

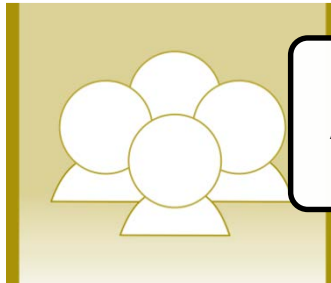
# Seven-Step Guide to Community Engagement

Step 1



Identify Topic and Team

Step 2



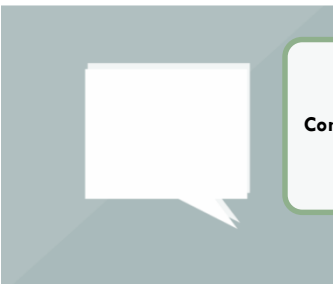
Identify Audiences

Step 3



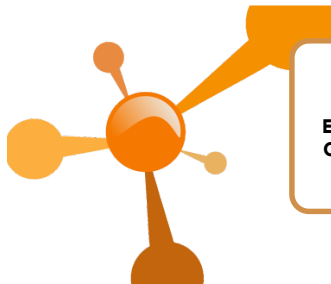
Identify Tools & Techniques

Step 4



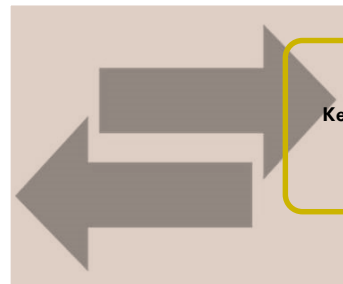
Make Communication Plan

Step 5



Maximize Engagement Opportunity

Step 6



Keep Lines Open

Step 7



Identify Evaluation Criteria

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## Introduction

Community engagement, also known as civic engagement, is defined as public involvement in local planning and decision making. It is an integral part of good governance. This guide is intended to be a reference that outlines the seven basic steps for county departments and/or teams to take when working to connect, communicate and collaborate with citizens in efforts to enhance county planning and decision making.

Effective engagement ensures the community has contributed ideas and knowledge to the decision-making process. While engagement does not guarantee consensus, it does ensure county decision makers are well informed.

Steps within this guide are purposefully brief to enhance the guide's use as a tool. Engagement is not one size fits all, so this guide may be modified to meet the needs of those who apply it.

This guide is specifically designed to help teams:

- Drill down topics and identify team members
- Define target audiences and determine desired levels of engagement
- Identify engagement tools and meeting facilitation techniques
- Develop a communication outline or plan
- Make the most of an engaged audience
- Maintain open communication with an audience
- Develop short- and long-term criteria to measure results

Accompanying this guide is a worksheet to assist teams in navigating the engagement process.

## Step 1: Define the topic and identify team members

A critical step in any effective engagement project is defining the topic, which usually requires some drilling down. It's important to be selective and focused on an issue's scope. A topic that is too broad or vague will likely show few results. Likewise, selecting a topic with too narrow a scope may not draw the amount of engagement that is desired or needed.



Once the topic is defined, identify team members who should be involved in the process based on their knowledge or expertise and the departments they represent in relation to the topic. The topic may be further refined once the team is in place.

### Helpful hints:

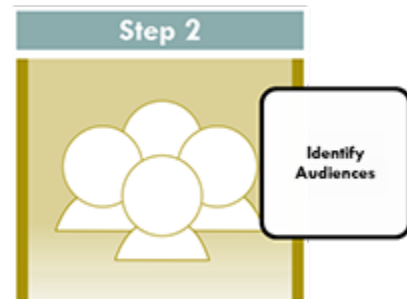
- Be sure the topic is specific and appropriate.
- Frame the topic in positive or neutral terms.
- Be sure that what you intend to do with the information gained is feasible.
- Frame the topic in terms that those you intend to engage with will understand — avoid government jargon.
- Ask yourself: Is the topic specific? Can your audience be expected to understand it?
- Be precise and selective about the team members or internal resources you include to avoid building a team that is unnecessarily large.

### Examples of drilling down topics and using positive terms:

- Focusing on what should be done to improve storefronts along a road section instead of focusing on how to improve storefronts along an entire road corridor.
- Improving communication and cooperation between law enforcement and a community instead of focusing on reducing crime within the community.
- Asking residents for input about one or two budget items versus seeking input about an entire spending plan.
- Asking seniors what programs and services they're looking for in a local park instead of seeking input from seniors for all parks.

## Step 2: Identify target audience(s) and the level of community engagement desired

Now that you have defined the topic and formed your engagement team, it's time to determine the target audiences and/or stakeholders, as well as what level of engagement you want to achieve. It's important to realize that some topics or issues require multiple audiences engaged at different levels.



### Helpful hints to identify target audiences:

- As a team, brainstorm all the groups that might possibly be involved or have interest in the topic and write their names on sticky notes.
- On a flip chart or wall, create two columns, “high” and “low.”
- Place each sticky note in one of the columns, considering each group or person’s level of influence (high or low) and/or level of interest.
- Select names from the “high” column and begin considering the best ways to communicate with each (more engagement can be expected from members with high levels of interest and/or influence pertaining to a topic).

### The International Association of Public Participation identifies five levels of engagement:

1. **Inform** — Provide the public with objective information to assist them in understanding problems, solutions or alternatives.
2. **Consult** — Work directly with the public to ensure their concerns and aspirations are consistently understood and considered.
3. **Involve** — Obtain feedback from the public on analyses of problems, solutions or alternatives.
4. **Collaborate** — Partner with the public in the development of alternatives, identification of the preferred solution and decision making.
5. **Empower** — Place decision making in the public’s hands.

Note that there is always a level of “informing” with any engagement initiative, while “empowering” is rare. For these reasons, your choice for each target audience will likely fall to one of the three middle levels. Each level of engagement requires varying amounts of work and commitment of time. While completing the accompanying engagement worksheet, ask yourself the following questions to help determine what level of engagement is needed:

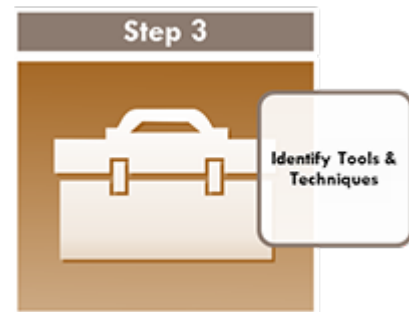
- What are the key decision points?
- What information do we need from the audience?
- What is the project’s timeline?
- What is the timeline for public involvement?
- How will the audience’s input be incorporated into the decision?

Example (from Step 1): Focus on what should be done to improve storefronts along a road section instead of focusing on how to revitalize an entire corridor.

<b>Target audiences</b>	<b>Engagement level</b>
Businesses	Level 3, involve
Surrounding residential areas	Level 2, consult
Business customers	Level 2, consult
Chamber of commerce	Level 3, involve

## Step 3: Identify tools and/or facilitation techniques

There are many communication tools and meeting facilitation techniques that are used effectively in the engagement process. The key is matching the right one with the right audience. Effectively engaging on a topic often involves multiple audiences, which means more than one method of communication is required for success. Step 3 outlines the engagement tools and facilitation techniques readily available within the organization, plus a few others that could be considered as beneficial. Users will want to refer to the decisions they made in previous steps to help determine what tools or techniques will work best.



### Tools/techniques:

- **Community meetings:** a network of churches, schools, community centers and other public places used for face-to-face meetings that typically feature a speaker(s) and time for those choosing to speak to do so one by one. This is a very common approach in local government that enables a lot of information to be delivered at one time, in one place. A challenge to this format, though, is that one or a handful of audience members can easily control the tone of the meeting and even encourage those with opposite views to not speak.
- **Community workshops:** similar to community meetings but much more personal, informal, flexible and less structured, enabling people to speak one-on-one with subject-matter experts or in small groups. This is an excellent method that ensures equal face time for all participants, preventing one person or a small group from commanding a discussion. It also generally enables more detailed discussions with individuals who have high interest in a topic than does a standard community meeting.
- **Focus groups or roundtable discussions:** facilitated discussions with small groups (typically 10 or fewer per group). This is a powerful way to collect ideas, opinions, experiences and beliefs about community issues. Focus groups also enable in-depth discussion, providing clarity about how different people view issues. Participants typically are selected, or are drawn to the discussion, for having knowledge about a topic or issue. It's best to have experienced facilitators manage the group discussions.
- **Electronic engagement tools:** provide the ability to set up temporary, custom accounts for targeted needs, such as seeking input on very specific questions. This is an area toward which the county is slowly trending. An example of one such tool is called Peak Democracy. Contact the IST Department for more information.
- **People:** fielding a group of employees or volunteers to administer surveys and/or pass out printed information, etc. Depending on the audience, relying on techniques some may deem as old fashioned can still be quite effective. Not only does it take the issue or topic to the audience in a very personal way, it also shows members of the target audience how significant or important you believe the issue to be.
- **Trained facilitators:** county employees who have special skills and training that enable them to facilitate meetings, workshops or group discussions. A trained facilitator can be the difference between keeping a discussion on topic and losing the audience's focus due to

tangents or unnecessary interruptions. Trained facilitators also are skilled at explaining complex issues in simple, understandable terms.

- **Social media:** Facebook, Twitter, etc., used for general-information purposes or set up with custom accounts for targeted needs. Strategically used, social media platforms can be very effective, however, despite their popularity they shouldn't be considered the only way to engage these days. No matter the platform used, it's important to know that your target audience likely already uses the platform or could be persuaded to. It's also important to realize that the day of the week and time of day information is distributed is critical to it being seen by the most number of people — after hours is typically best. Social media platforms, in general, are becoming much more visual than ever before, so photos and videos accompanying your messaging can be very effective. Social media also is a great way to link viewers to detailed information online. Chesterfield County manages several social media sites among departments that can easily share content to reach a broad audience. For guidance on using social media, contact the Department of Communications and Media at 748-1161.
- **Surveys:** applied at the right time and asking the right questions, surveys remain an excellent way to efficiently collect important information resulting in better understanding of a target audience's views on a topic. Chesterfield County uses Checkbox as its official tool to create professional, customizable surveys. It includes functions to run reports and share data among team members. For more information or assistance, contact the county's Learning and Performance Center at 717-6258.
- **Email marketing:** reaching an audience for which you have gathered email contact information. Examples include email listservs, e-newsletters, e-zines, etc. There are several in use by the county to communicate with various audiences. There also are opportunities to start new ones specific to an engagement need. The remaining challenge is collecting the contact information, which is why email marketing typically plays a role after establishing a connection with a target audience.
- **Websites:** developing content for the county's website, [chesterfield.gov](http://chesterfield.gov), or other associated sites and driving viewers there by using multiple tools. The county has the ability to create targeted websites in addition to posting information on [chesterfield.gov](http://chesterfield.gov). Either way, engagement projects benefit heavily by a robust Web presence to keep audiences informed. Communicators often use other platforms, such as social media, to drive audiences to online content.
- **Community events:** attaching your engagement campaign to county-sponsored events, the county fair or other community events. This can be particularly effective when targeting a very broad audience. Expect to provide event attendees something that showcases your topic. It could be as complex as a brochure or as simple as a business card — anything that may prompt them to tune in to your topic later. This is also a good opportunity to collect contact information from interested parties.

**A note about meetings:** A critical element when it comes to holding any meeting is selecting the right time and venue. Going to your audience, rather than expecting your audience to come to you, is a great way to generate more interest in a topic and shows that your team places value on engaging with the audience. Consider facilities that have some type of connection to your topic or target audience, and/or



where people regularly gather in their personal lives: a local library, health facility, local schools, or even a local business that has room for a meeting. Meetings hosted by local government don't necessarily need to be held in government facilities. Take your meeting to places where people already go. Also, consider when your target audience is most likely to be available.

**Make it a positive experience for participants:** No matter what tool or technique you select, or the venue, it's important to ensure that the audience's experience is a positive one. It's all about making people feel that they are not wasting their time by participating. Following are suggestions to create that positive experience while engaging face-to-face or online:

- Anticipate the audience's needs and prepare (language barriers, transportation).
- Use trained facilitators: They know how to remain objective, manage conflict and create environments where the participants feel heard.
- Greet people as they arrive, and thank them for their time as they leave.
- Prepare and hand out an agenda.
- Consider providing a takeaway piece — fact sheet, simple brochure, etc.
- Provide a way for people to indicate their level of satisfaction with the process — prepare a review sheet containing key questions.
- Inquire whether the audience would like to receive additional information, and collect contact information specifically for that purpose.
- Tell people about additional ways they may interact by providing phone numbers, email addresses, a Web address, social media site addresses, etc., and be responsive when they contact you.

## Step 4: Develop a communication outline

No matter the topic, target audience, engagement method, level of engagement sought or venue, your efforts will be hindered from the start if those you want to engage with don't know about it. From start to finish, having a communication outline or plan is vital to keeping any community engagement initiative on track. From reaching out to target audiences for the first time to demonstrating to your audience how input gained through the process was used in decision making, clear, accurate and objective information is critical throughout the process. Depending on the needs of the target audience, or audiences, multiple ways of communicating may be necessary — an email listserv may suffice for one group, while another may require printed correspondence or even phone calls. Though extremely valuable, don't expect electronic communication to meet all of your needs. It all depends on the audience.



Strong communication plans may include all or some of the following, depending on the need:

- A calendar outlining when things should occur
- Situation analysis summarizing the topic and need for communication
- A communication goal or goals briefly describing what your team wants to achieve
- Core themes, typically three to four, describing key concepts related to the topic
- List of target audiences, including internal and external audiences (internal audiences can help communicate with external ones)
- List of ways in which you intend to communicate with your audiences
- List of the content pieces needed (Web, print, key messages, presentation, video, etc.) and how they will be delivered
- A summary of how your team will evaluate communications effectiveness (monitor social media, track media placements)
- Broad key messages that can be modified as needed
- Objectives or milestones to achieve in the short- and long-term

### Helpful hints:

- Seek the assistance of the Department of Communications and Media. Staff can assist in developing your communications plan, including creating key messages and determining how best to reach your audience. For assistance, call 748-1161.
- Explore your audience's demographics, which will help identify language barriers, transportation needs and other challenges that must be overcome in order to communicate effectively with an audience.
- Consider what facilities are available for workshops or meetings, if needed. Remember, it's worthwhile to go to your audience rather than expecting the audience to come to you.

- Remember, a communication outline or plan should be fluid, able to be modified to meet needs and to leverage opportunities when they present themselves (set a schedule for evaluating you communication plan).

## Step 5: Maximize the engagement opportunity

You have your audience's attention. Have you considered opportunities to engage or inform that audience on other topics? This is not the time to develop another full engagement plan around another topic, because such a plan may need to involve other target audiences, but it could be beneficial to county decision makers to at least take the pulse of your audience on another topic that's closely related. Or, it could just be a great opportunity to inform your audience about related county services, programs or issues.



### Some examples:

**Additional information about services related to the topic:** If the main topic for engagement is the need for cycling and walking paths in an area, your audience may value learning about recreational or active-living opportunities currently available in the community.

**Additional information about an unrelated topic but could be of interest:** Informing and encouraging attendees to register for the Chesterfield Alert system could be introduced as a “did you know” and then provide information about how to register.

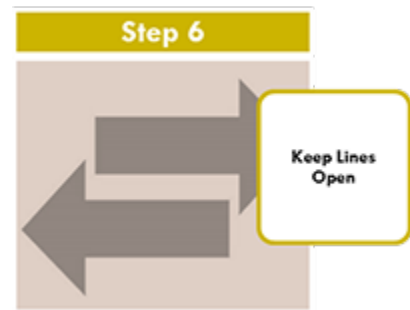
**Additional information that provides a broader view of the topic:** If the topic is controversial, provide a fact sheet with some additional information that puts the controversial topic into perspective. For example, if the topic is about increased neighborhood crime, you could provide some additional crime statistics that demonstrate that, compared to other places, county neighborhoods remain quite safe.

## Step 6: Maintain open lines of communication

To engage an audience on any topic is not easy and the more thoughtful you are in planning the more likely the experience will be positive, even if the topic is controversial. Be intentional by building this into your plan.

### Helpful hints:

- Let the audience know how they can continue to stay involved in the topic and be specific about how, when and where.
- Remind the participants how the information will be used.
- Thank everyone for their time and for being willing to participate.
- Share information about other upcoming events that may be of interest.
- If it is appropriate to evaluate the experience or ask for ideas for future engagement meetings, take the time to do that before leaving.
- If there was a promise to provide any information back to the participants, be sure this is done in a positive and timely manner.
- From the start of your engagement project, build and grow a network by collecting contact information from your audience (can be very valuable for future engagement opportunities on related topics).



## Step 7: Identify evaluation criteria

All the engagement in the world will not do any good if you don't know it's working. That's why it's so important to evaluate your engagement efforts through established short- and long-term criteria. The short-term criteria assist in identifying where adjustments to your efforts are needed along the way. Long-term criteria enable you to measure the overall results of your engagement efforts. The following evaluation criteria are suggestions. There likely will be a need for your team to amend or use different evaluation criteria based on the topic and specific needs.



### Examples of short-term criteria:

- Is the group staying intact during process?
- Is the group coming to consensus on a reasonable list of suggestions or projects?
- Is how the group is being contacted working (email, social media group, etc.)?
- Has the department or organization been able to incorporate and/or adapt to the group's suggestions during the process? If not, is there flexibility to adapt the engagement topic, if needed?
- Is data collected during the engagement process being shared with or reported to the audience?

### Examples of long-term criteria:

- Has the county prioritized the list of the suggestions or projects that came from the engagement effort?
- Has a report been generated and shared with the appropriate people to carry suggestions or projects forward?
- What has changed or been implemented?

**Example:** Focus on what should be done to improve storefronts along a section of eastern Hull Street Road instead of focusing on how to revitalize the entire corridor.

*Short term:* Are multiple business owners and area residents involved in the conversation? Are discussions moving beyond identifying problems to identifying potential solutions?

*Long term:* Has a list of projects to improve the storefronts been prioritized? Was a timeline for projects set? Has relationship between affected businesses and area residents improved? Are business owners, residents and perhaps chamber members continuing to meet or talk regularly?