

# Community Engagement Toolkit

## Engaging with Equity



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## **Overview**

This toolkit is designed to help organizations think through the steps needed to engage the community and/or recruit them to participate in your respective organization, coalition or taskforce.

For the purposes of this toolkit, “community” refers to intended beneficiaries and their families, friends, neighbors, and the leaders of small community-based or faith -based groups who work most closely with them in the place they live.

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## Phase 1: Before Starting a Community Engagement Effort

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### a. Assessing why Community Engagement is important to your organization

Before starting a community engagement effort, it is important to be clear about the purpose or goals of the engagement effort and the population(s) and/or communities you want to engage.

Answer the questions below to assess how your mission and vision are connected to the community.

#### Key Questions

**Who is impacted by your mission and vision? How is your mission and vision connected to the community?**

**Why is community engagement important to your initiative? How will it contribute to your results?**

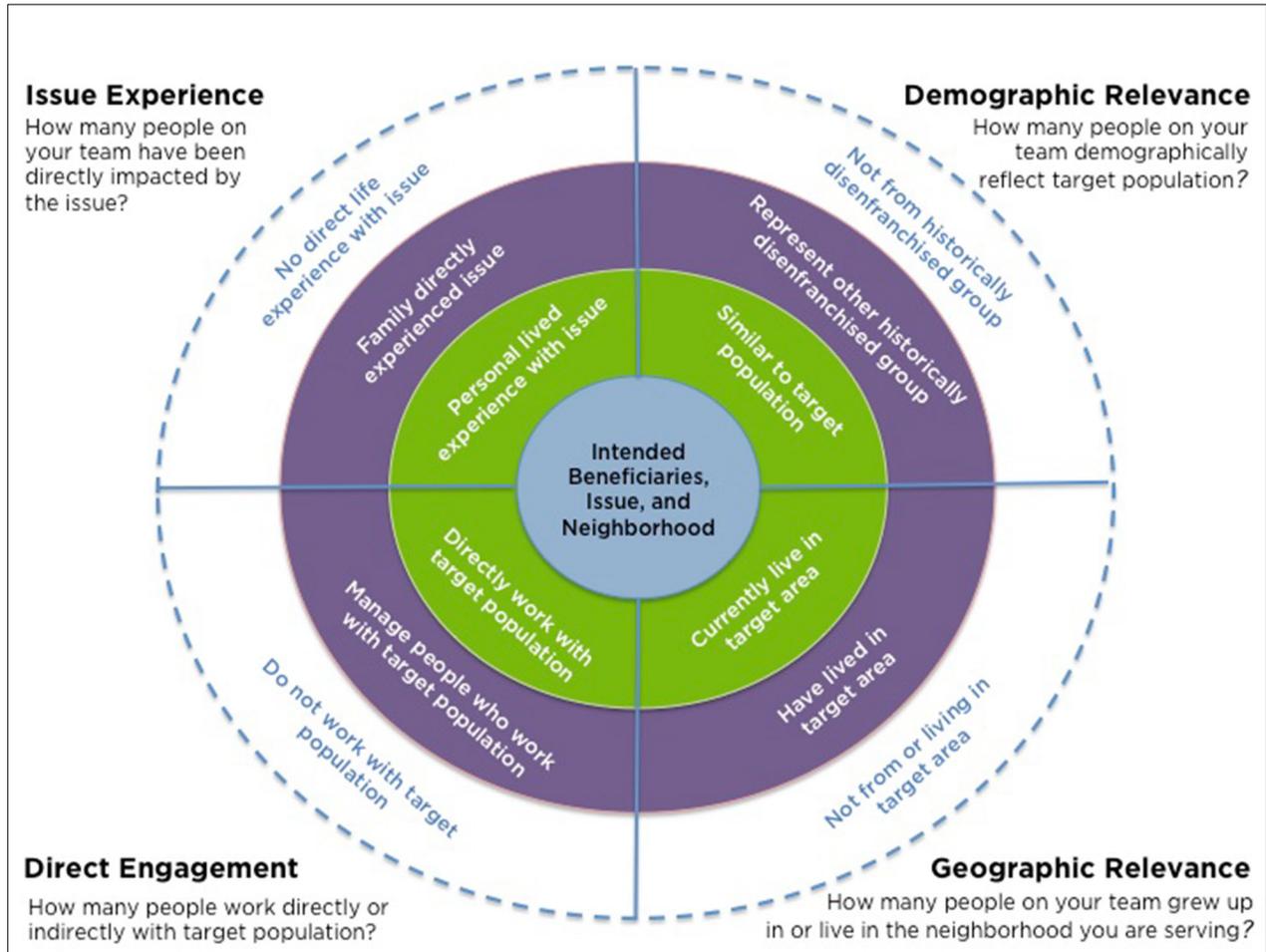
### b. Assessing who is at your table and benefits of participation

Before you assess who is at the table, it is important to review the difference between diversity, equity and inclusion. Review the definitions below and keep them in mind as walk through the next exercise.

<b>Diversity</b>	Engaging people with different backgrounds, beliefs, experiences, and recognizing the differences as assets to learning and innovation.
<b>Inclusion</b>	Authentic and empowered participation, a true sense of belonging.
<b>Equity</b>	Recognizing that everyone does not start at the same place, so some people will need different resources or support to achieve the same outcome. The goal is to eliminate disparities and level the playing field.

## Assess your tables

Understanding who's on your team or committee can help you identify what strengths and gaps you have in terms of experience and context expertise about the intended beneficiaries, issues, and neighborhoods you serve. Using the graphic below, identify where your core team, board, steering committee or coalition in general is on the map. If the majority are in the outer circle, you need to address equity at your table and your need for community engagement is more acute.



Source: Community Engagement Toolkit. The Collective Impact Forum & Leading Inside Out. Paul Schmitz. 2017.

Fill out the table based on where members are on the map.

	Direct Relevance	Secondary Relevance	Limited Relevance
Demographic Background			
Geographic Relevance			
Direct Engagement			
Issue Experience			

Using information from the chart, respond to the following questions.

### Key Questions

- Do you feel you have the right mix of actors currently involved to understand the population, issue, and neighborhoods you wish to help?
- Who is missing at the table? What's the cost of not having these voices? How would having these voices at the table help you work towards your mission and vision?
- List the top organizations or community members to learn more about that you can assess they would be a good fit to recruit and help advance your vision for the organization.

## Phase 2: For Engagement to Occur

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### a. Become knowledgeable about the community's assets, needs, and values

It is important to learn as much about the community as possible, through both qualitative and quantitative methods, and from as many sources as feasible. An understanding of how the community perceives the benefits and costs of participating will facilitate decision making and consensus building and will translate into improved program planning, design, policy development, organization, and advocacy.

There are many community-engagement techniques that can be used to (1) learn about the community's perceptions of the credibility of those initiating the process and (2) simultaneously lay the groundwork for meaningful and genuine partnerships.

Now that you have identified potential communities you are interested in recruiting, respond to the following questions to assess how much you know or need or learn about the community.

<b>Priority Audience 1</b>	
<b>Define the priority audience (be very specific)</b>	
<b>What are the assets and needs within this audience?</b>	
<b>Why should they care about our goals? What do they care most about? What are they most concerned about?</b>	
<b>Why might this organization or individual want to be involved? What stake do they have in the issue? How do they benefit from being involved?</b>	
<b>Why is the involvement of this organization or individual important to the success of the work?</b>	
<b>How can we support the engagement of this organization or individual?</b>	
<b>What role would you like this individual or organization to play?</b>	
<b>What resources will they bring to the table?</b>	

<b>Priority Audience 2</b>	
<b>Define the priority audience (be very specific)</b>	
<b>What are the assets and needs within this audience?</b>	
<b>Why should they care about our goals? What do they care most about? What are they most concerned about?</b>	
<b>Why might this organization or individual want to be involved? What stake do they have in the issue? How do they benefit from being involved?</b>	
<b>Why is the involvement of this organization or individual important to the success of the work?</b>	
<b>How can we support the engagement of this organization or individual?</b>	
<b>What role would you like this individual or organization to play?</b>	
<b>What resources will they bring to the table?</b>	

<b>Priority Audience 3</b>	
<b>Define the priority audience (be very specific)</b>	
<b>What are the assets and needs within this audience?</b>	
<b>Why should they care about our goals? What do they care most about? What are they most concerned about?</b>	
<b>Why might this organization or individual want to be involved? What stake do they have in the issue? How do they benefit from being involved?</b>	
<b>Why is the involvement of this organization or individual important to the success of the work?</b>	
<b>How can we support the engagement of this organization or individual?</b>	
<b>What role would you like this individual or organization to play?</b>	
<b>What resources will they bring to the table?</b>	

## b. Developing a recruitment and engagement plan

Now that you have taken the time to learn about the needs and values of the priority audiences, you may begin to develop a recruitment plan. Using the questions below, develop your next steps to recruit new members or organizations to your group.

### Key Questions

- Do you have access to people/groups that you want to recruit? If not, what organizations do? Where would these members be found?
- How have you engaged this group to date? How engaged are they? What do you want them to do?
- What relationship development will be needed to get that partner to the table? (upper management, health department involvement, staged outreach?) How can you forge relationships and become actively involved in efforts that are important to the people you want to recruit?
- What is best way to approach and engage them? Think about the potential barriers to recruiting these partner and what strategies can help overcome those barriers.
- Do you have a description of the roles and responsibilities of the individuals or organizations you would like to bring on board? Will their role be different than the general members?

## Phase 3: For Engagement to Succeed

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### a. What level of community participation are you currently operating at?

Now that you have developed an engagement plan, it is also critical to reflect upon at what level of community participation your coalition/organization/taskforce is currently operating at. This will help you consider ways to ensure meaningful participation for new members and to allow for greater clarity around their roles and responsibilities.

The chart below breaks down the continuum of community participation. In general, it is desirable to move progressively closer to the top of the diagram so that equity efforts become more community owned. This doesn't mean that "outside" organizations are eventually not involved, but that their involvement is defined by the needs and priorities of the community.

This diagram is not intended to suggest that there's only one way to structure a partnership; however, as a part of our commitment to promoting equity, increasing community participation and leadership are a critical part of promoting equity.

Review the chart on the next page and respond to the following questions.

- At what level is your organization/collation etc. currently operating in the community engagement spectrum? Is this the level you intended to work at?
- What policies or practices do you have in place to support community engagement at this level? What actions could you take to reach the next level (if that is your goal)?"

## Levels of Community Participation

	DEFINITION	COMMUNITY ROLE	OUTSIDER ROLE	EXAMPLES
<b>COLLECTIVE ACTION</b> <i>Greatest community control</i>	Self-Mobilization: community members act independently of outsiders. They have sole decision-making power and control resources, utilizing outsiders as they require.	Identify problems, set the agenda, and mobilize to carry out plans. They develop contacts with outsiders for resources and TA.	Serve in consultative and supportive roles.	Community members lead initiatives they create. They contact outsiders when they decide they need resources, support, or TA but have full decision-making authority.
<b>CO-LEARNING</b>	Community members and outsiders share knowledge and work together to form action plans with outside facilitation.	Co-create solutions with outsiders. Decision-making power is evenly dispersed.	Work as partners but facilitate overall process.	Community members have seats on governing committees with same influence and decision-making power is evenly dispersed.  Ex: Community members and outsiders seek funding jointly, as partners
<b>COLLABORATING</b>	Outsiders work with community members to identify issues and solutions.	Work with outsiders to identify problems and solutions. Input may influence decisions.	Ensure input and feedback are directly reflected in alternatives. Make major decisions and has final decision-making power.	Safe Routes to School Coalition (with no grassroots or resident representation) works with residents to identify issues and solutions regarding school-based transportation. Coalition has final decision-making power in developing action plan.
<b>CONSULTED</b>	Community member's opinions are sought; outsiders gather feedback and decide on course of action	Participate by providing non-binding feedback and answering questions. No decision-making power.	Controls process. Maintain decision-making power. Not required to incorporate community members' feedback	Focus groups, surveys, listening sessions, community meetings  A healthy housing coalition launched a survey to gauge what housing issues mattered most to residents to shape priorities.
<b>COOPERATING</b>	Tasks are assigned to community members with incentives; outsiders decide agenda, and direct process.	Complete tasks in exchange for incentives.	Make decisions without community input. Give tasks to community members.	Paying community members to spread the word (distribute flyers, social media, etc.) about a health fair.
<b>CO-OPTED</b> <i>Greatest outsider control</i>	Tokenism or manipulation; reps chosen and given a seat but have no real power/influence.	Join meetings, have title as representative	Directs process without community input	Checking the box

## b. Creating a space for meaningful participation

As you consider bringing on new members, it is important to identify ways to allow meaningful participation. Using the prompts below, assess what policies, practices or culture shifts may need to be adopted to support members.

### Key Questions

- What is your communication plan to keep members informed and up to date? Does it involve a mechanism to easily receive feedback?
- Are the hours of the meetings accessible to members who are not able to participate through their job or organization?
- What types of stipends and incentives are offered to facilitate participation (childcare, transportation, food etc.) especially when they may not have leave to participate or can participate as part of their job?
- How do you ensure that all members understand the terminology (e.g., acronyms) and concepts used in all communications?
- How do you ensure those that have Limited English Proficiency (LEP) have access to materials and able to participate during meetings in the language they most feel comfortable?
- Are you willing to facilitate participation for those who may be hearing or visually impaired?
- Given many meetings are now hosted virtually, how do you facilitate participation of those who may have limited access to the internet or a computer?
- How will you encourage contributions from community members to share their stories and knowledge?
- What type of orientation will you provide to new members and how will you check in with them to assess how their participation/engagement can be improved?

## References

Centers for Disease Control and Prevention and the Agency for Toxic Substances and Disease Registry (2015). *Principles of Community Engagement: Second Edition*.

Hauser, D. (2002). Community Participation Partnering with Youth. *Transitions*, 14(3).

Schmitz, P. (2017). *Community Engagement Toolkit*. The Collective Impact Forum & Leading Inside Out.