DIGITAL ENGAGEMENT
TOOLS & SUPPLIERS

A Curated List - Version 2

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At the heart of the community and stakeholder engagement work MODUS does is a firm commitment to respectful discussion and exploration with all participants, no matter how “hot” the issue or context.

We love doing this challenging and creative work across a wide set of sectors, and have developed a full and unique practice, with our own terms/definitions, guiding principles, core practices, integrative imagery, and a range of tools. The public-serving organizations and private companies we work with help us to apply and hone these skills, tools and processes. We are always learning.

We call our approach strong engagement, hold ourselves to a high standard in all our projects, and teach/train others to work in a similar way. We enjoy using engagement to “figure things out together” with diverse audiences, and have named ourselves MODUS to emphasize good process as critical to the range of products we help create.

Now that the engagement “context” we work in has changed so much (and in such a short time) due to Covid-19, we are challenged to keep up high standards and to ensure effective engagement by using more digital tools more often. While paying attention to the challenges that some people and groups will have because of this shift, and to different dynamics and needs online, we are committed to doing it well. And to helping other practitioners and participants in the engagement field “figure it all out” as well.
Dear friends/colleagues,

In this challenging time, having observed so many tragedies due to the Covid-19 pandemic, the entire MODUS team wishes you and yours the very best of health and safety. We recognize and accept that many of our and your past priorities have changed and will continue to change, both now and for the long-term.

Nevertheless, we also know that engagement will and must continue, perhaps (likely?) focusing on some of the health, economic and social challenges and opportunities that this crisis has allowed and forced us to face. We believe in both individual and collective contributions and solutions to common challenges, and see good engagement contributing to the best possible future for all of us and our communities.

MODUS also wants to help our clients and colleagues (and the diverse communities we work, serve and live in) to get through this as well as possible, and have tried to find ways to make positive contributions. One thing we have done is conceptualize, develop and share this document as widely as possible, with positive feedback from all quarters so far on its first version.

You are encouraged to use this document as you wish, and to send comments and criticisms so that we can make it better. We hope this version is useful to you, is easy on the eyes, and is self-explanatory and easy to use. We will say that it is a carefully curated listing and explanation of engagement activities that we often do in-person, but which can also be done online.

That was our main purpose: to identify and list the kind of activities we use to engage people around critical issues effectively, and to add suggested suppliers and platforms for doing this well online. Each row is organized around a type of activity we believe in, and the suppliers for each are simply listed alphabetically (noting that the italicized suppliers are those we have added since v1).

We would be very happy to hear about additional tools, additional suppliers, and even additional rows that you think would add value to this document. We do not know all the tools we have listed inside-out, and we do not have all the tools or all the answers.

However, the materials provided here should help you more quickly find and deliver good solutions in your work and in your communities, when you judge that the time and conditions are right.

One aspect of the following table that needs explaining is the coding Re: “when you should use this tool” in an engagement process. MODUS knows that some tools are better suited to earlier and broader activities, while others are more suited to the more technical (deep-dive, creative, and/or directional or decisional) stages that come later in a process.

We have therefore indicated when we think a specific row/tool is best suited for use.

We have also coded each row/tool according to whether it falls into what MODUS calls the “input zone” or the “engagement zone” of the public participation continuum, which was itself developed and publicized by the International Association for Public Participation (IAP2).

We are happy to share more details on the zones with you, but our work has shown that when you are “informing” or “consulting” in a process, you are supporting an input-focused process with less influence for participants. Nothing at all wrong with that, but the engagement zone is where efforts to more substantively “involve” and/or “collaborate” with participants properly land.

Finally, this is a living document that needs your comments and suggestions. MODUS will produce a version three, and so we really need to tap into your ideas and experience. If you can suggest an additional row, please do so. If you are a supplier who wants to have your tool added, let us know where and why. If you are a client or practitioner who can suggest an improvement or addition, please do so. We will promise to find a way to credit you in future versions.

Thank you very much, enjoy the tool, and stay safe and healthy please.

Most sincerely,
from your friends and colleagues at MODUS.

Produced by the MODUS Digital Engagement Team, made up of Mackenzie Fleming (Junior Engagement Specialist), Sarah Gillett (Senior Engagement Specialist), Michael Meyer (Engagement Specialist), Athulya Pulimood (Marketing & Learning Specialist), and Vince Verlaan (Principal; Engagement, Facilitation & Training Specialist).
INFORMATION / ISSUE PAPERS
Prepared by a project team member, and often used to kickstart public awareness and input, these short papers provide needed background information for the general public. Often finishes with focus questions and reference to a questionnaire. Helps develop informed opinions through text, photo galleries, infographics, videos or other content. Leads to/supports other engagement activities.

SUPPLIERS:
Link to your project website, or use engagement suites like Bang the Table, CitizenLab, Civil Space

DISCUSSION FORUMS
Users create new topics for discussion, comment on existing topics, reply to other people’s comments, moderate other users’ input, and/or direct message to other users. Forum content can be visible to everyone or just to registered users.

SUPPLIERS:
Bang the Table, Civil Space, Forumbee, Reddit, Social PinPoint

ISSUE RANKING
A carefully scoped list of key issues or trends to address, and participants rank them in terms of importance. Participants can be asked the reasons for their choices, and/or to suggest other key issues or trends.

SUPPLIERS:
Bang The Table, CitizenLab, Civil Space, Google Forms, Metroquest, Simple Survey, Survey Gizmo, Survey Monkey

COMMUNITY MAPPING
A map of the community or project setting, and questions which ask participants to identify important features on the map (e.g., things to protect or enhance, challenges to address or fix). Pairing participant comments with customized icons is a legible and effective way to get into more detail.

SUPPLIERS:
Bang The Table, CitizenLab, Civil Space, Maptionnaire, Metroquest, MindMixer, Neighborland, Placeit, Social PinPoint, Wayblaze

SMS POLLING & NOTIFICATION
Contact people on their cellphone to conduct polling, raise awareness, solicit donations, or give updates.

SUPPLIERS:
Pigeonhole Live, PollEverywhere, PublicInput, Sli.do, Stratcom, Textizen, TextTalkAct
QUICK POLLS

A single question posed to a targeted or broad audience through use of a questionnaire tool, or on social media. Use a simple "yes or no" format for the answer, or ask open-ended questions to gather short statements of participant's greatest hopes and fears (for example). Text entry will require some coding, so it is best to keep the character limit low.

SUPPLIERS:
Bang The Table, Google Forms, Simple Survey, Survey Gizmo, Survey Monkey, Twitter

QUESTIONNAIRES

Multiple questions are provided for participants to answer in a structured manner. Questionnaires can have a mix of closed-ended and open-ended questions. Available time and resources for activities like analysis and reporting must be considered when designing a questionnaire.

SUPPLIERS:
Bang The Table, CitizenLab, Civil Space, Google Forms, Konveio, LimeSurvey, MetroQuest, Placespeak, Social PinPoint, Survey Gizmo, Survey Monkey

EVENT POLLS

Questions posed live to online participants. Often participants may be asked to rank the responses to crowdsource what the group most values.

SUPPLIERS:
Mentimeter, Pigeonhole Live, Poll Everywhere, Slido, ThoughtExchange

STORYTELLING / WALK IN MY SHOES

"Step outside" of personal perspectives or needs to consider the challenges that others face, cultivate empathy, and think of ways that the project could address those challenges. Participants first read a brief profile of a fictional person, then respond to a project question based on that profile. Some platforms have played with the idea of participants submitting their own stories in an anonymous way.

SUPPLIERS:
Bang The Table, Civil Space
**Visual Preference**

A highly visual technique where participants review images and then identify the physical design alternatives (urban design features, architectural styles, landscaping options, built environment options, etc.) they prefer. Can also gather short explanations for their choices.

**Suppliers:**
Civil Space, CommunityViz, MetroQuest, MindMixer

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**Resource Allocation**

An online tool asking participants to prioritize between a set of options (facilities, services, designs, etc.), while working with finite resources (dollars, coins, tokens, etc.). This activity exposes and simulates key trade-offs decision-makers often have to make, and deepens participant engagement with the issues and process.

**Suppliers:**
Citizen Lab, Civil Space, MetroQuest

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**Participatory Budgeting**

A more complex exercise focused on allocating limited resources across various priorities/needs. Participatory budgeting shows the financial impacts of participant choices in real time.

**Suppliers:**
Balancing Act, Citizen Budget (Ethelo), CitizenLab, Consul, Dicidim, Participare, Social PinPoint

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**Scenario Planning & Calculators**

An online tool that helps people choose between alternative scenarios (future outcomes) and/or to see/explore the future effects of decisions made today.

**Suppliers:**
CommunityViz, Ethelo, MetroQuest

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**Draft Policy or Design Commenting**

Allows participants to review and comment on draft or near final policy or design documents produced by the project team in later stages of a project.

**Suppliers:**
Conceptboard, Consul, Dicidim, Ethelo, Konveio
ASK ME ANYTHING (AMA)
A live Q&A session where attendees ask questions of a topic expert or person with a particular experience. Uses live webcast or a discussion forum like Reddit.

SUPPLIERS:
Facebook live, reddit

IDEATION
A focused brainstorming process where participants submit a proposal, idea, or question, suggest answers or modifications, and then rank and comment on the submissions. Some platforms focus more on live brainstorming.

SUPPLIERS:
Bang the Table, CitizenLab, Consider.It, Crowdicity, Forumbee, IdeaScale, Miro, OpenGov, Social PinPoint, Stormboard, ThoughtExchange, Wayblaze

DIALOGUE & DELIBERATION
Through the use of “focus questions” under key theme areas, the project team can host a rich exchange of views leading to shared insight, new possible solutions, and even consensus on how to move forward. Dialogue activities are related to but very different from traditional discussion forums. The key fact is that “dialogue is a conversation with a centre, not sides” and that generating shared insight is the crucial aspect, rather than winning a debate. Deliberation is a form of thoughtful inquiry that moves a group toward a decision.

SUPPLIERS:
Common Ground For Action, DialogueApp, Loomio, Neighborland, Popdat, PublicInput, Synthetron, unhangout, Zilino

TELEPHONE TOWN HALLS
A cross between a large conference call and a private radio talk show, telephone town halls allow individuals to listen to speaker presentations, respond to poll questions, and ask the speaker questions live; and ask the speaker questions live, all done over the phone.

SUPPLIERS:
Stratcom, Converso
WEBINAR / EXPERT PANELS

Curated presentations, allowing for moderated Q&A sessions, discussion, and additional feedback gathered through quick polls.

SUPPLIERS:
ClickMeeting, Demio, GoToWebinar, LiveStorm, Webex, WebinarJam, WebinarNinja, Zoom

WEB / TELEPHONE CONFERENCING

Access a live web-based meeting or call in to a central number, to collaborate, hear from project staff, and ask questions. Platforms often allow screen sharing, quick polls, moderated Q&A, breakout rooms, and shared whiteboards.

SUPPLIERS:
Adobe Connect, Google Meet, GoTo Meeting, Jitsi, Join.me, Meeting Owl, Microsoft Teams, Skype for Business, Uberconference, Webex, Zoom

DIGITAL COLLABORATION SPACES

A digital canvas where presenters, team members, and/or participants collaborate in real-time, using a collection of tools to draw, collage, comment, and ideate.

SUPPLIERS:
Awwapp, Google Jamboard, Microsoft Whiteboard, Milanote, Mural.co, Sketchboard, Web whiteboard, Zoom

GRAPHIC FACILITATION & RECORDING

One or more facilitators or recorders use drawing to capture key ideas and conversations from your event, representing discussion in a highly visual way. Livestream the graphic facilitation or recording, or present material at the culmination of event. Creates an artifact (integrative poster, several linked images, Prezi or detailed report) that can be shared to all participants and posted on project website.

SUPPLIERS:
Get the Picture, Ludic Creatives
ONLINE DESIGN CHARRETTES

An evolving practice from community planning, urban design and architecture, currently with no specialized suppliers. Designers use various visual tools to gather comments on an area, site or building to illustrate various options for the future. Participant comments, gathered from one to several days worth of dialogue, help the designers evolve plans and/or designs. We suggest using a combination of platforms to present background and issue papers, videos, and other display content; conduct community mapping or ideation exercises; and use web conferencing or graphic facilitation to replicate the rich dialogue necessary for successful charrettes.

SUPPLIERS:

If you are a supplier or know of a supplier focused on providing an all-in-one platform for charrettes, please reach out to us.

CROWDFUNDING

Individuals propose specific community-supportive initiatives or projects to fund, and then gather supporters to fund the project; an interactive online platform providing guidance for proponents and supporting outreach efforts.

SUPPLIERS:

Causes.com, Citizinvestor, Kickstarter, FrontFundr, Neighborly, Wayblaze

FULL ENGAGEMENT PLATFORMS

Licensed "one-stop" services providing a central location for project information, input activities, and meatier forms of engagement. These platforms offer a suite of tools and formats in one environment, often supported by moderation and reporting capabilities.

SUPPLIERS:

76Engage, Bang the Table, CitizenLab, Civil Space, CrowdBite, Delib (Citizen Space), Ethelo, Konveio, MindMixer, Neighborhood, PlaceSpeak, PubliVate, Social Pinpoint, The Hive
EMERGING PRACTICES

As MODUS prepared and shared the first version of this document into the community planning, urban design and community engagement fields, we heard from colleagues doing interesting things in their own practices to shift to enhanced and expanded online practices.

In future versions of our "tools document" we will list and profile some of these innovations, so that we and others can learn from these new practices. We hope that you enjoy this example from our close colleague Derek Lee, Principal, PWL Partnership, and that you will send us similar stories when and if you can:

**During the Cov-19 requirement for working remotely, we had to decide between postponing an important client-facing workshop or carrying it forward with them participating remotely. We decided to do the latter and fortunately have met with great success.**

The project required us to engage with the client group with a visioning workshop for the project site. Using an online web conferencing platform, nine people participated in a visioning exercise that combined image selection, live sketching and a rich back-and-forth conversation by voice and text. We also were able to access our favourite digital sketching application on a tablet, and used that to capture the input of each of the participants through the online conversations, converting them rapidly into a series of graphic vignettes.

Normally we would approach this as a physical design charrette, where we would capture ideas, words, images, and blend them together as designers, and the good news is that we were still able to achieve this through a combination of good/simple technology, open discussion, and some advance 'homework' exercises by participants. The end result was a series of graphic vignettes that captured the words and images sent in advance, while allowing time during our online charrette for participants to engage and exchange ideas, through conversations and by working with the graphic sketch facilitator to realize their vision for the project.

[www.pwlpartnership.com](http://www.pwlpartnership.com)

ADDITIONAL RESOURCES

While researching specific engagement tools, we have come across several useful, recent and more general guides to working effectively online.

We are including a few here for your use, and will add more in version three of our "digital engagement tools document". We hope these resources are also useful to you, but take no credit or responsibility for their contents.

[http://www.leadinggroupsonline.org/ebooks/Leading%20Groups%20Online.pdf](http://www.leadinggroupsonline.org/ebooks/Leading%20Groups%20Online.pdf)

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