

Community Engagement Playbook

Project overview

11th February 2021

snook

Hello, we are Snook. We're a design studio built to make the world more human.

Snook are an award-winning and highly regarded service design and social innovation agency based in Glasgow and London. We have been applying service design methods (including co-design and co-production) in our work with public, third and private sector organisations since 2009, working with national government, local authorities, the police, health, social and education services across the UK.

Snook's approach is underpinned by three key foundations: research, design and strategy. We understand what people need, we design and build products and services that serve these needs, and we support in the successful launch of these.

This document is a summary of:

- The Discovery Summary
- Alpha Brief

[Visit on Github](#)



Our project's focus

Creating a community engagement playbook for councils that gathers information, examples and learnings from a range of sources around new ways **local authorities have engaged citizens during COVID-19**.

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 these were directly linked to digital engagement examples. (Read our [scope agreement](#) created during the first few weeks of the project for more detail).

What have we been looking to answer?

This discovery was designed to explore what a playbook that helped local authorities carry out community engagement might include. To achieve this, the discovery had three main focuses:



1. Define the user needs that councils have around community engagement that the playbook would address.



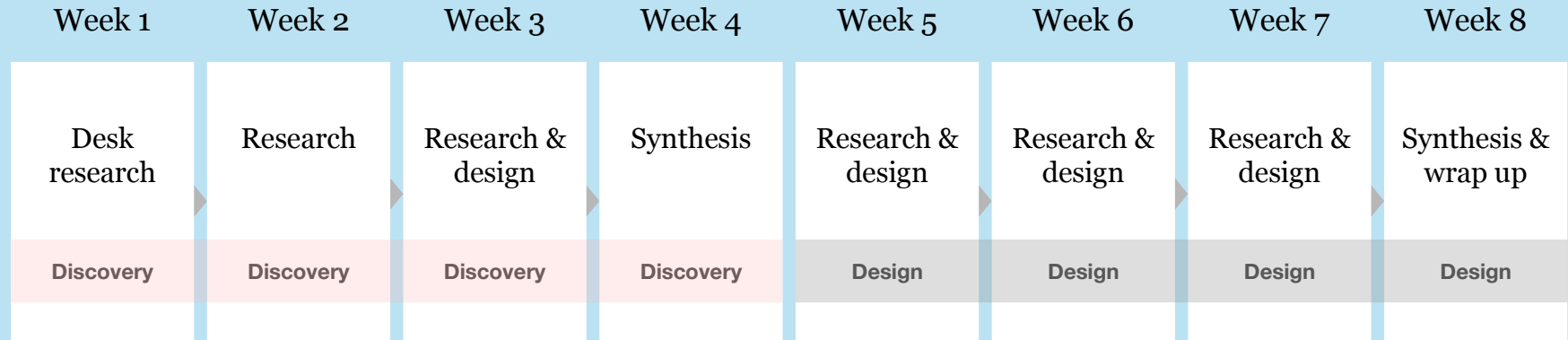
2. Identify the local constraints that councils face when engaging with communities, and use these insights to build a taxonomy and case study structure.



3. Create and test a prototype based on user insights to develop something tangible as a final output.

Project recap: what have we achieved?

Although this was a discovery project, we also wanted to develop a prototype to begin to test what a playbook might look and feel like in practice. This meant the eight weeks were divided into four weeks for discovery before moving on to four weeks for design.



OUTPUTS

- Desk research summary.
- A research discussion guide.
- Taxonomy options.
- Research to define the project.
- Project scoping document.
- Interviews with 11 users.
- User stories.
- Show-and-tell 1.
- Key insights from the discovery phase.
- Prioritised case studies list.
- Prototype v1.
- Testing prototype with 7 users.
- Case study structure.
- Show-and-tell 2.
- Interviewing 5 people for case study content.
- Testing.
- Prototype v2.
- Show-and-tell 3.
- Language slide deck.
- Statutory consultation doc.
- Alpha brief.
- Discovery summary.
- Roadmap.

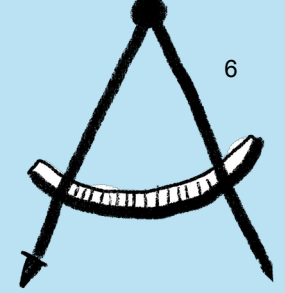
Key insights and actions

We created seven core research areas based on our assumptions, and then explored these in the user research. We've developed key insights for each area and detailed what these mean for the playbook.

Key areas

1. Defining the main audience.
2. Creating user stories.
3. Developing a taxonomy.
4. Defining the playbook format.
5. Defining the format of the content.
6. Selecting the case studies.
7. Developing and refining the prototype.





Key insights and actions

1. Defining the main audience

To ensure the greatest impact, the primary audience for the playbook should be engagement specialists.

What this means for the playbook

Success should be measured by impact rather than reach - i.e. the number of people implementing the practices in the playbook, rather than just viewing it. This means focusing on engagement specialists, who have more opportunity to put learnings into practice and can act as a gateway to other council staff.

2. Creating user stories

Turning the common user needs into user stories helped guide the playbook content.

What this means for the playbook

We created 16 user stories from the common needs, and then prioritised them based on how many participants spoke about them. Going forward, they should be used to decide what is the most relevant and useful content to add to the playbook.

3. Developing a taxonomy

A simple taxonomy based on categories such as engagement activity type and target group tested best.

What this means for the playbook

The current taxonomy and tagging system takes a light-touch approach that can be developed and scaled further as more content is added to the playbook. It will need to be tested as it grows to ensure that it still fulfills the needs of users.



Key insights and actions

4. Defining the playbook format

The desk research showed that digital products are the easiest to navigate, maintain and make accessible to all.

What this means for the playbook

Most users in the research also preferred accessing content in a digital format, so the playbook should remain web-based but needs to be tested further as it grows to ensure it continues to meet the needs of users.

5. Defining the format of the content

A case study format allows for the inclusion of key contextual details, which was important to users.

What this means for the playbook

We received positive feedback on the case study format in our user research, but the template should be tested further to better understand if the categories and hierarchy of content best fit the user needs.

6. Selecting the case studies

User stories provide a clear way to prioritise which case studies should be added to the playbook.

What this means for the playbook

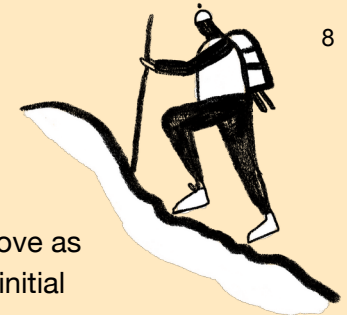
We mapped potential case studies against the user stories, and selected the ones that met the most stories. New case studies should also be assessed in this way to ensure content is as relevant as possible to user needs.

7. Developing and refining the prototype

Building a prototype early helps us test both the content and structure of the playbook.

What this means for the playbook

The prototype should be used to carry out more testing with users to gather feedback to inform areas for development such as the playbook taxonomy, navigation and submission process.



Our recommendations

There are two ways to run the project after discovery. 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.

Option 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.

Framing for this option:

- Playbooks are usually created to define and share a practice at a specific moment, and not often updated unless they have an active community of practice already in place around them.
- The findings and direct experiences gathered in the discovery highlight councils' lack of time to support this piece of work, particularly in the long term.
- The focus of the playbook is around examples that have been created during COVID-19, so working toward an agreed end date would be more appropriate.

Option 2:

Seeing the playbook as an ongoing, evolving piece of work - where there is no final end date; 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.

Framing for this option:

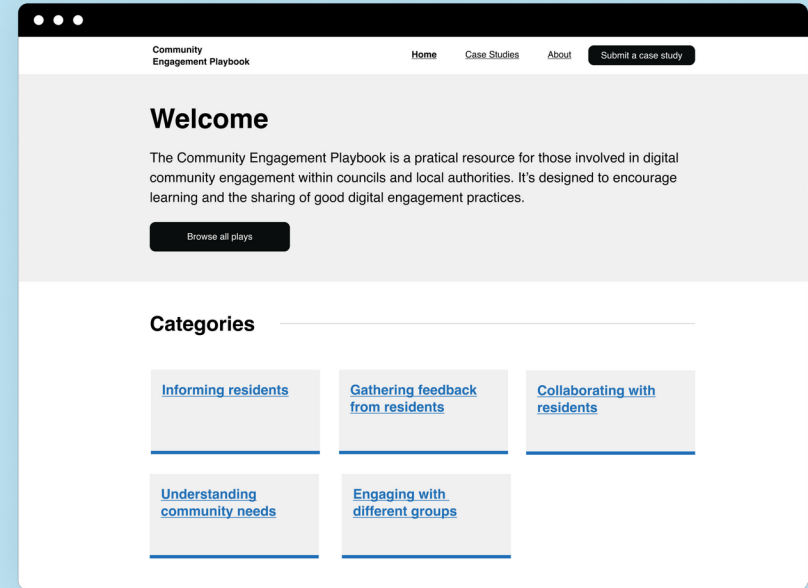
- If this option goes ahead, the project team will need to continue the conversations that have been started during the discovery phase with stakeholders around community engagement and the needs of councils that extend beyond the scope of this work. By doing this they would be building an engaged community, that can not only put forward relevant case studies, but can potentially create new ways of learning

Figma prototype

The first prototype was designed in interface design tool Figma. This allowed us to quickly see how our content looked in the format of a website. Also, because it can be edited in the browser, it meant more of the team could collaborate and quickly move things around as we developed a first draft of the taxonomy, information architecture and case study structure.

We tested two versions of the Figma prototype over seven interviews with users. The interviews were with an even mix of community engagement specialists and generalists. Afterwards, we analysed the findings from the interviews and weighted them based on whether they were from our primary audience (engagement specialists) or secondary audience (engagement generalists).

[Open prototype](#)



HTML prototype

We took the insights from testing the Figma prototype and applied it to a prototype made using the GOV.UK prototyping kit. This kit allows us to rapidly make prototypes that look like real websites, and can be tested with users. The kit also allows us to use styles and components that have been thoroughly tested and comply with accessibility standards.

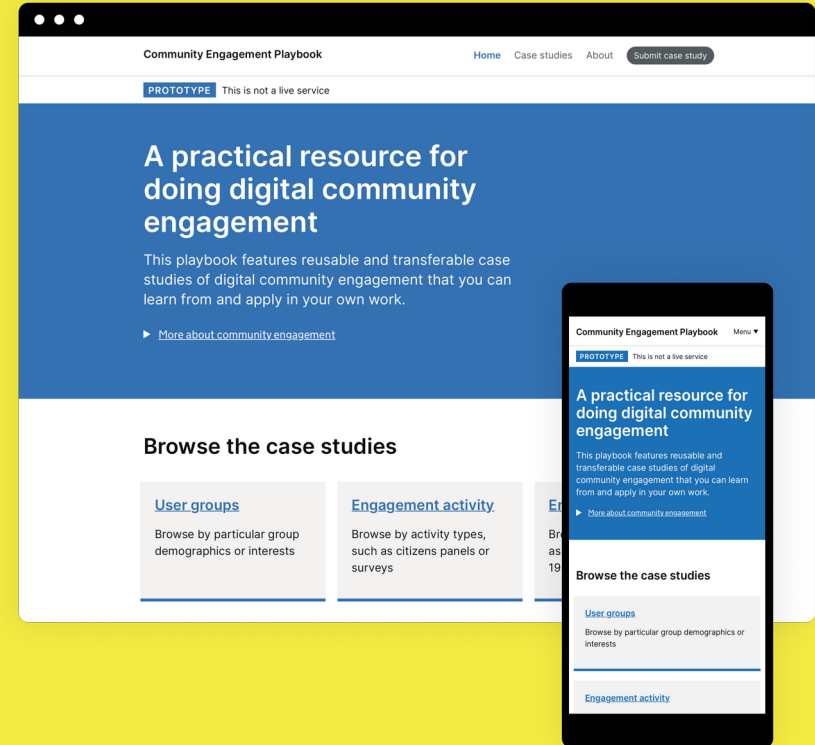
This prototype should be tested during the Alpha phase of the project.

[View on Github](#)

[Open prototype](#)

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What needs to be tested?

The following six areas should be prototyped and tested as part of the alpha phase of the project:

1. 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.

4. Ways to find relevant content

Test and design ways users can find content that is relevant to them that will scale with the number of case studies. For example, refining the taxonomy or adding search and filtering functionality.

2. Include other resources

Include tangible assets, such as templates or other resources, with case studies. However, this could be a barrier for users to submit case studies, as well as having technical implications.

5. Service overview

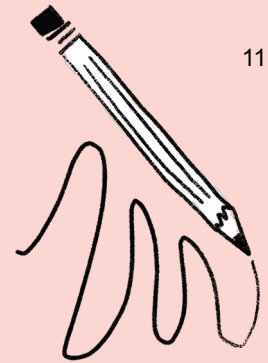
Testing the overall user journey with a particular focus on how people find the playbook.

3. Information architecture

Test and iterate on the structure of the playbook to make sure the content is where users expect it to be, and in a format they can use to achieve their goals.

6. Content management

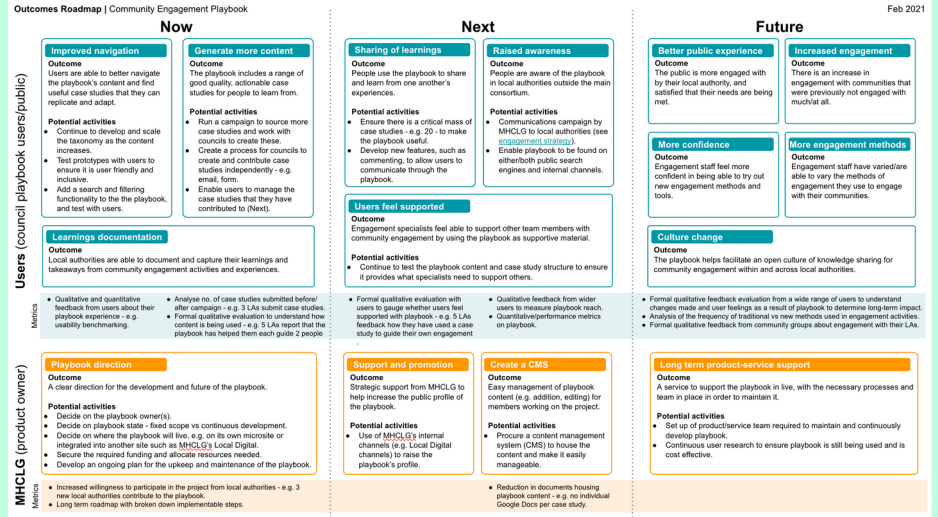
Defining and agreeing how the content is managed on an organisational level (technical management can be addressed at the later stages), to ensure the playbook can be kept up to date and is sustainable.





Roadmap

We have developed an outcomes-based roadmap to show where we think the playbook is headed and to provide an idea of what success looks like. These are paired with suggestions of activities, as there are different ways to reach an outcome, along with metrics that detail how to measure success.



What are our riskiest assumptions?

We have mapped out assumptions and prioritised them in order of risk, to ensure we are setting up the next phase of work with the strongest chance for success. We believe the riskiest assumptions that should be taken into alpha are as follows:



1.

A playbook will solve the issues users have been having around community engagement.



2.

There will be enough time dedicated to this playbook to support it in producing relevant content to encourage adoption.



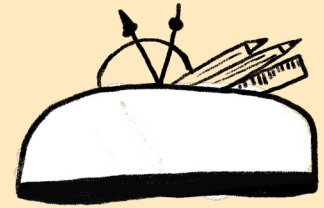
3.

That people will be willing to contribute their case studies to the playbook and will have the resources (time) to do so.



4.

That people are going to know about and be interested in the playbook.



What skills are needed for alpha?

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

Developer - front end and back end (or possibly a 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.
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.
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.
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 backlogs and prioritise work.
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.



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

We propose measuring success through two metric types: analytical and general. These aim to provide an insight into the playbook's impact in both a quantitative and qualitative manner. The top three metrics have been listed in the table (right).

Further measurements of success can be found in the [measuring success document](#).

Metrics	Reasoning	How
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) <ul style="list-style-type: none"> 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/give feedback. Add a survey or feedback form - e.g. a pop-up or banner - that asks whether they have implemented anything/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.	<p>More formal qualitative evaluation, following up with users to understand how they've used the content.</p> <p>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.</p>
Measurement of how many case studies are submitted in a set period.	To understand if there is appetite to contribute, and if people see value in contributing.	Analysis of the number of submissions coming in - either through email or any other submission formats developed - e.g. an online form.

If you have any questions about this work contact:

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