarks.com/projects/

PlaceSpeak	Analysis
Use/Purpose	PlaceSpeak's unique geo-verification process connects participants' digital identity to their physical location and make comments on projects. Existing participants are automatically notified of new consultations in their community based on their interests.
Interaction/Engagement Opportunities	Participants select topics on a map of their local area and add comments or take surveys
Appearance/Organization	Equal Mix
User Set-up	Standardized
Supports Multiple Languages	Yes - Google Translate
Strengths	• Can be integrated into an existing project website • Engagement opportunities on each section for each project • Light on text, making it visually appealing and easy to navigate through • Can view other participants comments
Weaknesses	• Participants must register for the site with their address and phone number, however they can make their account private • Doesn't collect any other demographic data other than location
Costs	• Standard License \$249.99/month or \$2499.99/year • Premium License \$499.99/month or \$4999.99/year • Additional charges for add-ons
Available IT Support	Yes
Training	Yes - \$500/hour for up to 4 people
Example	https://www.placespeak.com/en/topic/5700-556-576-conservation-dr/#/overview

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