



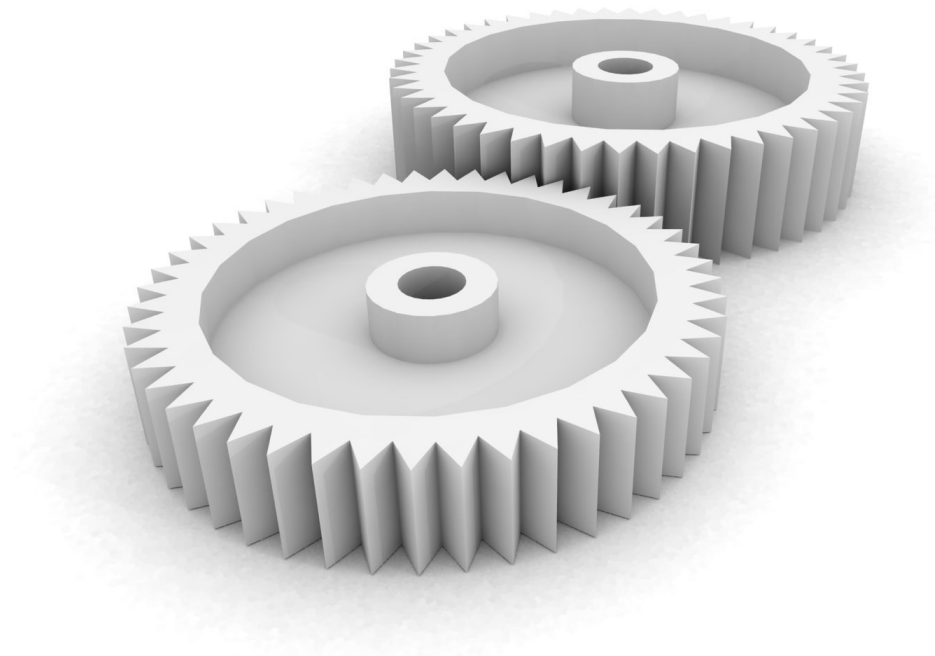
# **ONLINE ENGAGEMENT GUIDE**



# PROVIDING AND STORING DETAILED INFORMATION



# TIPS



## **Web Sites**

- Make the ways that people can connect and participate visible and inviting
- Establish a go-to section of the website for specific proposals being discussed
- Consider using a Content Management System (CMS) for the agency's website so that design and information can be upgraded separately
- Allow experts in information to edit and add material quickly
- Look at complete software systems vs. writing a system from scratch
- Visit top websites to get ideas on how to organize information and invite participation
- Ensure the site is accessible for people with disabilities

## **Document Management**

- Work with the city and county departments to determine how information in document management can be incorporated into the agency website
- Look for document management software that has existing connections or can be interfaced with other systems used by the local agency

Websites are a common way for local agencies to interface with their community. Whether an agency is talking about annual budgets, a proposed development by a property owner, an upgrade to a park or a new plan or policy, the first step in the process of considering such a proposal is to make detailed information available to the public.

This is an area where technology can add some real value. In most cities and counties there are ways to use existing systems – such as agency websites and document management – to enhance this process.

In addition to being the “home base” for all of the governance and policy information, websites convey ways the public can communicate and interact with local agencies, such as:

- Contact information for elected officials
- Information about governing body meetings
- Announcing community meetings/workshops
- Sign up for newsletters
- eComment and eNotify services
- Social Media channels
- Surveys
- Online engagement portals

#### **About the Institute for Local Government**

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- The Institute welcomes feedback on this resource:
- Email: [info@ca-ilg.org](mailto:info@ca-ilg.org) Subject: Providing and Storing Detailed Information
- Mail: 1400 K Street, Suite 205 • Sacramento, CA • 95814

#### Acknowledgements

##### Primary Author:

- Brian Moura, consultant to Local Government Agencies specializing in Management, Finance, Economic Development and Civic Engagement

##### The Institute is grateful to the following reviewers:

- Susan Stuart Clark, Civic Engagement Consultant
- Jasmine Frost, IT Manager City of San Carlos

# WEBSITES

In the early 1990s, agency websites began to appear as a way to present city and county documents and information in new ways with images, pictures, graphics and color. This includes:

- Headlines
- Service request forms
- What's going on at the agency and in the community
- Events
- Calendars
- Email and phone contact information
- Program and project updates
- Meeting agendas and minutes.

California cities like Palo Alto and San Carlos were pioneers in using this technology to post and share information about their agency and communities since the early 1990s and their usage has grown to be pervasive in almost every agency today. Interestingly, cities and counties embraced and rolled out websites long before most private sector firms and technology companies discovered them. Some have called this technology a revolution in information availability and convenience. Now, many local governments are working with Responsive Web Design to make sure that their websites are easily readable on mobile devices as well as tablets to keep up with evolving technology.

## **PUBLIC ENGAGEMENT AND THE WEB**

Agency websites are an excellent way to provide detailed information on the topic, proposal or project being discussed. A starting point is to meet with the staff that manages the website to plan out how to provide information on the topic.

In terms of posting material, a good approach is to add an area to the website that contains all of the information about the proposal. This would include a description of the proposal, the history and background of the idea, detailed reports that explain the proposal and the options that will be considered by the commissions and governing body and any images or graphics that show how the project will fit in with the area.

Local agencies may also want to post information on the workshops and meetings that will be held to discuss the proposal so that interested parties can easily track the process. As the project progresses, an agency can add records of community meetings, videos and other resources to keep the public up to date.

The website also provides an opportunity to post documents that need comment such as an Environmental Impact Report (EIR). One note here - the size and extent of these reports also result in posting them as a series of smaller files to facilitate on line viewing and printing.

Information offered in this manner could enhance public participation in the discussion process. It will allow all interested parties to have as much information as the decision makers do. It will also encourage the discussion of specific aspects of the proposal before, during and after the meetings.

## **WEBSITE CONSIDERATION**

While most cities and counties have websites, many were initially launched years ago. These jurisdictions may want to look at updating the website so that it uses a Content Management System (CMS). With a CMS based site, the graphics and look of the site are stored separately from the information or data entered by each department. These systems also feature fill in the blanks forms to ease entering information.

Other key features of a CMS web site include calendars, email lists, service request forms, surveys, video playback and many others. Obtaining these features in the past meant custom programming and interfaces to an agency web site. Today, agencies can obtain them “off the shelf” as part of a standard package.

Another consideration should be website software that can be interfaced with other software programs and technologies in use by one’s agency. This could include programs that handle document management, cable casting of meetings, agenda and meeting minute management, municipal code publishing, geographic information systems (GIS), permit systems, parks and recreation registration software and other software systems used by the agency and its departments.

Keeping these considerations in mind when procuring or enhancing website software will avoid a lot of challenges down the road. It will also result in a much more usable and complete system for the agency and the public.

## **AWARD PROGRAMS ARE GOOD RESOURCES**

An excellent resource for researching the use of agency websites is the awards programs that recognize the use of web site technology by local government agencies. Often agencies that have won awards in these programs have developed cutting edge enhancements and features that can also enhance an agency’s existing website, web technologies and public engagement program.

Now that most agencies have web sites, most of these programs have moved away from the original emphasis on “best web site or portal” to giving awards to agencies that use web technologies in innovative ways to provide new and better services to the public. Some of these latter awards focus on disseminating information and marketing your community which could tie in to public engagement work.

Agencies may also want to pursue one of these awards if they have developed an innovative use of web technology to serve the public. To determine whether an agency’s use of web technologies meet this test look at the award criteria in each of these recognition programs.

An example of the criteria used to judge nominated uses of web technology in the Center for Digital Government’s Web and Digital Government Awards include:

- Does it feature innovative use of web technologies, social media & the “Wow factor”
- How has the innovation improved service delivery to the public
- Ease of use and satisfaction when using on-line transactions
- Security, privacy, usability, accessibility
- Does it make the agency more efficient and reduce agency costs

To help research these best practices, a list some of these award programs and agencies that have been recognized for innovative use of web technologies is included in the reference section of this article.

# DOCUMENT MANAGEMENT SYSTEMS

A related technology that can help provide detailed information on a proposal is an agency's document management system. These systems are used for archival storage of documents in all city or county departments. They typically store information on permits, plans, drawings, reports, budgets, contracts and agreements and meeting agendas and minutes.

Document management systems not only store documents but they also include powerful search capabilities. These search features enable agency staff to search through current and previous documents, resolutions, ordinances and reports on any given topic. This provides an excellent research tool for the agency. To enhance the search feature, keywords and subject information can be added to each document. This used to be a requirement for facilitating document research. However, with the addition of full text search capabilities in today's document management systems, while providing keywords and subjects can speed the search process, it isn't as important as in the past.

In recent years, document management vendors have started to provide ways to connect or interface their software to an agency website. This feature allows the agency to pull documents right into the agency website without re-entering or uploading them a second time.

## DOCUMENT MANAGEMENT SYSTEM CONSIDERATIONS

There are some key considerations to look at when purchasing or updating a document management system. These factors also are important when using document management as a public engagement resource and linking it to the agency website. They include:

- Is there a way to allow public access to the system without compromising the agency's internal network?
- Can the system be modified to look like balance of the agency web site with style sheets?
- Can the document management system tie-in to other agency technology systems?
- Does the document management system offer additional features and modules that may cut costs and eliminate the need for other systems?

The value of incorporating document management into the agency website and the public outreach process can be significant. This makes it well worth taking the time to see what is possible.

# FOR MORE INFORMATION

## Agency Website Articles

How Seven Cities Designed Surprisingly Great Websites  
<http://gizmodo.com/how-seven-cities-designed-surprisingly-great-websites-1442572957>

Local Agency Website Transparency Opportunities  
[http://www.ca-ilg.org/sites/main/files/file-attachments/website\\_transparency\\_opportunities\\_0\\_0.pdf](http://www.ca-ilg.org/sites/main/files/file-attachments/website_transparency_opportunities_0_0.pdf)

San Carlos Uses Web Technology to Provide Information to Its Residents  
<http://www.ca-ilg.org/public-engagement-case-story/city-san-carlos-using-technology-provide-information-its-residents>

An Overview of Responsive Web Design  
[http://en.wikipedia.org/wiki/Responsive\\_web\\_design](http://en.wikipedia.org/wiki/Responsive_web_design)

Continuing Preference for Email  
[www.mckinsey.com/Insights/Marketing\\_Sales/Why\\_marketers\\_should\\_keep\\_sending\\_you\\_emails](http://www.mckinsey.com/Insights/Marketing_Sales/Why_marketers_should_keep_sending_you_emails)

## Award Winning Web Sites – Cities

City of Chula Vista – Highly visual homepage, pull down menus  
<http://www.chulavistaca.gov>

City of Citrus Heights – City Hall online for most common requests  
<http://www.ci.citrus-heights.ca.us/home/index.asp>

City of Los Angeles – Navigation designed from the user’s perspective  
<http://www.lacity.org>

City of Palo Alto – Can customize own version of the website  
<http://www.cityofpaloalto.org>

City of Riverside – Extensive online services/search; translation function  
<http://www.riversideca.gov>

City of Rocklin  
<http://www.rocklin.ca.us>

City of San Carlos  
<http://www.cityofsancarlos.org>

City of San Diego  
<http://www.sandiego.gov>

City of Santa Monica  
<http://www.santa-monica.org>

City of West Hollywood  
<http://www.weho.org>

## Award Winning Web Sites – Counties

Alameda County – Highlights commitment to social media and apps  
<http://www.acgov.org>

Nevada County – Has a “Participate” section on the main menu  
<http://www.mynevadacounty.com/>

Orange County – See “Access OC which makes it easy to interact with each department and offers FAQs)  
<http://www.ocgov.com>

Sacramento County  
<http://www.saccounty.net>

San Diego County  
<http://www.sdcountry.ca.gov>

San Francisco, City & County  
<http://www.sfgov.org>

San Luis Obispo County  
<http://www.slocounty.ca.gov>

Santa Clara County  
<http://www.sccgov.org>

## Web Award Programs

City-County Communications & Marketing Association – Savvy Awards  
<http://www.3cma.org/index.aspx?NID=59>

Center for Digital Government – Best of the Web & Digital Government Achievement  
<http://www.govtech.com/cdg/digital-government-achievement>

Web Marketing Association – Web Awards  
[http://www.webaward.org/winners\\_detail.asp?yr=all&award\\_level=best&category=Government](http://www.webaward.org/winners_detail.asp?yr=all&award_level=best&category=Government)

## Document Management Articles & Web Links

Document Management Systems  
[https://en.wikipedia.org/wiki/Document\\_management\\_system](https://en.wikipedia.org/wiki/Document_management_system)

How to Select The Right Document Management System  
<http://www.eweek.com/c/a/Enterprise-Applications/How-to-Select-the-Right-Electronic-Document-Management-System/>

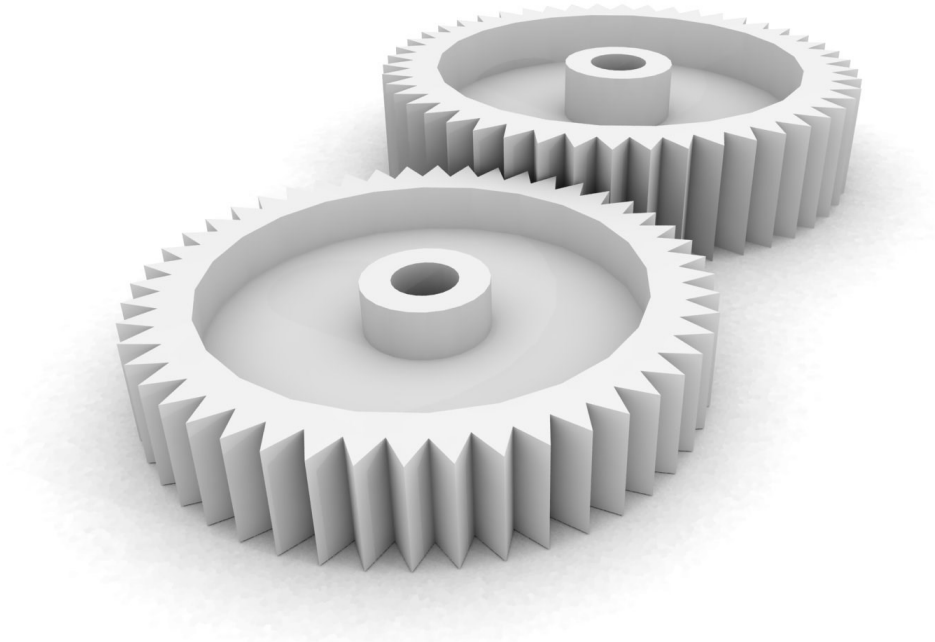


# MAKING THE DECISION PROCESS VISIBLE



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# TIPS



## **Agendas, Minutes & Staff Reports**

- Think through the use of meeting management software to automate the development of materials
- Utilize electronic packets enable the use of tablets for board members vs. large paper packets
- Consider posting the full packet for every commission and governing body meeting

## **Video**

- Index topics during the meeting so the public can jump to the desired item on the web
- Look for integrated video, meeting and document management features
- Videos of presentations at meetings or events can be pulled out to explain a proposal
- Consider short, “snackable” videos of 3-5 minutes or less to grab attention
- Options for HD video enhance the quality and interest in agency videos
- Consider developing a city or county branded channel for the internet

## **Webinars and Virtual Meetings**

- Allows public participation from the comfort of home or office
- Includes the ability to have public comments and participation via phone and/or email
- Allows video of presenters and multiple presenter locations

Providing detailed information about a proposed project, development or program is a key aspect of public engagement. Technology can be used to provide more information including updates to the proposals, documents and reports, videos, agendas, minutes and background information.

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# AGENDAS, MINUTES & STAFF REPORTS

Prior to holding a commission or governing body meeting, local agencies post agendas with the meeting topics. Meeting materials for commission and governing body members also include minutes of the actions at the prior meeting and staff reports and attachments on the items to be discussed.

In recent years, most cities and counties have been using meeting management software that allows the agency to automate the meeting agenda and staff report preparation process. This also has the benefit of making meeting packets fully electronic. Electronic packets enable commission and governing body members to get their meeting materials on a tablet or laptop vs. the prior practice of printing large stacks of paper for each meeting. Electronic packets also facilitate posting the agendas, minutes, reports and attachments.

Most agencies go further by posting the agenda, minutes, staff reports and every document and attachment for all commissions and the governing bodies on their websites to enhance public information and transparency. Some software allows members of the public to provide “ecomment” while viewing a given agenda or report.

## MEETING VIDEOS & CABLECASTING

The next step forward for many agencies has been to acquire technology that lets them broadcast governing body and commission meetings live on both the City and County TV Channel and the internet. This technology typically consists of video hardware at the local agencies chambers or meeting rooms, cameras, audio equipment and software.

Video and cablecasting systems offer some interesting capabilities. These systems also can interface with the agency’s meeting management and document management systems enabling a viewer on the internet to access the meeting video, agenda and meeting materials all on one screen. They allow the video to be indexed so that when it is accessed after the meeting, members of the public can jump to the agenda item of interest rather than watching the entire meeting.

Some systems also have “clipping tools” which allow agency staff to easily create small standalone 2 to 3 minute videos from the meeting or workshop for later use on the City or County TV Channel and website. These small videos are sometimes referred to as “snackable videos” and can tell a story or catch attention much better than simply posting the entire video of a discussion or presentation.

In some cases, meeting video broadcasting – or cablecasting– is now a standard feature in many meeting management and document management systems. As a result, if a city or county is using document management and/or meeting management systems, it probably has video broadcasting capabilities as well. [Orange County’s “online government channel”](#) is one example of this.

# WEBINARS & VIRTUAL MEETINGS

Another area that can enhance public engagement is the use of webinars and virtual meetings. Here the goal is to tell the story and share information with the public in a program or proposed project or development without the need for interested parties to come to a traditional meeting or workshop. Instead, the agency can share the information over the telephone or internet and the public can view it. This format enables the public to participate from the comfort of their home, office or any location with internet access via electronic messages and/or verbal comments during the event.

Webinars (originally known as “web conferences”) have been available for a number of years and can be set up quite easily. They allow the agency and public to communicate over a phone line. With the addition of the internet, webinars can be enhanced by presenting visuals including PowerPoint slides, maps and diagrams relevant to the topic at hand.

Along the same lines, newer technologies allow anyone to setup and host a virtual meeting. The advantage of this approach is that it allows the participants to not only hear information and view a presentations but it also provides video of the presenters to all participants. Another advantage of this approach is the ability of presenters to participate from multiple locations.

## HIGH QUALITY VIDEO

In recent years, the cost of adding high definition (HD) video cameras and technology has dropped significantly. This has encouraged cities and counties to begin recording and broadcasting in HD video as well as higher quality standard definition (SD) video.

Cable TV and phone company video systems can offer viewers HD quality on commercial channels, but they do not usually make this playback quality available to cities and counties. Agencies can avoid this quality bottleneck by taking HD videos and posting them on the internet through video services. As an added bonus, these companies offer agencies the opportunity to create and brand their own video channel.

## CITY AND COUNTY TV CHANNELS

In California, cities and counties have the right to program three government, education and public access channels operated by the local cable TV and phone companies. A fourth channel is also available once the first three are programmed with at least 56 hours per week of content. These channels initially were part of local cable TV franchises. Today that availability has been written into State Law as part of the State Video Franchising Law also known as DIVCA. (A summary of the provisions of AB 2987 of 2006 or DIVCA is attached to this article).

These channels initially featured live and taped broadcasts of agency meetings and presentations such as the annual State of the City or County speeches. More recently, agencies have used their government access channel to share other information about the agency.

Agencies can consider including information about proposed developments, programs and projects on these channels. This can be as simple as developing a one page slide with basic information on the proposal and upcoming workshops and meetings for the public to attend. It can also extend to short or even extensive videos on the proposal or program.

# **AGENCY VIDEO CHANNELS, COMPUTERS & MOBILE DEVICES**

There are several advantages of considering making videos available on video services offering high quality hosting and playback over the internet. Videos at full SD and HD quality levels are much crisper and easier to watch, especially in full screen mode.

These hosted videos can also be watched on a home big screen HD TV using an internet connected TV device in full quality – or on a smartphone, tablet, laptop or desktop computer. As more residents watch videos on these devices – instead or in addition to their TV sets, adding this option becomes very interesting. It is also worth noting that as the cost of creating and making better quality videos continues to drop, finding ways to share better quality and better looking information on agency programs it is an option to consider to better inform and engage the public. A list of agencies that have developed agency branded channels is attached to this article.

# FOR MORE INFORMATION

**AB 2987 – Overview of State Video Franchising in California (DIVCA)**

<http://www.scannatoa.org/Documents/AB%202987/AB2987-Summary.doc>

**Americans Believe Mobile Devices Will Replace TVs**

<http://www.broadbandtvnews.com/2014/01/08/53-of-americans-believe-mobile-devices-will-replace-tvs>

**Finding the HBO or the Netflix of the Enterprise**

<http://gigaom.com/2014/01/19/finding-the-hbo-or-the-netflix-of-the-enterprise-what-weve-all-been-waiting-for/>

**Standard Definition TV**

[http://en.wikipedia.org/wiki/Standard-definition\\_television](http://en.wikipedia.org/wiki/Standard-definition_television)

**You Tube Video**

<http://en.wikipedia.org/wiki/YouTube>

## **Agency Video/TV Channels**

**Calabasas 3 - CTV**

[https://www.youtube.com/playlist?list=PLK\\_n\\_5OLuRnf\\_9T94Z658q9lpkB4RRvcP](https://www.youtube.com/playlist?list=PLK_n_5OLuRnf_9T94Z658q9lpkB4RRvcP)

**Cupertino City Channel**

<https://www.youtube.com/user/cupertinocitychannel?feature=watch>

**Garden Grove TV 3**

<https://www.youtube.com/user/GardenGroveTV3>

**Peninsula TV – San Mateo County/Cities**

<http://vimeo.com/peninsulatv>

**Public Cable TV Authority – Fountain Valley, Huntington Beach, Stanton, Westminster**

<https://www.youtube.com/user/PCTAtv>

**San Diego County – County News Center**

<https://www.youtube.com/user/countysandiego?feature=watch>

**San Francisco – SF Gov TV**

<https://www.youtube.com/user/SFGTV>

**Torrance CitiCable**

<https://www.youtube.com/user/TorranceCitiCABLE>

**Walnut Creek TV**

<https://www.youtube.com/user/CityofWalnutCreek>

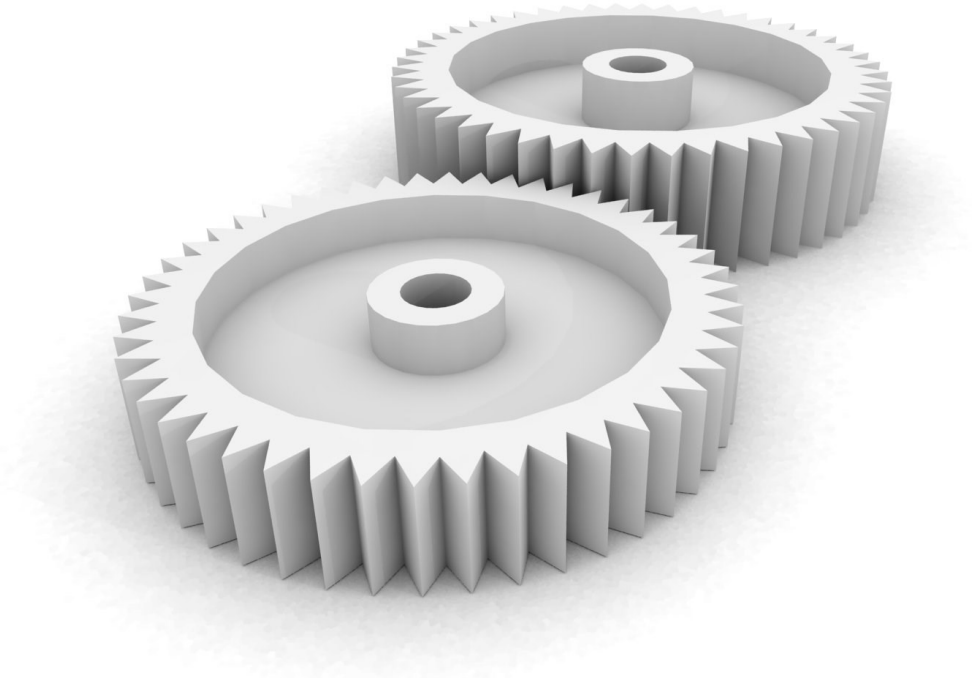
# GETTING THE WORD OUT



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# TIPS



## **Email Lists, Notification & Newsletters**

- Check website software to see what capabilities already exist
- Decide what type of notification to use
- Make sure the notification system does not require duplicate subscriptions

## **Blogs**

- Consider if the blog will enable comments on posts vs. an info only approach
- Think through if it may be preferable to create a blog for the program or proposal vs. using an existing blog

## **Social Media**

- Social media can bring a large audience to an agency's information & meetings
- Some agencies create project or proposal specific Facebook pages
- Ability to re-use information but best to reformat it to fit each service's style and "vibe"

Another key area to explore is technologies and tools that help get the word out to the public to further encourage participation and provide information updates. Many local government agencies have an opportunity to dramatically increase awareness of meeting and workshop opportunities along with updates to the proposals, documents and reports.

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# SOME TRADITIONAL METHODS

While the focus of this series is on public engagement and technology, traditional methods of getting the word out are often underutilized. This includes posting meeting and workshop dates and agendas at agency buildings, making meeting materials available in hard copy form at libraries or community centers, notices in the local newspapers, mailed notices to residents and quarterly printed newsletters or utility inserts mailed to residents.

All of these approaches work and help to share information. Using them in conjunction with additional options available with technology enables a city or county to reach more people in the multichannel approach to public engagement.

## **NOTIFICATIONS, EMAIL LISTS & NEWSLETTERS**

Other ways that local agencies can get the word out about proposals and projects, materials and upcoming meetings include:

- **Notification Software** - Some software programs notify interested parties that a web page or pages have new information on them – but it is up to the person being notified to figure out what has been added or changed. This is the simplest approach to notifications but may result in calls to the agency as subscribers to the updates may not know what was added or changed.
- **Email Lists or Listserves** - These programs allow residents to subscribe to specific topics and types of documents. The software also allows the agency to add a brief write-up of each type of topic and document that can be subscribed to. Once the topic is updated or an article is added, the agency staff can cut and paste a description of the change, meeting or the document summary into an email notice. The next step is to check the list or lists that this material is sent to and the software does the rest.
- **Custom Newsletters** - While the email list programs often allow you to enter text or an alert, the agency may want something more complete or elegant. In those cases, several vendors offer programs that provide a combination of custom newsletters and email list distribution and tracking. This is another excellent way to get the word out on a proposal or meeting.
- **Sending Files & Documents** - In some cases, the agency may want to send a file or document to a list of subscribers. In addition to the approaches listed above, which drive the resident to the agency website and document management systems, links to file, document or presentation itself can be provided. This can be an interesting option if the document(s) are very large or not on the website or in the document management system. Some of these products also provide information on how many subscribers have accessed the document and allow expiring access to the documents after the workshop or meeting date has passed.

## WEBSITE

The first place to look at to disseminate information is websites. Website software for cities and counties often goes beyond basic features to include notification and distribution features. Key examples of these features worth considering:

- **Headlines & News** – Website software usually allows an agency to feature major programs and initiatives in a brief story on the main or “home” page. Visitors to the website will be drawn to this information when they visit the main page and will learn about the proposals or meetings that are coming up.
- **What’s New** – Websites often have a “What’s New” section that shows all of the pages or documents on the site that have been recently updated or added. Featuring new information on the proposal or meeting here will also draw attention for website visitors that check this section to see what is new.
- **Project or Meeting Sections** – Local agencies can create sections on their website that list meetings for commissions and governing bodies as well as each proposed project or development and its progress.

# BLOGS

A blog provides a series of articles on a variety of topics. Each article in the blog has an issue date and title and can also have features including web links, photos, graphics, videos and calendars.

Blogs can often be developed as part of a website. Another option is to use vendor software that typically comes with blog hosting services. In some cases, a single blog per email address is provided free to encourage exploring the concept with more advanced features carrying a cost. It is also worth noting that the cost of operating a blog can be very low (in some cases under \$20 per month) with the vendor providing security, bandwidth and storage for that cost.

Local agencies can use blogs for a variety of purposes. In some cases, they share information from the newsletter that is issued by the city manager or county executive or provide links to the latest news releases from the agency. For other agencies, they highlight programs or events in a specific department like police or human resources.

One of the more interesting uses of an agency blog is to highlight a specific program or proposal and describe it in some detail. The [City Manager Blog](#) in the Town of Atherton is a fine example of that approach.

When it comes to public engagement, an agency can use an existing blog to provide more details and explanation about an issue or program under discussion in that agency. The agency may also want to create a new blog that is specific to the proposal at hand to focus more attention on it and provide continuing updates.

# SOCIAL MEDIA

Social media services are another way to distribute information about proposals, projects, programs and meetings. This is increasingly true as more residents use smartphones, tablets, laptops and computers for information, news and to watch videos. For example, a Pew Research Center study found that 10% of people get their news today from Twitter while 30% get their news from Facebook. This demonstrates once again the importance of being multichannel and using different ways to distribute information.

While there are a number of social media services available to agencies, the three most commonly in use are Twitter, Facebook and LinkedIn.

## **TWITTER**

Twitter is referred to by some as a “micro blogging” service that features short updates. It has over 500 Million users worldwide.

Anyone can set up a Twitter account and begin posting messages at no cost. Messages or “tweets” are limited to 140 characters in length and focus on breaking news and updates. Photos may also be posted. Most agency twitter sites tend to be agency-wide in scope or to focus on areas like police, fire and other services.

It is important to use abbreviations and to link to more detailed source information on the agency web site and document management system to use Twitter to full effect. The posts can be created and read on a web browser or on a dedicated software program which offers additional features.

## **FACEBOOK**

Facebook also focuses on short messages but it does not have a strict message limit like Twitter does. This enables agency messages and updates to use full sentences and be more conversational in tone. Facebook has over 1 Billion users worldwide.

Facebook users also enjoy photos and videos making the system a more visual medium. Agency Facebook pages tend to be agency-wide but also focus on key service areas involving events and services with Parks & Recreation being an especially effective area here. In some cases, agencies will create a dedicated Facebook page for a long-term initiative or annual program versus solely publicizing it on the agency Facebook page.

## **LINKEDIN**

LinkedIn is a business-oriented social networking service and is mainly used for professional networking that now has more than 259 million members in over 200 countries worldwide. LinkedIn can be used to advertise agency job openings, connect with other local agencies and disseminate information to residents. LinkedIn now also supports the formation of interest groups. Local agencies can form groups on LinkedIn and use this channel to ensure the group members are kept informed through emails with updates to the group, including most talked about discussions within their professional circles.

# SOCIAL MEDIA CONSIDERATIONS

When using social media as part of a public engagement program, there are some things to keep in mind:

- As with in person engagement, it helps to go where people already are. Start by “listening” online to conversations taking place where people are thinking about issues related to yours.
- Meeting and workshop announcements do not tend to be big traffic drivers. It is best to add this information to existing sites that already have an audience.
- If possible, post project or program information on the agency’s existing social media pages versus creating a new project-specific page. This will eliminate the need to build an audience for the site to be effective.
- Re-format announcements on meetings and the project or proposal for each site. The two services are different and there is an expectation that agency posts are not “just duplicating the website.”
- Since social media outlets feature short messages and posts, make liberal use of links to the agency web site and document management system where the full detail of a proposal and complete reports, documents and visuals are stored. This allows the agency to drive residents that do not visit the website often to the source documents.
- Providing program visuals, graphics, photos and maps helps grab attention and interest.
- Some cities and counties retweet or repost stories of what their partners outside of local government are doing to help build a tone of collaboration.

Following these tips can result in more awareness among residents about the project or proposal under consideration. It will enhance a public engagement program and bring residents that may use the agency website sparingly, if at all, into the discussion. A goal that is well worth attaining.

# FOR MORE INFORMATION

## **Best of 2010: State and City Blogs**

<http://www.govloop.com/profiles/blogs/best-of-2010-state-and-city>

## **Boston Mayor Launches Transition Blog**

<http://www.governing.com/topics/politics/gov-boston-mayor-blogs-out-of-office.html>

## **Agency Blogs**

### **Town of Atherton**

<http://ca-atherton.civicplus.com/Blog.aspx?CID=1>

### **City of Brisbane**

<http://www.brisbaneca.org/blog>

### **City of Hayward**

<http://www.hayward-ca.gov/citymanager/index.php/category/general-topics/>

### **City of Redwood City**

<http://redwoodcitypd.blogspot.com/>

### **City of Riverside**

<http://riversideca.gov/cmblog/>

### **City of Sunnyvale**

<http://sunnyvale.ca.gov/Newsroom/CityManagersBlog.aspx>

### **San Mateo County**

<http://hr.smcgov.org/employee-success-blog>

## **Facebook & Twitter: Articles & Books**

### **Legal Issues Associated with Social Media**

<http://www.ca-ilg.org/document/legal-issues-associated-social-media>

### **Spotlight on Marin County's Social Media Efforts**

<http://www.ca-ilg.org/post/spotlight-marin-countys-social-media-efforts>

### **Who Gets Their News from Twitter?**

<http://www.govtech.com/internet/Who-Gets-Their-News-from-Twitter.html>

## **Social Media Websites**

### **Facebook**

<http://www.facebook.com>

### **Hoot Suite**

<https://hootsuite.com/features/social-networks>

### **Tweetdeck**

<https://about.twitter.com/products/tweetdeck>

### **Twitter**

<http://www.twitter.com>

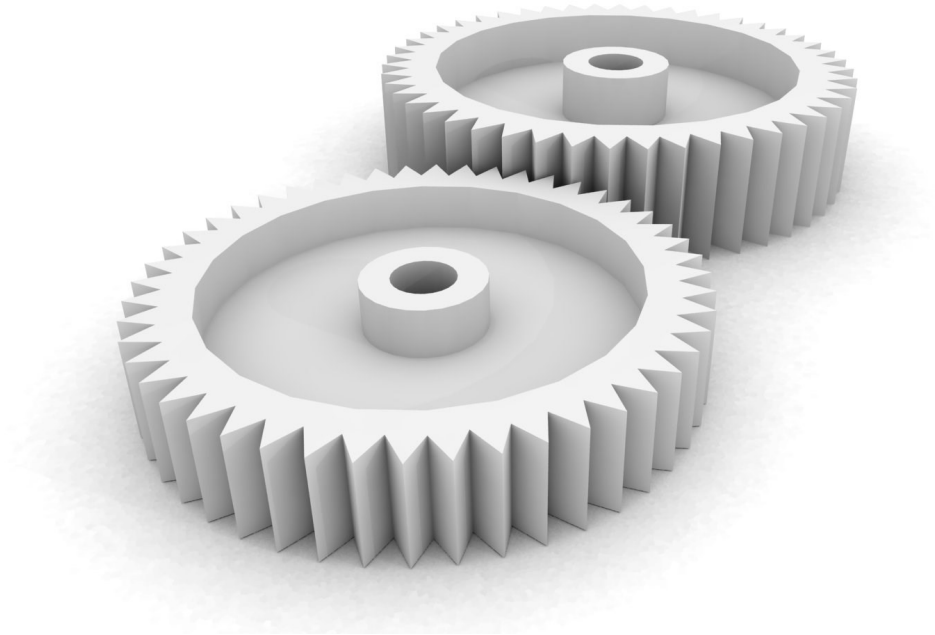
### **LinkedIn**

<http://www.linkedin.com>

# INVITING PUBLIC INPUT



# TIPS



## **Surveys**

- Web surveys are low cost and can provide a quick way to get comments on a proposal or more detailed assessment of attitudes
- Agencies can use web surveys to either precede or follow-up workshops and meetings
- Agencies can take steps to make the responses more representative of the community

## **Online Consultation and Idea Generation**

- Hosted forum software can facilitate the process of obtaining ideas and input
- Many agencies leave the software on-line after the comment period has closed
- New approaches include mobile-friendly technologies plus budget games and simulations

The focus of this series so far has been on providing background information, holding and publicizing meetings, documenting the results of those meetings and obtaining participation through technologies related to these aspects of public engagement. For many public issues, this is not enough. An agency may want to get additional input and views on a proposed project, program or development. The good news is that there are tools and technologies which can help in getting more input.

#### **About the Institute for Local Government**

ILG is the nonprofit 501(c)(3) research and education affiliate of the League of California Cities and the California State Association of Counties. For more information and to access the Institute's resources on Public Engagement and technology visit [www.ca-ilg.org/public-engagement-technology](http://www.ca-ilg.org/public-engagement-technology). To access this resource directly, go to [www.ca-ilg.org/providingandstoringdetailedinformation](http://www.ca-ilg.org/providingandstoringdetailedinformation).

- The Institute welcomes feedback on this resource:
- Email: [info@ca-ilg.org](mailto:info@ca-ilg.org) Subject: Providing and Storing Detailed Information
- Mail: 1400 K Street, Suite 205 • Sacramento, CA • 95814

#### Acknowledgements

##### Primary Author:

- Brian Moura, consultant to Local Government Agencies specializing in Management, Finance, Economic Development and Civic Engagement

##### The Institute is grateful to the following reviewers:

- Susan Stuart Clark, Civic Engagement Consultant
- Jasmine Frost, IT Manager City of San Carlos

# ONLINE SURVEYS

Many local agencies have hired survey research firms for the purposes of assessing resident satisfaction with services and to gain input on priorities for strategic planning and budgeting. Professionally administered surveys are also very helpful when weighing voter attitudes and opinions about potential ballot measures involving revenue measures and major projects in the community.

For some projects, another approach to get public input is to use less formal web or text-based survey tools. The advantage of these tools is that the content of the survey can be developed by any member of the agency staff because very limited technical knowledge is required to have a good interface for the public. Depending on the type of feedback desired, the survey can be just one or two questions, or involve more thoughtful preparation. The software cost is minimal (and in some cases free) and these surveys can be publicized on websites and social media. If it is a quick question, responses can be obtained in as little as 24 to 48 hours and even smaller cities and counties often receive hundreds of responses to such inquiries very quickly.

A web based survey will not have the demographically balanced sample of professional research and the results will need to be interpreted accordingly. But a staff-developed web-based survey can still be a very useful tool, especially keeping in mind the following best practices:

- Keep the survey short so that it takes just a few minutes.
- Include a few questions to know if there is a mix of residents (such as age, zip code and any other factors important to the topic).
- Pre-test the questions with a few community members to make sure they are clear and understandable.
- Announce the survey through multiple channels plus local media, and get community partners to put the link in their communications too.
- Monitor responses to see if the survey needs to be sent to specific sectors of the community to get more balance.
- Be careful about the timing of surveys; reporting closed-ended results creates specific expectations.

Web-based surveys can be a very helpful supplement to the agency's earlier meetings, workshops and outreach work. In some cases, if an agency has not reached a number of key stakeholders, a web based survey is an excellent next step before the outreach program is complete. Alternately, some agencies like to do the survey at the beginning of an outreach process to understand initial attitudes and perceptions and then move to more information –rich consultation tools to engage a more informed public.

# ONLINE CONSULTATION, FORUMS & IDEA GENERATION

In the last couple of years there have been several vendors that have come on to the market with hosted discussion and idea generation products that start around \$1,500 in cost. These software programs can be linked to a city or county web site and allow the agency to post information and pose questions to the public about programs and proposals and obtain input – typically during a set time period.

The software enables the agency to easily capture responses and analyze statistics. In many cases, these forums remain available for viewing on the agency web site even after the comment period has ended. Examples of questions posed by cities and counties in California with these hosted products include:

- Issue Specific
  - What are your views on a proposed ordinance limiting smoking in specific areas?
  - What are key land use, transportation and economic issues?
- Quality of Life
  - How should the City celebrate the 4<sup>th</sup> of July?
  - How would you prioritize amenities for the downtown?
- Budget
  - How would you prioritize the Items in the 2014-15 Budget?
  - What do you think of the proposed parking fees for downtown garages?

# **NEW APPROACHES TO IDEA GENERATION & BUDGET DISCUSSIONS**

There are also some interesting new approaches to generating ideas and making citizen input easier. Multiple vendors are focusing on the increasing use of smartphones and tablets with a mobile friendly citizen input tool. Software allows questions to be pushed directly to the devices of residents that sign-up for surveys and then facilitates a direct reply on these devices, eliminating the need to visit the agency web site.

Another approach involves the use of budget simulations and games to obtain citizen input and ideas. These products follow models initially available to allow citizens to comment on the state and federal budgets and solve these budget deficits by moving program elements up, down or out of the proposed budget. Comparable tools, simulations and games are now available for licensing and use by cities and counties in budget outreach work.

# FOR MORE INFORMATION

## Online Forums & Input Articles

### El Cerrito Uses Web Site Software to Create Community Voice Feature

<http://www.ca-ilg.org/public-engagement-case-story/city-el-cerrito-engages-residents-five-year-strategic-planning-process>

### San Jose Invites Citizen Input on Prioritizing City Services Using Budget Game

<http://www.cafwd.org/reporting/entry/san-jose-invites-citizen-input-on-prioritizing-city-services>

## Agency Web Sites – Online Forums & Input

### City of Fremont

[http://www.fremont.gov/index.aspx?NID=1623&pd\\_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F118%2F1217](http://www.fremont.gov/index.aspx?NID=1623&pd_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F118%2F1217)

### City of Los Angeles

<http://ideas.la2b.org/>

### City of Oakland

<http://www.engageoakland.com/>

### City of Palo Alto

[http://www.cityofpaloalto.org/gov/topics/open\\_city\\_hall.asp?pd\\_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F5%2F902](http://www.cityofpaloalto.org/gov/topics/open_city_hall.asp?pd_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F5%2F902)

### City of Rancho Cordova

[http://www.cityofranchocordova.org/Index.aspx?page=732&pd\\_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F141%2F1379](http://www.cityofranchocordova.org/Index.aspx?page=732&pd_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F141%2F1379)

### City of Sacramento

<http://www.envisionsacramento.com/>

### City & County of San Francisco

<http://www.improvesf.com/>

### City of San Ramon

[http://www.sanramon.ca.gov/opensr/?pd\\_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F117%2F1013](http://www.sanramon.ca.gov/opensr/?pd_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F117%2F1013)

### City of Sausalito

<http://www.peakdemocracy.com/portals/136/1349>

### City of Vallejo

[http://www.ci.vallejo.ca.us/living/open\\_city\\_hall?pd\\_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F109%2F947](http://www.ci.vallejo.ca.us/living/open_city_hall?pd_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F109%2F947)

### City of Walnut Creek

[http://www.walnut-creek.org/citygov/opentownhall.asp?pd\\_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F125%2F1233](http://www.walnut-creek.org/citygov/opentownhall.asp?pd_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F125%2F1233)

### City of Yucca Valley

[http://www.yucca-valley.org/departments/gpu\\_forum.html?pd\\_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F107%2F917](http://www.yucca-valley.org/departments/gpu_forum.html?pd_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F107%2F917)

### Humboldt County

[http://co.humboldt.ca.us/openhumboldt/?pd\\_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F131%2F1189](http://co.humboldt.ca.us/openhumboldt/?pd_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F131%2F1189)

### Marin County

[http://www.marincounty.org/openmarin?pd\\_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F71%2F1202](http://www.marincounty.org/openmarin?pd_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F71%2F1202)

### Santa Cruz County

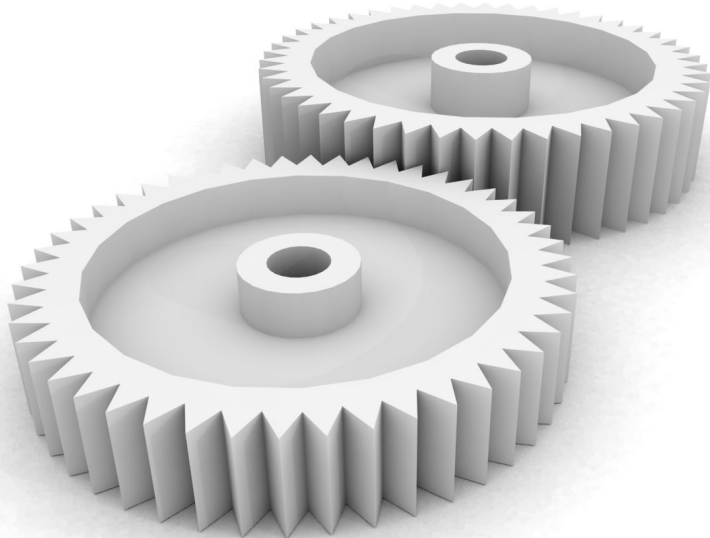
[http://www.sccoplanning.com/PlanningHome/LongRangePlanning/ClimateActionStrategy/OpenTownHall.aspx?pd\\_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F110%2F926](http://www.sccoplanning.com/PlanningHome/LongRangePlanning/ClimateActionStrategy/OpenTownHall.aspx?pd_url=http%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F110%2F926)

# EMERGING TECHNOLOGIES



INSTITUTE FOR  
LOCAL GOVERNMENT<sup>SM</sup>

# TIPS



## **Open Data**

- Agency data becomes more accessible with viewers and computer readable datasets
- Agency's should explore what information could be shared that is of high interest
- An opportunity to enhance public trust through transparency and better involve the public in discussions on the budget and projects
- Data must be provided in accessible formats for community use

## **Code for America**

- Partners with cities and counties to build applications to solve problems
- Holds a competitive process to obtain free Fellows each year
- Offers free resources for all interested cities and counties
- Creates new software companies and jobs

## **Applications & Magazines**

- Agency staff can take blogs, web site information and convert them into apps
- High quality and colorful magazines can be created using web site & blog feeds
- Large amounts of agency information or smaller project-specific sets can be used

## **Beyond High Definition Video**

- Smartphones, laptops and desktop PCs are offering beyond HD quality video
- New products are coming to capitalize on this with beyond HD support
- This will be an opportunity for agency videos to really stand out via internet streaming



The articles in this series have focused on technologies available to local agencies that can enhance public engagement efforts. This section will explore some of the newer opportunities that place the public in the role of providers and/or analyzers of civic information – not just passive consumers.

As the IT world changes, more data is managed with open source, cloud-based computing that changes the landscape of local technology. Instead of relying solely on large IT contracts and a rigid procurement process, some aspects of local government information can now be opened up to community member volunteers to help generate the data (e.g., via mobile apps), and analyze the data via more uniform APIs (Application Programming Interface). Instead of using fixed IT resources to manage data, now cities and counties are examining whether and how to shift their role to being a collaborator and coordinator with outside partners.

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# OPEN DATA

Open Data is a term that refers to making information freely available on the internet. As it applies to local government agencies, it covers agencies that post information in a form that can be analyzed and viewed by a variety of computer programs.

Typically this means providing agency information in maps, charts, tables, datasets, calendars, documents and forms rather than a static, difficult to edit format. Once information is made available in this manner, residents can view and analyze the data and software companies can develop new programs that use this data.

When deciding what information to make available to the public, agencies will want to consider what programs and work the agency does that the public would like to learn about at a more detailed level. In addition to enhancing transparency, some agencies believe open data programs could result in a reduced level of Public Records Act requests in the future.

In terms of sharing information, local agencies will also need to look at many of the same considerations and rules they follow when requests are made for other types of information. This includes following local ordinances and state laws regarding information that must be kept confidential because it is deemed to be confidential, proprietary or protected by law vs. what information is part of the public record and can be disclosed and shared upon request.

Local governments will want to work closely with their agency counsel for guidance in developing an open data policy. The reference section of this article includes some good articles and guides that can help you address this area when developing an open data policy and program.

A good piece of advice that balances these considerations and requirements can be found in the Open Data Policy from San Mateo County that has been highlighted by the Sunlight Foundation. The county's policy says, in part:

*“The County’s Open Data Committee will be responsible for...developing standards to determine which data sets are appropriate for public disclosure, by balancing the benefits of Open Data with the need to protect disclosure of information that is confidential, proprietary, or protected by law.”*

Examples of Open Data available today from cities and counties include:

- Annual Budget and Financial Data
- Police Department Location of Crime Maps
- Service Requests Received by the City
- Parking Spaces in the City in a Dataset
- Location of Building Permits Issued
- Maps of City Parks and Recreation Sites
- List of Food Trucks with Permits
- List of Certified Green Businesses

There is a wide variety of information being shared with the public and software vendors. In many cases, this information is already on the agency website or document management system. So it is often a case of converting the report or information from its current format (like a document or a spreadsheet) into an open data usable table, dataset or map.

While the initial push for open data involved simply making these datasets available in computer-usable form, some cities and counties are now offering viewer and dashboard software along with the information on agency web sites. Products with these capabilities start at approximately \$750 per month, depending on features and the size of the open data collection. This enhancement is a step forward for open data in that it allows anyone to view the data without doing their own manipulation on a spreadsheet, database or mapping program on their computer.

Generally speaking, open data is usually part of an agency's program to enhance transparency and information sharing with the public rather than public engagement. However, it can play a role in some of an agency's public engagement work as well.

In terms of public engagement, one of the first uses of open data has been to encourage discussion of the agency's proposed budget. However, an agency can post datasets that relate to specific projects or proposals in an existing open data system and viewer and then link to it on the project's web site or discussion area. There are some interesting possibilities here as open data becomes more prevalent in cities and counties. A key challenge is to make sure that the release of data comes in forms and formats that make sense to the desired public audiences.

# CODE FOR AMERICA

Code for America is a 501 (c)(3) non-profit that is exploring how technology can help government operate more collaboratively and effectively. The organization's signature Fellows program provides technology volunteers to partner with a government agency. These volunteers develop applications that connect residents with their city or county and new companies that will provide or sell technology products to the public sector. In some instances these software programs utilize open data. It is an interesting initiative that is helping to source outside talent to help solve problems for agencies and create new software businesses as an economic stimulus at the same time.

To participate in the Code for America Fellows program, an agency completes an application form that describes the challenge they face and how technology may solve it. From the applications received, Code for America selects several projects to take on each year. Examples of problems solved by their software include:

- Obtain feedback from the public
- Make it easier to make service requests to an agency
- Find a service that addresses a resident's problem
- Create a database listing of public art
- Allow a discussion forum to crowdsource ideas, share assets or manage feedback
- Generate up to date information on blighted properties
- Streamline the process for new businesses to obtain permits and licenses
- Manage police arrest warrants, improving real time information

Code for America also has local "brigades" of coding volunteers and enthusiasts available to interested local governments, whether or not they have a Fellows program. The organization also offers a Peer Support program for local governments.

# CREATING APPLICATIONS AND MAGAZINES

While the initial focus of open data efforts was on partnerships with software vendors, hack-a-thons and nonprofit groups like Code for America or local “brigades,” there are some additional possibilities. Once an agency has tables, lists and budget information in computer usable form, the agency itself can also develop mobile applications. Initially this could involve tech staff from the Information Technology department or a contract with a software development company. San Diego County has developed an app center (<http://www.sdcounty.ca.gov/appcenter/index.html>) to allow residents to access county information and services such as emergency services, county news and beach water quality while on the go.

More recently, several products and technologies have emerged that offer non-technical users the possibility of developing apps and magazines. These products can be used to pull together information and data on a specific topic or proposal, making them an interesting avenue for better public engagement.

One example of this new area involves taking blogs or websites and converting them into a dedicated app. The software starts with this information and then allows the user to add graphics, images, web links and menus before the entire collection of information is converted into an app usable on a smartphone, tablet, laptop or PC.

Another example involves programs that aggregate content from various sections of a website and blogs into a magazine. These electronic magazines are touch-enabled and feature web links, and very high quality fonts and images. In short, information becomes a glossy electronic publication with some initial formatting and design and no programming required.

Time will tell how often new technologies and programs like this are used. One approach is to bundle a considerable amount of information about a city or county into such an app or magazine. However, an agency could also develop an app or magazine for a specific project or proposal – or a major initiative like the General Plan update, and create a very colorful and compelling new way to learn about and view the proposal and its process as it proceeds.

# BEYOND HIGH DEFINITION VIDEO

Video technology continues to advance in the home TV, smartphone and computer markets. Vendors are exploring avenues with laptops and workstations for publishing, CAD and engineering applications that exceed retina display levels to full 4K video quality coming as soon as the summer of 2014.

So even though recording and posting HD videos is looked at as state of the art today, upcoming TV sets and laptops will be able to display even higher quality video in the very near future. This indicates that there will be an opportunity, as the prices of these products drop in the future, for local agencies to record and stream their meetings, workshops, events and educational videos in even higher quality. It will be an interesting option for agencies that is likely not that far off – and it will supply dramatically sharper and more detailed videos.

# FOR MORE INFORMATION

## Open Data Articles

**City of Palo Alto's CIO Explains the Benefits of Open Data**  
<http://gigaom.com/2014/01/02/the-city-palo-altos-cio-explains-the-benefits-of-open-data/>

**Google Wants the Government's Open Data**  
<http://www.forbes.com/sites/jeffcmahon/2013/11/03/google-wants-the-governments-data-on-you/>

**Knight Foundation Announces New Funding for Open Data Effort**  
<http://civsourceonline.com/2013/10/29/knight-foundation-announces-new-funding-for-open-data-effort/>

**Los Angeles Mayor Calls for Open Data Policy**  
<http://civsourceonline.com/2013/12/19/los-angeles-mayor-calls-for-open-data-policy/>

**Open Budget Application Improves Palo Alto, Calif.'s Accessibility**  
<http://www.govtech.com/budget-finance/Open-Budget-Application-Improves-Palo-Alto-Califs-Accessibility.html>

**Open Civic Data and the Human Services — Looking Beyond Today's Flea Market**  
<http://humanserviceinformatics.wordpress.com/2014/01/16/open-civic-data-and-the-human-services-moving-beyond-the-flea-market/#>

**Open Data Roundup: Hacks, Apps, Sundry-thons**  
<http://civsourceonline.com/2014/01/22/open-data-roundup-hacks-apps-sundry-thons/>

**Public Engagement in Budgeting**  
[http://www.ca-ilg.org/sites/main/files/file-attachments/community\\_budget\\_112013.pdf](http://www.ca-ilg.org/sites/main/files/file-attachments/community_budget_112013.pdf)

**What Code for America Has, and Hasn't, Learned About Getting "Beyond Transparency"**  
<http://techpresident.com/news/wegov/24533/book-review-what-code-america-has-and-hasnt-learned-about-getting-beyond-transparency>

## Open Data Policies

**Sample Open Data Policies from the Sunlight Foundation**  
[https://docs.google.com/spreadsheet/ccc?key=0Ap0CEAgs-R\\_odFc0Qk1WNHdIUDE3bUNVd1U3WUlnbIE#gid=0](https://docs.google.com/spreadsheet/ccc?key=0Ap0CEAgs-R_odFc0Qk1WNHdIUDE3bUNVd1U3WUlnbIE#gid=0)

**Open Data Policy – San Mateo County**  
<https://data.smcgov.org/Government/San-Mateo-County-Open-Data-Policy/pebe-j2ye>

**Open Data Policy Guidelines**  
<http://sunlightfoundation.com/opendataguidelines/>

## Agency Open Data Web Sites

**City of Cupertino**  
<http://data.cupertino.org/home/>

**City of Oakland**  
<https://data.oaklandnet.com/browse?utf8=%E2%9C%93&page=11>

**City of Palo Alto**  
<http://paloalto.opendata.junar.com/>

**City of Sacramento**  
<http://data.cityofsacramento.org/home/>

**City & County of San Francisco**  
<https://data.sfgov.org/>

**City of San Jose**  
<http://data.sanjoseca.gov/home/>

**City of Santa Cruz**  
<http://data.cityofsantacruz.com/>

**Alameda County**  
<https://data.acgov.org/>

**San Mateo County**  
<https://data.smcgov.org/>

**State of California**  
<http://data.ca.gov/about/>

**U.S. Government**  
<http://www.data.gov/>

## Creating Applications & Magazines Articles

**Flipboard Launches User-Created Magazines**  
<http://www.engadget.com/2013/03/26/flipboard-user-created-magazines-etsy/>

**How to Convert Your WordPress Blog into a Mobile App**  
<http://www.warriorforum.com/articles/536131-how-convert-your-wordpress-blog-into-mobile-app.html>

**Microsoft's Project Siena: A Metro-Style App for Creating Windows 8 apps**  
<http://www.zdnet.com/microsofts-project-siena-a-metro-style-app-for-creating-windows-8-apps-7000024507/>