MHCLG Community Engagement Playbook
Alpha Brief

Product overview

This section includes:
1. Summary
2. The discovery phase goals and scope
3. Who is the audience for this playbook and what are their needs?
4. The format and structure of the playbook

1. Summary
Councils have struggled to pivot their engagement approach due to COVID-19. There is a strong desire from those involved in this discovery to learn from each other, and the playbook was seen as a way of providing a space for sharing good practice, providing inspiration and reducing risks for implementation. This, in turn, can help drive up the quality of engagement practices.

This document has been created to provide a summary of key findings relevant to alpha and handover documents which are crucial to the success of the next phase of work. For more information about the process we took, and detail into the insights, read the Discovery Summary.

2. The discovery phase goals and scope

Discovery goals
The focus of this discovery was to:

1. Define the user needs regarding community engagement that councils encounter and that the playbook would address.
2. Identify the local constraints that councils face when engaging with communities, and use these insights to build a taxonomy and case study structure.
3. Create and test a prototype based on user insights in order to develop something tangible as a final output.

What was moved out of scope for this project
During the initial few weeks of the project, the scope of the work was narrowed down to exclude any content around the planning process or digital inclusion, as both of these were

already being addressed by other playbooks/toolkits (Inclusive digital place-based engagement and Digital Inclusion). We also specified that the focus of the work should only be on engagement content or examples that have been done during COVID-19, and that we would exclude any non digital engagement case studies, unless it was directly linked to digital engagement examples. (Read our scope agreement created during the first few weeks of the project for more detail).

3. Who is the audience for this playbook and what are their needs?

Two audiences were identified for this playbook - engagement specialists and engagement generalists.

Engagement specialists
Engagement specialists are the primary audience for this playbook. These are people who conduct engagement activities on a day-to-day basis. Their needs include:

- Being able to provide support on a wide range of different engagement topics and activities.
- Support with meeting the requirements of statutory consultations.
- Ensuring engagements reach as many demographic groups as possible.
- Thinking about ways to improve the quality of engagement and making it more two-way.

Engagement generalists
These are the secondary audience for the playbook, and are people who do engagement in addition to their job. For example, they may be working in a service area which requires occasional engagement activity. Their needs include:

- Running engagements specific to their area (e.g. public health or planning).
- Often needing to engage with a specific community group related to their service or area (e.g. older people).
- Meeting the requirements of statutory consultations.

More information about these two audiences can be found in the Discovery Summary. The prototypes, content and structure of the playbook have been designed with specialists and their needs in mind, however all content was designed to be read by generalists as well. A full list of the 16 user stories and their acceptance criteria can be found here. These needs should be used to ensure that any case study submissions match at least three to five of these needs, with the ones that match the most being prioritised above others for completion. Incoming case studies can be ranked against user stories using the following template.

To help show how the playbook can address these needs and the challenges that users face around engagement, we have mapped out the current user journey against the proposed impact that the playbook could have. This can be found here.

As well as this, we have created an engagement strategy based on the findings from this discovery to illustrate what channels could be used for raising awareness about the playbook. This should be built on as new findings in alpha and beta are collected.

4. The format and structure of the playbook

Format

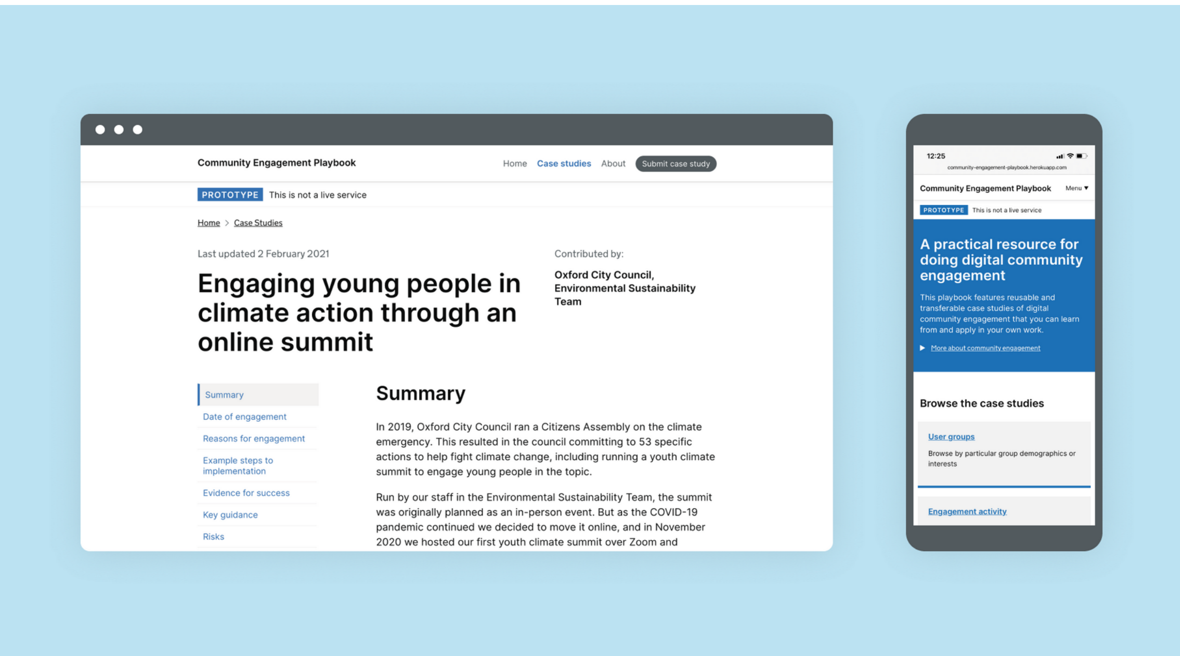
Insights showed that an online, web-based playbook is the best format to capture and present information about good community engagement practices across local authorities. A playbook is a practical resource that contains information and, in the context of this project, this playbook features reusable and transferable case studies of digital community engagement that others can learn from and apply in their own work. This playbook consists of:

- An information architecture
- A taxonomy (classification system)
- Case studies
- Tags

These have all been carefully considered based on the first round of interviews (with 11 people), and further tested in round 2 (with 7 people). We do, however, strongly recommend these are continually tested during the alpha stage and built upon.

Research showed that the playbook needs to be an online platform, in an intuitively accessible place to allow everyone easy access to it. PDFs were viewed as too static, especially as content is still being collected. Furthermore, the format is not accessible and inclusive which does not align with the Local Digital Declaration. An intranet was avoided, as the nature of these does not allow for easy sharing between members of different local authorities. To make the playbook easier to scale and maintain, it was agreed that uploading single case studies, instead of creating an amalgamation of case studies to define 'best practice', was the best way forward (more information [here](#)).

Prototypes



We designed two prototypes. The first was a Figma prototype that we used to test the format, taxonomy, information architecture and case study structure of the playbook. The second built on the insights from testing the Figma prototype and used the GOV.UK prototype kit. This HTML prototype should be tested with users during the alpha phase.

Prototype link: https://community-engagement-playbook.herokuapp.com
Username: MHCLG
Password: MHCLG

Recommendations

This section includes:

5. Our recommendations.
6. What needs to be tested?
7. Outcomes-focused roadmap.

5. Our recommendations

There are two ways to run the project after discovery:

1. **Working towards a 'fixed' product** - where development and content creation continues until a certain point (e.g. through alpha and beta to live), and then the playbook exists as more of a fixed product without ongoing resources to develop further content.
2. **Seeing the playbook as an ongoing, evolving piece of work** - where there is no final end date, and instead there is ongoing investment and resource to keep growing and evolving the playbook functionality and content to adapt to the needs of local authorities.

The aim of a playbook is usually to define and share a practice, and this means they tend to be created at a specific moment. They're often not updated or maintained in a continuous way, unless they already have an active community of practice already in place around them. In addition to this, the findings and direct experiences gathered in the discovery highlight councils' lack of time to support this type of work, particularly in the long term. Unless a proactive organisation or council is found to take the lead for this work, and illustrate how it can be maintained in the longer term, we would recommend this playbook is designed as a static product. Additionally, as the focus of the playbook is around examples that have been created during COVID-19, working toward an agreed end date would be more appropriate.

However, if MHCLG decides to develop the playbook as an ongoing piece of work, they will need to continue the conversations that have been started during the discovery phase with stakeholders around community engagement and the needs of councils that extend beyond the scope of this work. By continuing these conversations in parallel with the development of the playbook, the project team would be building an engaged community that can not only put forward relevant case studies, but can potentially create new ways of learning from each other.

With either approach, it is important for MHCLG to move as swiftly as possible into the next phase in order to harness the momentum that has been created within this initial discovery. The project team has already received requests from users for information on next steps.

6. What needs to be tested?

The following six points are strongly recommended to be tested in the alpha:

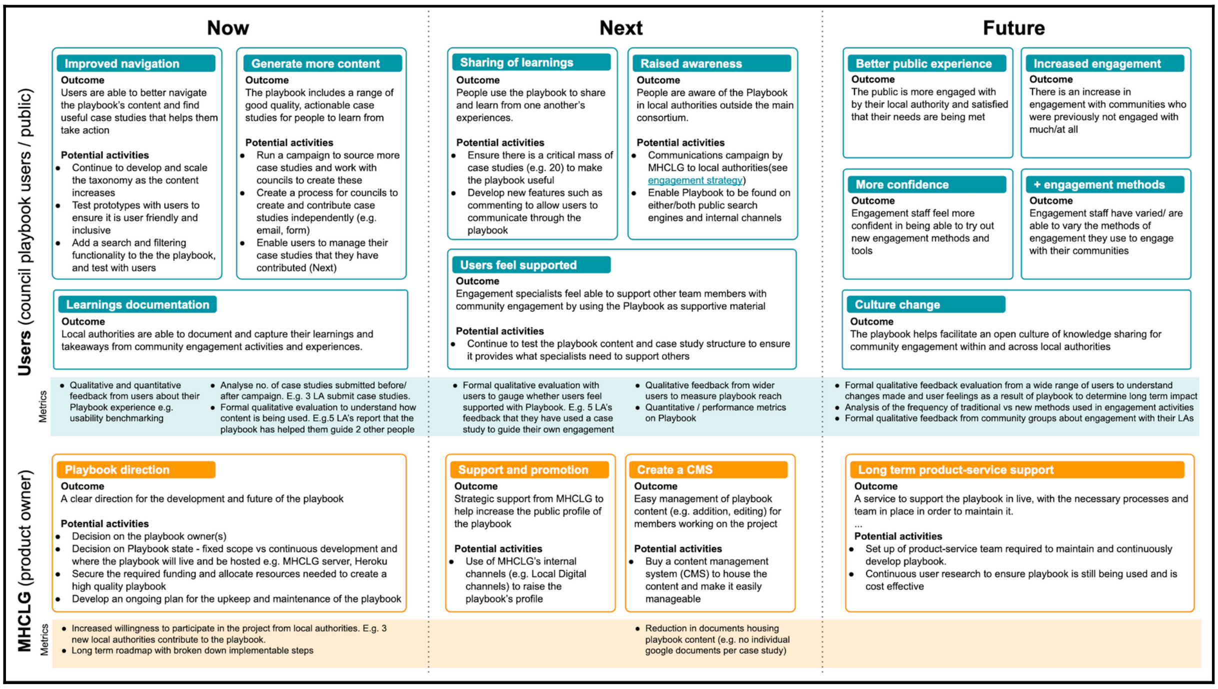
I. **Minimising contribution barriers** - trialling different ways to minimise the barriers for users to contribute to the playbook. These barriers included time, not knowing what the process involves, and not feeling recognised as having something to contribute.
II. **Include other resources** - attach tangible assets such as templates or other resources to case studies. However, this could be a barrier for users to submit case studies, and could have technical implications.
III. **Information architecture** - test and iterate the structure of the playbook to make sure the content is where users expect it to be, and that it is in a format they can use to achieve their goals.
IV. **Ways to find relevant content** - test and design ways users can find content that is relevant to them, and that will scale with the number of case studies. For example, refining the taxonomy or adding search and filtering functionality.
V. **Service overview** - testing the overall user journey with a particular focus on how people find the playbook.
VI. **Content management** - defining and agreeing how the content is managed on an organisational level (technical management can be addressed at the later stages) to ensure the playbook can be kept up to date and remain sustainable.

All design decisions have been added in this document to show what insights were used to inform each decision, as well as providing a more detailed overview of what should be tested in the next phase. As well as these areas, there were also a few key questions that need to be answered to ensure the sustainability of the playbook:

- Where would we host the playbook?
- Who would own it, or would it be a consortium effort?
- Would there be an ongoing product owner?
- Who would maintain the playbook and update it with content?
- Who should be able to update the information on the playbook?
- How would people add to the playbook?

7. Outcomes-focused roadmap

Outlined below are the key steps that MHCLG needs to take when developing the playbook (see full document here).



Considerations for next steps

This section includes:

8. What are our riskiest assumptions?
9. How do we measure the success and impact we're having?
10. Suggested skills for the next phase.

8. What are our riskiest assumptions?

In order to ensure we are setting up the next phase of work with the strongest chance for success, we have mapped out the riskiest assumptions that have come out of the discovery. Below are the four most important of these that should be taken into account during the alpha phase. Further risky assumptions for this work can be found here, under the 'riskiest assumptions' tab.

1. A playbook will solve the issues users have been having around community engagement.
2. That there will be enough time dedicated to this playbook to support the production of relevant content to encourage adoption.
3. That people will be willing to contribute their case studies, and will have the time to do so.
4. That people are going to know about and be interested in the playbook.

9. How do we measure success and the impact we're having?

The table below lists the three top recommendations for how to measure the success and impact that the playbook is having in the next phase. We have also explored other ways to do this, which can be found in this measuring success document. These methods have been based around two types of metrics - general and analytics.

It's important to note that there was a group consensus when the primary target audience for the playbook was agreed that the focus of this playbook should be around 'impact' and not 'reach' (more information here). While we have included metrics around reach and engagement (analytics), these will only show the surface figures and will not provide insight into how well the playbook is working, or if people are reusing the practices in the playbook (which is how the playbook will achieve the greatest impact).

Metrics	Why	How
General		
Understanding how many people have implemented a case study/part of a case study from the playbook.	To find out if people have actually implemented any of the case studies.	**(From simple to more complex)** • Introduce a feedback feature in each case study (e.g a thumbs up to show they've used it). • Add a commenting function where people can say if they've used it, and give feedback. • Add a survey or feedback form (e.g. a pop-up or banner) that asks whether they have implemented e.g. a case study/what value they've gained, as well as general feedback.
Understanding how users change their practices after using the playbook.	To understand the longer term impacts of the playbook.	• More formal qualitative evaluation, following up with users to understand how they've used the content - this could be in the form of a survey asking about any changes in how they work, or interviews to dig deeper on an individual basis.
How many people submit a case study.	To understand if there is appetite to contribute, and whether people see value in contributing.	• Analysis of the number of submissions coming in - either through email submissions or through any other options that have been developed (e.g. forms).

10. Suggested skills for the next phase

Based on the findings from this discovery, as well as experience supporting the creation of other playbooks such as Service recipes for charities and The Mental Health Patterns Library, we believe the following skills will be needed for alpha. These have been divided into essential skills that are needed to ensure the final product is of a high quality, and nice-to-have skills that would support product quality even further. In addition to this, we have created a table of suggestions for what core skills will most likely be needed to effectively run a live service which can be found here.

Skills for alpha		
Role	**Why they are needed**	**Duration**

Essential		
Developer - front end and back end (or possibly full stack)	To build and iterate prototypes based on user feedback, and to advise on technical feasibility of designs or solve technical problems like: how the content is managed, how the user finds content, how we integrate with analytics platforms to measure success. They would also look into technical spikes or research stints to understand the technical landscape.	Early on in an advisory role, and then later building the prototypes and product.
Interaction designer	To work out the best way to let users interact with the playbook. They will be creating, testing and iterating on prototypes to meet user needs. They will also be responsible for how the playbook fits in the wider service, e.g. how people are aware of the playbook; what happens when somebody has looked at a case study; how does somebody submit a case study (e.g. email, Google form, integrated submission page etc.), as well as the process / workflow of publishing a case study.	Throughout the project. They are a critical role for continuing to develop the prototype.
Content designer	To continue the development of the playbook content journey for users, e.g. developing an intuitive taxonomy that helps users find what they need, iterating the case study template to make it as useful as possible. Working with the user researcher and interaction designer to turn user needs into practical content. Required during the development and testing of the alpha and beta.	4-5 days a week if producing case studies too.
Product manager	Product manager runs the day-to-day needs of the project. Makes decisions day to day, and works with the delivery manager to prioritise sprint aims. Manages client relationships and any bureaucracy. They are most crucially needed to manage the backlog and prioritise work.	Full time.
User researcher	Runs usability testing sessions for the prototype, working closely with the interaction designer and content designer. Designs user research aims per user research round, and develops discussion guides. Leads and supports sessions where necessary. Works with a performance analyst to create a user research plan for beta phase.	Full Time, 4-5 days a week.
Nice-to-have		
Research ops	To develop and consult on GDPR, consent forms, data management, as well as recruitment of participants for user research testing. Works with service designer and user researcher to ensure we are recruiting the ‘right’ users.	2-4 days, where needed.
Communi-cations/ marketing	Work is required to source good quality case studies to feature in the playbook, and a comms campaign would be effective in getting the word out. Equally, once the playbook launches, a comms plan will be needed to	Case study campaign, a few days support.

	promote it and make sure people are aware of it. For the case study campaign, to get up and running. For the launch, to make connections with stakeholders, plan campaigns etc.	For launch, a few weeks part-time.
Performan-ce analyst	An additional nice-to-have, possibly more for a beta phase or late alpha.	Very end, ½ a day