



COMMUNITY ENGAGEMENT ALMANAC

A tactical guide for supporting productive and equitable conversations with community-based stakeholders



The Community Engagement Almanac is a tactical guide for supporting productive and equitable conversations with community-based stakeholders.

Inspired by the Farmers' Almanac, this resource helps community-based organizations plan for the upcoming year of comprehensive engagement. The almanac presents best practices and ideas that respond to the constantly changing environment with COVID-19. **Use this almanac to proactively prepare to facilitate conversations across different formats while maximizing the health and safety of stakeholders.**

The Community Engagement Almanac provides effective tools to make engagement decisions equitably and helps you advocate for the value of community engagement even during crisis. The content and structure is conscientious of how the pandemic impacts people differently, requiring a shift in how we meet stakeholders where they are.

This almanac is not oriented to be read from start to finish. Instead, consider this a resource you can continue to reference as your work and the ways you reach stakeholders evolve.

We encourage you to pull the most necessary sections to meet your needs.

Upon research and direct experience of leading engagements during the pandemic, we've identified six major considerations for adapting community engagement to the post-COVID-19 context:

- **It is not as simple as just saying, "Let's do it virtually."** Facilitating a virtual engagement is not the same as facilitating in-person. This takes patience and practice to master, and you will build your capacity each time you host an engagement.
- **The digital divide is ever present.** Certain groups lack access to digital communication resulting from systemic oppression across race, social, and economic lines. The divide has been further exacerbated by the pandemic with stakeholders disconnected from engaging in community-based settings.
- **We all have different levels of comfort.** People may have varying levels of comfort and capacity to engage, especially as some are juggling many responsibilities. There are also varying levels of comfort with exposing others to one's personal space, e.g. home, that needs to be respectfully navigated.
- **Physical distancing can be an opportunity, not just a limitation.** Even with the lifting of social distancing mandates, there are opportunities for engagement to be conducted safely in person or virtually, to provide accommodations and accessibility to those who may not be ready to meet in person.
- **Equitable engagement requires intention.** Understanding the impact of the digital divide and the varying levels of comfort stakeholders have opened the opportunity to lead with an anti-oppression approach to planning and facilitating community engagement.
- **Honoring your stakeholders' trauma in times of crisis.** Some stakeholders may have experienced immense trauma resulting from the pandemic, and trauma is valid. The tools, assessments, and mini-guides across this almanac challenge you to reshape your intentions, approach, and agenda. This guide orients you to lead engagements by cultivating space to reflect and honor trauma.

INTRODUCTION I.1

HOW TO USE THIS TACTICAL GUIDE

We recommend utilizing sections most pertinent to your team's engagement needs. As community, context, programs, and services shift, your community engagement practices must also adapt. This almanac is intended for community engagement that is:

- Conducted today as we navigate "reopening," and as you shift your strategies to conduct community dialogue and build capacity in this changing context, and
- Conducted the years to come as virtual and phone engagements are supported by varying levels of in-person engagements.

The tools, assessments, catalog, and mini-guides allow for you to begin to adapt your community engagement strategies for 2022 and beyond.

PART II TOOLS AND ASSESSMENTS

Provides the process to plan community engagement with targeted stakeholders.

This section supports your approach, including choosing the right format for your stakeholders, uncovering your blindspots, and leveraging your resources for mutually beneficial engagement, all while ensuring your engagement is equitable, inclusive, and accessible.

[Pages 13 to 27](#)

PART III MINI-GUIDES

Presents best practices, resources, and checklists to support all aspects of the community engagement experience, as well as methods for promoting safety both in-person and remotely (virtually, digitally, or by phone/SMS).

The mini-guides are designed to be used independently as a way to build capacity and alignment or address a specific need, depending on the type of engagement.

[Pages 28 to 84](#)

PART IV CATALOG OF IDEAS

Presents a set of creative and effective ideas for leading engagements across alternative platforms, both in-person and remotely.

These ideas feature methods for conducting engagement across the full spectrum of participation- from outreach to shared leadership. This section offers ideas for different ways to set up productive, creative, and safe engagements.

[Pages 85 to 90](#)

IN THIS SECTION

[I.1 How to Use this Tactical Guide](#)

[I.2 Why Community Engagement Matters in Times of Crisis](#)

[I.3 What Does Community Engagement Look like?](#)

[I.4 Case Study: El Barrio Bikes](#)

Note that we have not published an exhaustive list of all the options for facilitating community engagement. Instead, our guide is more focused on the comprehensive ecosystem of planning and facilitating engagement, leading first with your intentions and approach, rather than proposing the digital tool that works best.

There are many other great toolkits and resources available that provide platform options that can also inspire you and be used in tandem with tools included in this almanac.

APPENDIX | Glossary, el Almanaque de participación comunitaria, and sources

[Pages 96 to 101](#)

All three parts can stand alone or work comprehensively together to provide the principles for why and how we conduct community engagement, introduce you to the platforms available today, and share best practices for ensuring successful engagement.

TIPS FOR APPLYING THE ALMANAC TO YOUR WORK

- **Start a conversation** with your team on community engagement priorities. Use the almanac to frame your discussion, find alignment, or build team capacity.
- **Be proactive, not reactive.** Prepare for shifting challenges in community engagement and competing priorities. Use this as a way to stay ahead of the pressure.
- **Advocate for why this work matters.** Use the advocacy tips ([see section to follow on page 5](#)) and information from other sections to improve your community engagement practice and ensure this work happens.
- **Collaboratively adopt the tools and assessments** into your practice. Build new work processes and best practices based on information offered in [Part II - Tools and Assessments](#). By using a set methodology for each engagement, you can more easily train team members and streamline workflow to boost collaboration.
- **Take inspiration or reference for strategies.** This is not an exhaustive manual for performing community engagement, instead [Part IV - Catalog of Ideas](#) is intended to inspire future engagements, build up your expertise and creativity, and, most importantly, foster stakeholder equity.
- **Use the checklists** in each of the [Part III - Mini-Guides](#) to track your process. The checklists can help you understand if something was missed or where you might need a stronger strategy.
- **Share with peers** across your network that use community engagement as a core planning and decision-making tool to help build knowledge and thought-leadership.



DESIGNED FOR ORGANIZATIONS ACROSS THE SOCIAL SECTOR

This almanac was originally oriented for the public sector, in response to a public health agency's pivot to adapt to COVID-19, while fulfilling the charge for sustaining community engagement outcomes. We led a collaborative needs assessment that identified a desire to adapt existing, in-person engagement strategies to the virtual/digital space. We built this almanac to not only address the needs now, but to capture best practices supporting their future facilitation.

All content is usable in any social sector organization looking to sustain their community engagement practices in an ever-changing public health climate.

INTRODUCTION I.2

WHY COMMUNITY ENGAGEMENT MATTERS IN TIMES OF CRISIS

Across the social sector, community engagement is a core operational component of many organizations. Policies, programs, and services are designed in direct response to community-based collaboration, insight, and data collection. In a post-pandemic environment, challenges remain to reach vulnerable stakeholders. While social distancing is no longer a mandate, community members experience a variety of comfort levels when it comes to "re-entry." This can limit the capacity for sustaining relationships and trust that have been built within the community over time.

The pandemic exacerbated systemic inequities that have impacted stakeholders across racial, social, and economic lines, as local government struggled to meet community priorities. Although many stakeholders have been traditionally left out of decision-making, engagement is particularly important during times of crisis, as decision-making becomes more urgent and more impactful.

With all of this, many who work across the sector are asking, "Is this the right time to conduct engagement?" With the ongoing effects of the pandemic on the local economy and public health and safety, many have set community engagement as a lower priority item. As postponing or canceling engagements is detrimental to the promotion of community equity, we believe the question should be reframed, "How can we apply what we've learned from Covid-19 to conduct safe and equitable engagement as we emerge from the pandemic?"

Community engagement at this moment presents an opportunity to build relationships and community trust differently, and even perhaps more authentically- as long as it is led with transparency, access, and inclusion.

TALKING POINTS FOR ADVOCACY

Community engagement is hard work that takes time and resources from both the organizer and stakeholders. At times, organizations or staff might receive push-back against conducting engagement, and you can anticipate that there will be more in a post-pandemic world. The following talking points can support you in advocating for community engagement:

ISSUE STATEMENTS	TALKING POINTS Addressing the concerns of community engagement today
Community engagement is not a priority at this moment. We need to focus on basic needs-not relationship building.	<ul style="list-style-type: none">• Decisions are still being made that affect our target stakeholder group. These decisions may be damaging, if we do not bring them to the table. We need to understand how the target stakeholder group is experiencing the current moment in order to better serve them.• Engagement can help improve our effectiveness and efficiency of our programs that serve basic needs. It allows us to meet their needs head on.• As many of our programs, services, systems, or processes have pivoted, engagement gives us the opportunity to gain insights to reflect on which still need to shift to better meet basic needs.

ISSUE STATEMENTS	TALKING POINTS Addressing the concerns of community engagement today
We do not have time for this, our current timeline is too short.	<ul style="list-style-type: none"> • We must be proactive, not reactive in our work, and engagement helps us improve our chances for long-term impact, even beyond our project timeline. • It is important to build it into our timeline as it informs what our intentions and approach should be. By incorporating engagement, we can ensure any decisions and outcomes outlined in our timeline are in alignment with stakeholder needs. • The pandemic has presented a new opportunity to leverage our networks and partnerships differently, and engagement can support the development of a shared leadership strategy to impact our project beyond our timeline.
We have limited resources and capacity.	<ul style="list-style-type: none"> • We do acknowledge that planning an engagement will take time and effort. However, our project will lack legitimacy without the insights of stakeholders. • By investing in our resources and capacity by engaging with stakeholders on the project now, it will allow us to avoid barriers and misunderstandings later. Additionally, it will build support and buy-in. • We have the opportunity to engage stakeholders differently through virtual and digital platforms that are proven effective and cost saving. It allows us to meet stakeholders where they are, so they can engage in ways that fit their lifestyles.
We are not going to reach the same number of stakeholders as we would have before the pandemic hit.	<ul style="list-style-type: none"> • The way we previously reached people has changed, and this is a moment for us to be innovative and find better ways to reach the community in the future. • This moment presents us with an opportunity to rethink how we evaluate community, and begin to go beyond numbers, in regards to how we reach and engage with stakeholders.
BENEFITS OF ENGAGEMENT	TALKING POINTS Advocating for community engagement today
Community engagement can be beneficial in keeping our community healthy and building a more just society.	<ul style="list-style-type: none"> • COVID-19 has exacerbated social isolation, which is a public health issue. Engagement combats isolation, as it is a stress reliever and builds a strong social infrastructure to help us address the crisis. • The pandemic does not impact all communities equally. Black, Brown, and immigrant communities have been disproportionately affected. Engagement will help us serve our stakeholders more equitably, by providing different access points to engage, whether in-person, digitally, etc.
Engagement helps our organization stay relevant, transparent, and effective during and after a crisis. It can help us retain and build trust among stakeholders.	<ul style="list-style-type: none"> • Ineffective decision-making is a result of not having the right people at the table, and the pandemic has left certain stakeholder groups out of the decision-making process. We need a collaborative approach with different demographics to make more impactful decisions. It also helps us to begin to build trust and ultimately sustain our long-term relationships with these stakeholders. • Community engagement allows for our team to advocate across the rest of the organization, and our larger network, on the policies and actions that impact the stakeholders we co-design with. • Decision-making is happening around us, and engagement can inform us, improve transparency, and combat misinformation as we shift out of crisis-mode. It also holds us accountable to our stakeholders to ensure they are a part of decision-making on an ongoing basis.
Leading engagement through a crisis has made our team stronger and better equipped to have a broader reach.	<ul style="list-style-type: none"> • As platforms for engagement became more versatile and accessible during the pandemic, we have new capabilities to reach more stakeholders through alternative methods to strengthen our reach.

WHAT DOES COMMUNITY ENGAGEMENT LOOK LIKE?

Community engagement can range from simply informing the public about plans for a project to participating in more on-going practices, such as getting feedback from various groups and empowering key stakeholders in a final decision-making process.

It exists along a spectrum of deepening participation by stakeholders. Depending on your goals and intentions, stakeholders will engage across varying levels of participation. The spectrum of engagement is divided into four categories: being informed through Outreach, being engaged through Consultation or Collaboration, or being empowered through Shared Leadership.

Throughout the almanac, we will reference this spectrum, to support you in making decisions and planning according to the level of participation by your stakeholders.

OUTREACH



Engagement with the purpose of informing and **building awareness of stakeholders**. Generally this interaction is one-directional with information flowing from your organization to stakeholders, with little space for collaboration.

Dissemination of information can support community relationship-building or be supplemental to your entire engagement process, as this is often the first step in larger engagement initiatives- mobilizing stakeholders to first understand the situation, so they can later become more involved.

Common methods for **Outreach** can include:

- information distribution through mail, email and phone campaigns
- social media and digital campaigns
- tabling or canvassing
- public presentations
- media campaigns through press releases and interviews

PROS

- Engages a large number and diversity of stakeholders
- Less stakeholder time
- Can be a singular engagement/activity
- Less planning time and capacity for organizing team

CONS

- Low stakeholder participation
- Limited stakeholder influence

CONSULTATION



Engagement with the purpose of **gathering insights** and feedback from stakeholders. Generally in this bi-directional interaction, information is presented to stakeholders, who are then asked to give specific feedback or input.

Stakeholder input is typically incorporated into the decision-making process to ensure community voices have influence. Input can support conducting need assessments, prioritizing decisions, or reframing initiatives.

Common methods for **Consultation** can include:

- insight solicitation through surveys, questionnaires and polling
- information gathering through interviews, focus groups and facilitated discussions

PROS

- Medium amount of stakeholder participation
- Engages a large amount and diversity of stakeholders
- Can be a singular engagement/activity
- Medium amount of planning time and capacity for organizing team

CONS

- Some stakeholder influence
- Less stakeholder time

COLLABORATION



Engagement with the purpose of **involving stakeholders in a co-design process** of idea generation and decision-making. Generally these bi-directional interactions mobilize stakeholders to support community buy-in of your initiative and build trust and long-term partnerships.

Common methods for **Collaboration** can include:

- focus groups, round-table discussions, and facilitated workshops
- implementation support of an initiative
- partnership development to support an initiative

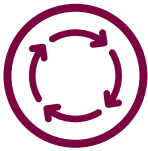
PROS

- High stakeholder participation
- Medium to high stakeholder influence
- Can be a singular engagement/activity but is best as a longer process

CONS

- Engage a smaller amount of stakeholders
- More stakeholder time
- More planning time and capacity for organizing team

SHARED LEADERSHIP



Engagement with the purpose of **distributing ownership of a process or project** that includes some form of participatory decision-making with stakeholders. Generally this bi-directional process takes time to build, but in doing so all stakeholders take collective responsibility and ownership of the outcomes.

Shared control and accountability of an initiative builds lasting partnerships and transparency. These engagements benefit from leveraging a diversity of impactful voices in developing solutions. The facilitator's role in shared leadership is to support stakeholders with tools and resources that enact change.

Common methods for **Shared Leadership** can include:

- partnership development and coalition building for specific initiatives
- providing administrative and technical support to community led initiatives
- micro-grants for community projects
- providing a framework for community impact.

PROS

- High stakeholder participation
- High stakeholder influence
- Must be an engagement process, not a singular event

CONS

- Engage a small amount of stakeholders
- More stakeholder time
- More planning time and capacity for organizing team

CASE STUDY: EL BARRIO BIKES



WHAT IS EL BARRIO BIKES?

El Barrio Bikes is a mission-driven, community collaborative in East Harlem, New York City with the aim of promoting inclusivity and eliminating barriers to biking within the community. Through events, programming, and advocacy, they work to build local confidence and enthusiasm around biking. El Barrio Bikes was formed in 2016 in collaboration with The New York City Department of Health and Mental Hygiene's (NYC Health Department) Bureau of Harlem Neighborhood Health (Harlem Bureau) and their community partners, as a multi-sector collaborative that employs a place-based approach to advance health equity. El Barrio Bikes was born from the diverse resources and goals of organizations already working in the community, as well as similar groups in NYC.

El Barrio Bikes evolved from a simple open community meeting of city agencies, biking advocates, local community-based organizations, and bike share operators to discuss barriers to biking in East Harlem into a thriving community-based collaborative directly addressing those barriers. This evolution was shepherded by the NYC Health Department's commitment to community engagement and dedication to health equity. This collaborative employs many activities and initiatives across the spectrum of community engagement (as described on [pages 7 and 8](#) of this almanac).

El Barrio Bikes utilizes the [Spectrum of Engagement](#) strategically with each initiative supported or framed by insights from other engagements on the spectrum:



Outreach to promote inclusivity in biking in East Harlem



Consultation in understanding barriers to biking



Collaboration in building community-driven biking initiatives



Shared Leadership through consensus decision-making



El Barrio Bikes operates as a collaborative of partners and volunteers committed to the shared mission and enacting impactful initiatives. New and existing partners participate in open-invitation monthly meetings to select and develop activities to support the overarching mission. Voluntary subcommittees operationalize selected projects, develop initiatives, and regularly report back to the full group.

While their mission is bike-advocacy focused, their stakeholders are a much larger group than those interested in biking. El Barrio Bikes considers all of East Harlem and the neighboring communities to be their stakeholders, including the individual and the neighborhood itself. Their work is impactful through supportive partnerships with government agencies, local nonprofits and organizations, small businesses, and street fairs.



Demonstrating Outreach

Outreach is a key tool for El Barrio Bikes to promote inclusivity and eliminate barriers to biking in East Harlem. Outreach is engagement with the purpose of informing and building the awareness of stakeholders. They take a hyper-local approach to sharing resources and information with their stakeholders, utilizing in-person events or initiatives coupled with strategic social media campaigns. The following are a few examples of how El Barrio Bikes uses outreach events to build community awareness of local issues:

- El Barrio Bikes hosts events like “Bike Bashes,” where residents are provided with free biking lessons, helmets, and other resources. This is an opportunity to build awareness in the community on biking issues and speak directly with stakeholders.
- They are one of the sponsors of “Party on Park,” an annual street festival in East Harlem. More than 10,000 people are engaged through these large community events.

Throughout all outreach efforts, El Barrio Bikes maintains a community leadership role and acts as a trusted source of biking information by maintaining a community biking calendar, increasing bike share opportunities, and participating in discount programs.



Demonstrating Consultation

Consultation is another key tool to help address barriers to biking by promoting community health through the improvement of local access to transportation and engaging public spaces to collect community input. Consultation is engagement with the purpose of gathering insights and feedback from stakeholders. As an example, stakeholders expressed resistance to biking, citing the community’s exclusion from earlier bike infrastructure planning processes, the lack of autonomy to make environmental and policy decisions in their neighborhood, and the perceived contribution of biking to gentrification.



The consultation engagement approach is a crucial type of community engagement that El Barrio Bikes has used throughout the years, especially as part of its inception. To better understand perceptions, concerns, assets, and barriers to biking in East Harlem, and before the formation of El Barrio Bikes, the NYC Department of Health carried out one-on-one conversations with 30 stakeholders. Key to success in these conversations was the Health Department's acknowledgment that resistance was justified by a long history of disinvestment. These conversations established the initial direction for biking advocacy by revealing partner priorities, including communities in planning processes, increasing information and education, and introducing community-led programming.

The facilitation of surveys, as well as event monitoring and evaluation, is another consultation tool employed by El Barrio Bikes. Members regularly track participation and community engagement through surveys and observations. Facilitating consultation has delivered the following outcomes for El Barrio Bikes:

- Bike storage as a potential policy and advocacy priority
- Increased bike share membership and participation in discount programs
- Local bike rack installations
- El Barrio Bikes's attendance at local community board meetings

Results are shared at member meetings, bolstering strategy for future activities and initiatives.

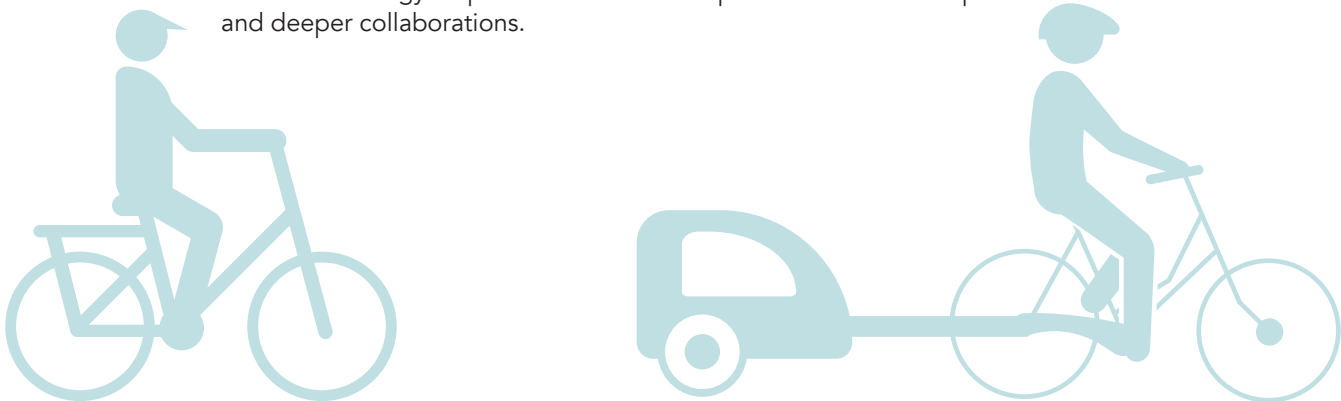


Demonstrating Collaboration

Community engagement in the form of collaboration is one of El Barrio Bikes's strongest methods for promoting inclusivity and breaking down barriers to biking. Collaboration is engagement with the purpose of involving stakeholders in a co-design process of idea generation and decision-making. Led by a [Black-owned business consultant](#), El Barrio Bikes hosts free training for potential group ride leaders. The training itself acts as an opportunity to meet others and collaborate - designed specifically to build both biking and leadership skills among residents and people of color. After participants are trained on how to safely ride a bike, they are expected to lead community rides. Participants are encouraged to lead rides with their own perspective and flair, producing truly community-led events and providing more accessible opportunities to bike safely with other people, especially residents and people of color. Ride leaders created partnerships and ride themes that were fun and meaningful to them, like the History and Ice Cream ride. This methodology helps ride leaders develop a sense of ownership and deeper collaborations.

VIRTUAL EVENTS

While movement was restricted in New York City in 2020 due to the COVID-19 pandemic, El Barrio Bikes's ride leaders pivoted to host virtual bike rides in English and Spanish. Ride leaders sought to address the lack of Spanish-led biking initiatives. They hope to expand on their Spanish-led programming in future initiatives.





Demonstrating Shared Leadership

While the formation of El Barrio Bikes has been an exercise in community collaboration, the collaborative has developed into a model of shared leadership. Shared leadership is engagement with the purpose of sharing ownership of the project and final decision-making with stakeholders. The individuals on the leadership team at El Barrio Bikes are contracted with the NYC Department of Health and compensated for their labor, transforming a small subcommittee into a community builder. Relationship-building is critical to their work, leveraging community connections to better enact their mission. El Barrio Bikes hosts quarterly group meetings to provide open opportunities for neighborhood residents, advocates, and local organization staff to interact with programmatic and systems-level decision-makers.

All members of the organization, contracted and volunteers, are stakeholders in the East Harlem biking community, coming together to promote inclusivity through biking. Leadership meetings include structured decision-making time during which the group discusses collaborative plans and activities together. Members of the team are able to leverage their own personal interests and core values into El Barrio Bikes's initiatives, further developing relationships with partners and deepening their commitment to the mission. Importantly, members of El Barrio Bikes are demographically representative of their community. Key to promoting inclusivity is ensuring members of the community see people who look like them biking and leading community-driven initiatives.

El Barrio Bikes's commitment to collaborative-leading and playing a larger role in the NYC biking community is a core component of their work. They host regular group meetings, bringing together members of their organization and members of the greater East Harlem biking community to address barriers. By hosting these meetings and attending others, they are able to support changes with a greater impact. Connecting to their advocacy work, El Barrio Bikes utilizes group meetings to listen, share, and, eventually, address challenges related to health equity and biking.

El Barrio Bikes succeeds in community engagement throughout the spectrum of engagement by putting in the effort to listen to and work directly with their community. Activities in each engagement category build off of one another, ensuring a productive and informative feedback loop. As El Barrio Bikes prepares for the future, they look to their community for what needs to be addressed first. Their focus in 2021 and 2022 is one of recovery and advocacy: recovery for small businesses that need economic support after a challenging two years and advocacy for biking inclusivity as more individuals are able to experience slow streets and gain access to parks. El Barrio Bikes will continue to utilize the spectrum of engagement to inform and guide their work.



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