



Rules: Guidance from The Consultation Institute

When done properly online consultation furthers the sound of public dialogue and is far more efficient than its offline older brother. It can have its drawbacks, too, reducing genuine two-way conversation and producing data that is tough to analyse. The Consultation Institute has published a useful code of practice, distilled below, to complement its wider principles:

A. When to use online consultation

1. When the views you get might actually influence decisions
2. As part of a mixed bag; traditional consultation methods like face-to-face meetings remain very important, especially for stakeholders who can't easily use the internet
3. When carrying out a survey or questionnaire. Surveys and questionnaires are the most popular forms of online consultation. Forums and conversations can also be valuable. Beware of trolls and the need to moderate them.
4. To target certain groups. Rather than going in with a scattergun, think carefully about whose views you seek and how they are likely to respond to being asked for them
5. When it will reach more people or elicit better responses
6. When you can consider using mobile applications to widen participation
7. To integrate gaming technology, such as budget simulators, make your consultation more appealing.

B. How to do online consultation

3. You need to use or create a robust platform that is accessible to as many people as possible.
4. Encourage people to register on your website. This will discourage trolls and make it easier to keep in touch with respondents. Bear in mind that if the matter at hand is very sensitive some people might not want to respond if they can't remain anonymous.
5. Inform people about the issues you are consulting them on, via your own narrative or links to external resources.

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6. The courts use the 'Gunning Principles' to decide if a consultation is lawful. The Second Gunning Principle holds that consultees must be given enough information to enable them to give intelligent consideration to the issue at hand. That means information needs to be readable and balanced.
 7. Phrase online surveys with great care so as to avoid ambiguity. Any closed answer options should be as near as possible to ones people would give if they could answer freely. Pilot phases are invaluable in designing these correctly.
 8. Recognise that for controversial issues you will need technology that can cope with the huge number of people and campaigns that might get involved.
 9. Consider integrating your online consultation with a social network consultation so as to widen the conversation.
 10. Beware crude 'quick polls' because they feel like referendums instead of proper public dialogues which can put people off.
 11. Decide on how much of your consultation to make public. For example, more people sign online petitions when they can see the number of others who have too, and people can be biased by the views of others. Whatever you decide, make sure you explain to each person your policy and methods.
- C. How to analyse and use the data**
4. Get the analysts involved in designing the consultation
 5. You may need to exclude some contributions if they come from people not entitled to participate or transgress other parameters, and the rules on eligible date have to be transparent
 6. After taking the time to participate, people expect to see the results of an online consultation: a full analysis of who responded, what their views were and how they will be considered by decision-makers.
 7. So as to encourage people to base their answers on their own knowledge and experience, be cautious before allowing people to first see the views of others
 8. Consider the resources you will need to do a proper analysis. E-survey tools contain powerful analytics, but the best consultation information is often qualitative, in which case you'll very likely need human power too.

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If you want to use a quote from a respondent you will need to get their permission first. Have a look at [this guidance](#) from the Market Research Society.

Try and make sure your respondents are representative of an area. For example, campaigners can have had a big effect on the balance of responses. You might be able to isolate campaigners and compare their responses with a control sample. Where this is a significant issue, you might need to consider doing an opinion research exercise based on a structured sample.

The Consultation Institute also offers four principles on consulting using social media.

- 1. Provide training:** Help your colleagues to take extreme care when writing comments and responses, as once written they are “out there” and may be impossible to erase
- 2. Evaluate impact:** Social media has a casual, transitory feel to it, but that shouldn’t stop you undertaking a careful appraisal of how things are going
- 3. Monitor new developments but be cautious in deploying new tools:** Try and keep an eye on the hottest new thing but avoid opening up channels that you won’t be able to maintain. Be sure to pilot new methods before making them standard practice.
- 4. Agree responsibilities and keep under review:** While day-to-day social media communications might be handled by one department, another department may handle individual consultations. Be clear on who is in charge of what.

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