

Consultation Best Practices

Following these tips and advices will ensure that your consultation goes smoothly and that you get the best results in engaging your stakeholders!

Ethelo™ is provided by Ethelo Decisions Inc. | 1.888.724.9075 | 3 – 426 Main Street, Vancouver, BC V6A 2T7

✓ **Keep it concise**

Keeping it concise ensures a better response rate and more thoughtful responses from participants. Whether we are talking about the introduction text, the descriptions, or the whole consultation, you'll want your residents to be able to complete the exercise in around 10-15 minutes (not counting any links you may include).

Therefore, we recommend choosing no more than 15 questions in total, however, there are no limits to the number of questions you can include.

✓ **Get other departments involved early in the process**

The sooner you can involve all your relevant Departments in the process the smoother your consultation will go. Allowing a couple of weeks or so to get the appropriate level of buy-in and input internally will help expedite your Ethelo consultation launch and avoid having to make any major changes at the last minute.

On our end, we can prepare your draft website for your review within a week of receiving a complete Data Collection Form.

✓ **Speak directly to your audience and invite their participation**

- Consider adding a subheader to your headline, with some kind of invitation to engage, like "What do you think?", "Your two cents, please", etc.
- An introduction is critical, even a brief one, that:
 - speaks directly to the residents in a jargon-free language,
 - explains what is the purpose of the exercise
 - frames the expectation around how you will use their feedback
 - provides some background information - this can take the form of text, graphs or links to relevant pdfs. or webpages

✓ **Make it thoughtful**

We encourage you to focus on those programs and services that have the greatest direct impact on stakeholders' daily life so as to ensure a greater response.

A great feature to take advantage of is the "Learn More" feature or the "Sidebar Content Box" as either a way to provide links to your website or as a pop-up box that provides more information. The best consultations not only provide succinct and relevant information, but they also ask very precise and concrete questions. For example, instead of asking about the budget of the library, these consultations ask how many more hours per week the library should be opened, directly associated with cost. Not only will the participants be able to make choices based on their experience, but you won't have to provide that much detail about the whole library budget.

✓ **Make it interactive, informative and attractive**

- Consider adding a header photo or photos to all/some of your questions
- Embed links in the text that take the reader to webpage or pdf that provides context or background to your questions
- Consider using the yellow "Learn More" button beside all/some of your questions to provide further context without cluttering the main page.
- Consider using "Sidebar" content boxes
- Take advantage of various widgets that allow you to pose data-driven questions in different formats, including sliders; yes/no buttons and; multiple-choice boxes

✓ **Use survey questions strategically**

Although Ethelo is designed to be an interactive consultation, some clients do add general survey questions to their consultation. While this is perfectly legitimate use of the tool it's best to be strategic in your use of survey questions so as not to make your consultation too lengthy and possibly decrease the number of responses you'll receive. You may also want to consider putting them at the very end of your consultation and specifying that the survey questions are optional.

✓ **Allow time for review**

We encourage you to send us as near-finalized a first draft as possible (including punctuation) which will enable us to prepare a beta version of your website in a week's time approximately. You'll want to allow for a few days after your beta version is ready for review, for any changes you may want to make to the beta version, which ideally, will be the only minor in nature at this point. Finally, we ask that all changes are finalized at least 12 hours before your consultations scheduled launch time.

✓ **Have a strong outreach strategy**

Once you have your consultation set up, how do you get stakeholders to participate in large numbers? Our clients tell us it takes a coordinated effort on all staff's behalf in order to best encourage your stakeholders' participation. Once they are there, participation rates are high, from 15% to 35% in our experience.

We invite you to consult the attached "Promotion Tips" document on best practices to promote your consultation and ask that you let us know what works (and what doesn't) since we consider you our partners in innovation! In addition, a client successfully implemented a promotional strategy of having its staff bring tablets/iPads to budget or other public meets in order to explain to stakeholders its consultation website and offer the chance to complete it on the spot or else, hand out small stickers as reminders to do it at home. Another client sent promotional postcards to all households and promoted it at community events, with great results.