

MINI-GUIDE FOR

PLANNING ENGAGEMENTS



1.1 IDENTIFYING YOUR ENGAGEMENT'S PURPOSE

Before planning the specifics of your event, it is important to clarify your goals and frame your expectations. As with in-person engagements, virtual and phone engagements require significant planning time to determine purpose and appropriate methods to be successful. The three essential aspects of any engagement that must be determined to ensure success are:

Goals are broad ideas about what you hope to achieve through the engagement. These goals should be both tangible (measurable) and intangible. Tangible goals are measurable, while intangible goals might be a bit difficult to evaluate immediately, such as improved collaboration with your team, strengthened communication across a community, the creation of a safe space for individuals to share feedback, or shifted understanding or attitudes.

Outputs are specific and tangible information or artifacts that you will take away from the engagement. They might include insights and anecdotes from stakeholders that you will gather, an implementation plan, project concepts to pursue, etc.

Evaluation is a powerful tool for understanding your engagement and can support your ability to increase internal and external capacity, influence policy, and secure funding. There is no singular approach to evaluation, but it is important to consider it from the outset of your engagement planning to ensure alignment with the project's purpose. Check out the [Mini-Guide for Engagement Evaluation](#) to support your development of an evaluation framework.

Understanding of the needs of stakeholders can circumvent challenges and lead to a successful experience. Once you have identified your stakeholders, take some time to consider the motivations and concerns they have in regards to the engagement. Engagements are substantial time commitments for both the facilitator and stakeholders, so it benefits everyone to use meeting time wisely. Understanding stakeholders in a deeper way can support you in:

- Developing appropriate activities based on the stakeholders' familiarity with one another, as well as their areas of expertise, attention spans, and comfort levels with the process
- Finding ways that you can reciprocate the value you gain from stakeholders' involvement to garner support and improve participation
- Anticipating challenges by being cognizant of personal (or organizational) agendas and addressing these challenges head-on by allowing stakeholders to vent before moving into the workshop itself.
- Understanding the key socio-historical and cultural contexts that may impact the perceptions and participation of stakeholders, in order to support challenges or sensitive subjects
- Developing the appropriate technological support based on the technology platform being used or comfort levels of stakeholders

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TOOLS AND TEMPLATES

You can use [Purpose and Planning Tool](#) to help clarify the purpose of a community engagement event for a plan no matter if it is in-person, over the phone, or virtual.

1.2 BUILDING AN AGENDA

Building on the purpose you have already defined, plan the flow of the experience and specific activities that will set the stage for the group to achieve the outcomes you have defined in an inclusive and respectful way. If you started with your engagement type and have not articulated your purpose, we recommend that you use the [Purpose and Planning Tool](#) to ensure it matches your capacity, stakeholders' comfort levels, and the goals of the engagement.

An agenda should take into account ways to create an experience where everyone gets a chance to speak, and stakeholders are encouraged to listen with attention. For every engagement type, no matter if in-person, over the phone, or virtually, it is important to build an agenda that is sharable to your facilitating team (if appropriate). For each agenda, make sure to:

- **Build in time at the beginning of your agenda** to share your purpose with the stakeholders--clarifying goals and next steps. Often, a portion of the opening will be spent bringing everyone up to speed through a presentation or discussion.
- Similarly, **make time at the end of your agenda for closing and a discussion of next steps.** Explain how stakeholders' contributions will be used moving forward. Focus on how and where information will be shared, how it supports a larger process, and what happens next, especially if you are holding another event. Make sure to end by providing stakeholders with a unified sense of completion.
- **Incorporate flexibility** into your agenda. If your engagement is scheduled for more than two hours, build in extra time for a break. Should you need a moment to reset the tone, use your break to regroup and refocus the experience.
- **Do not forget to plan how you will set the tone.** No matter the format, remember to plan in time to appropriately set expectations, build and review a set of group rules for the experience, and allow time to address questions, if needed.
- **Add in all the details.** Make sure for each part of your agenda you articulate the goals of the topic or activity, needed materials, steps, prompt questions, role of team members, potential issues, and, if appropriate, how you will collect the insights.
- **Identify opportunities for evaluation.** Identify how monitoring, tracking, and impact evaluation might fit into your engagement. It could be as simple as taking attendance or providing a survey.

When planning, do not forget to address working safely in-person. In order to reduce risk to participants and the organizing team, we must change how we interact when facilitating an in-person engagement. This involves assessing the safety of the planned engagement and how you are preventing and mitigating risks for the participants. Make sure that you adopt physical distancing measures, and promote the use of masking, to accommodate the comfort and safety of all stakeholders. Review the [Mini-Guide for Physically Distant Engagement](#) for further information.

DETERMINING YOUR TECHNOLOGY PLATFORMS

- Gauge stakeholders' ability to participate before creating your agenda.
- Determine stakeholders' accessibility to a WiFi connection or if they require hotspots.
- Smartphone mobile technology is often more prevalent than laptops or desktop computers for many.

TIP: Reach out to the community with an easy, short survey to determine access and technology capabilities.

Review the [Mini-Guide for Virtual Engagement](#) to think through how to choose a platform and their pros and cons.



OPEN ENGAGEMENT EARLY TO SUPPORT ALL

When planning a virtual engagement, plan to open your engagement 15 to 30 minutes before formally starting the engagement. Encourage stakeholders who might have technology needs to join beforehand for individual support and review of the platform features.

For other key considerations of planning virtual engagement, review the [Mini-Guide for Virtual Engagement](#).

1.3 PLANNING A SAFE, INCLUSIVE, AND PRODUCTIVE ENVIRONMENT

As you begin to plan the specifics of the engagement, do not forget to consider the limitations and opportunities unique to your capacity, community, and context. Building a deeper understanding of your available resources will support your planning by clarifying your human capacity—including strengths to leverage and areas that might require additional attention or consideration.

Make accommodation requesting easy

Ensure stakeholders know how to make accommodation requests before your event. You can include an email or phone number they can reach out to for their request on any communication materials. Stakeholders will know best how to meet their own needs, so give them the opportunity to let you know.

Center marginalized voices throughout your planning process

Everyone has a role in ensuring that equity, access, and inclusion are a reality:

- Recognize the privilege of people on your team.
- Recognize that civic engagement is highly correlated with income and formal education, whether the setting is in-person or virtual.
- Recognize some will have limited access to technology needed to participate virtually. Consider data usage when developing phone applications and design them to be data-lite.
- Understand the level of trust within the stakeholder group.
- Understand the level of comfort engaging online.
- Clearly define your engagement approach and communicate roles.
- Take the time to invest in relationship-building.

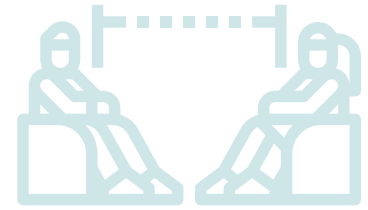
To ensure your engagement is inclusive and rooted in equity, review the [Mini-Guide for Anti-Oppression, Inclusion, and Accessibility](#).

Be thoughtful about scheduling

There is no perfect time of day, but certain times may be better than others for your target stakeholders. Think when they may have a natural break in the day or where they might be able to travel easily and safely. If a goal is to gather a varied perspective, consider hosting two events on different days to capture a wider audience. Also consider how you can join forces or combine with an existing event. It is better to have access to your desired group for even an hour than planning a three-hour event with no attendees!

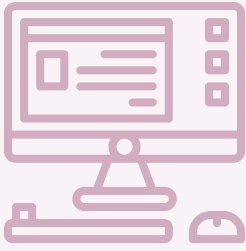
Reach out respectfully and inclusively

Give people plenty of notice. Use the outreach channel that suits your network and capacity. Choose media that matches your strengths, while being appropriate and accessible to your stakeholders. This may mean putting up posters in shop windows or laundromats, or contacting participants through an existing listserv.



SETTING UP YOUR ACCESSIBLE, IN-PERSON ENGAGEMENT

- For in-person engagement there are considerations needed for a safe, accessible, and inclusive space.
- Consider laying out your space to accommodate 6-feet of physical distancing.
- Allow enough room between rows of seats for easy navigation, sitting, and standing. Ensure that aisles are wide enough for wheelchair access.
- If a standing-only event, have chairs available for stakeholders who cannot stand for any length of time.
- Ensure space for stakeholders using wheelchairs and include chairs for companions to be seated with them.
- Allow clear aisles around the seating area; patrons with low vision may wish to orient themselves along the outer walls of a room.
- Consider the height of displays and wheelchair accessibility.
- Tape down or remove any loose cables or wires so that they do not become a tripping hazard.
- Use microphones to ensure good audibility of speakers, even when it doesn't seem necessary.
- Set-up assistive listening devices, if they are available.



ENSURING YOUR PRESENTATIONS ARE ACCESSIBLE

For webinars or in-person presentation:

- If using a Powerpoint or handout with pictures, include a descriptive caption with images or briefly describe any images of charts on each slide.
- Make audio visual presentations captioned, or have transcripts available.
- If audio is used, include captioning or transcription, such as [Otter](#).
- Consider possibilities for audio description for video or film presentations. Note: you can add your own audio description using [youdescribe](#).
- Find out how to make ASL interpreters or CART service available.

If possible, by request, provide handouts and presentation materials in large print and other languages. For large print materials, use at least 18 point font and a clear, non-serif, aligned font such as Arial, with 1.5 spacing between lines. Provide contrast, as requested (e.g. black text on white background, white text on black background, or other color combination).

1.4 PLANNING FOR PARTICIPATORY DECISION-MAKING IN YOUR ENGAGEMENT

(VIRTUAL AND PHYSICALLY DISTANT ENGAGEMENT)

As productive dialogue supports the creation of a space to prioritize ideas, participatory decision-making provides the space for narrowing those ideas further. It creates a democratic pathway towards choosing the most effective option that works for everyone in the group. It is important to clearly determine your participatory decision-making process to best include all voices without creating unanimous agreement.

Finding the best participatory decision-making approach

The approach to decision making is significantly impacted by the format of your engagement. In-person engagements include more creative options for engaging stakeholders and creating productive dialogues around the decisions. To select your approach, review the list of activities provided in the [Mini-Guides for Virtual Engagement](#), [Phone/SMS Engagement](#), and [Physically Distant Engagement](#).

No matter the approach, take into account the following:

How to define consensus

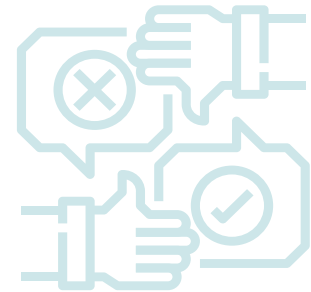
Consensus is reached when a decision is deemed acceptable by everyone in the group. Acceptance is key in consensus as it is not the same as agreement. A decision can enjoy consensus and move forward in a group even if not everyone personally agrees with all the details of the decision or sees the decision as their first choice. For consensus to work, stakeholders prioritize decisions that work well enough for the whole group above decisions that must work perfectly for oneself.

Silence is not agreement

When asking for agreement, it might be tempting to accept silence as a response. However, it is important to facilitate conversation to allow stakeholders to voice their position, whether they agree or disagree.

Limitations with 'yes' and 'no'

While yes and no may be used to voice agreement or disagreement, it is important to give all stakeholders space to voice their opinion. Those who vote yes may have some reservations that should be taken into account, and those who vote no may simply want to learn or discuss more before agreeing.



1.5 UTILIZING ARTS AND CULTURE IN ENGAGEMENT

Arts and culture is an integral part of a community, and everyone can bring their culture to benefit community dialogue. Arts and culture presents an incredible framework for promoting inclusive engagements where stakeholders feel welcomed, included, and can bring their whole selves to the engagement. Additionally, it can also help to cultivate a creative space that is easier, fun, and effective in what you are trying to achieve. Arts and culture can be facilitated in-person, over the phone, and virtually.

THE BENEFITS OF ARTS AND CULTURE

The incorporation of arts and culture allows for dynamic possibilities for sharing and belonging, further supporting the process for community engagement, and outcomes that support long-term community building.

Increases attendance

Use it not only as an engagement tool, but also a promotional tool. By partnering with local arts, musicians, and storytellers, this could lead you to a new set of stakeholders and can help expand your reach to those who typically would not attend otherwise. Additionally, this can be a positive way to start the engagement before diving into dialogue.

Introduce an engagement or organize **virtual performances** throughout your agenda by a local community member who is participating.

Sets the tone

From the on start an engagement is only as successful as how it has introduced and welcomed all stakeholders to the engagement, allowing them to feel comfortable to bring their whole selves to the experience and process.

Lead with **icebreakers** like scavenger hunt that allows for stakeholders to bring an item that resonates with their cultural identity or expression to present to the group.

Finds commonalities

It helps build connections across different cultural groups participating in an engagement. Stakeholders can learn through dialogue and activity about the artistic practices of others, as well as their cultural heritages, identities, and expressions. Thus, participants find commonalities they have with others through artistic and cultural practice and expression.

- Build a **collaborative community tree** using art supplies for collaging mapping commonalities.
- Invite a **local chef** to cook a shared recipe and support leading a discussion with attendees.

Increases participation

It offers new ways for stakeholders to be involved in framing questions and problems together, rather than “inserting” their thoughts into an existing dialogue or responding to pre-determined questions. Make a process fun and attract stakeholders to a project.

- Including **virtual performances** can generate memorable experiences that are deeply responsive to people and place, offering more meaningful avenues for participation and the opportunity to generate more adaptive approaches.
- Use a think analog that asks stakeholders to **create, draw, build...** and then shares their results over the video platform.



DEFINING ARTS AND CULTURE IN A COMMUNITY-BASED CONTEXT

Arts is the practice of artistic expression through visual mediums (drawing, sculpture, muralism, photography, design, etc.) and performative mediums (theater, music, dance, storytelling, poetry, etc.) that leverages engagement in cultural, social, and economic development. Culture is the cultural identity and expression of a stakeholder group and that benefits community building and sustainability.

Bolsters relationship building and mutual respect

As stakeholders can come to the engagement as their whole selves, they are also building relationships and respect with one another. This helps to make for a more inclusive dialogue in the moment, and bolsters cooperation and problem-solving in community engagement. Additionally, it can strengthen the understanding and value of community values, especially when working with stakeholders of similar cultural and social identity.

Increases civic and community involvement

Incorporating engaging and relevant arts into your engagement allows stakeholders to remain interested, committed, and thirsty for additional opportunities to utilize their creative expression in the community. Depending on the context, stakeholders can use their artistic practices to support the outputs of your community engagement's intentions. Utilize the cultural blueprint which promotes cultural identity and expression as a drive for community development projects.

Honors the time stakeholders give

It supports a reciprocal relationship between you and the stakeholders. As you are asking for their time, insights and commitment, you can then offer them a fulfilling experience.

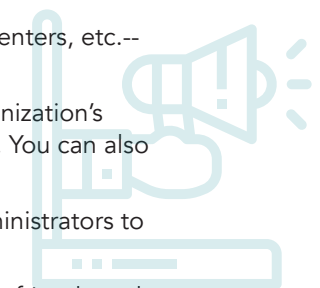
HOW ARTS AND CULTURE FIT IN THE COMMUNITY ENGAGEMENT FRAMEWORK

Arts and culture can both augment an Outreach and Consultation engagement. If facilitating a discussion, focus group, community input session, or any other group engagement, provide an opportunity in your agenda to incorporate icebreakers rooted in cultural identity, or an activity that allows stakeholders to get creative.

1.6 BEST PRACTICES FOR PROMOTING YOUR ENGAGEMENT

In support of the circulation of your messaging and promoting your engagement, it is important to design a communication strategy that can differentiate between messaging intended for engaged stakeholders, versus messaging intended for stakeholders designated to receive project outcomes.

- Create **a clear identity and message** for the engagement from the outset.
- The most effective promotion is **word of mouth**, ensuring your engagement has ways for stakeholders to invite their friends or colleagues (e.g. adding an "invite your neighbor" button to an email campaign).
- **Carry out broad outreach**, using multiple communication tools to reach the diversity of stakeholders (e.g. mailed and printed information, website and email lists, cable TV and PSAs). Include targeted outreach to communities of color and other affected groups that tend not to participate (consultations with leaders, info at community events, speakers, etc).
- **Have a single contact point for the public** (e.g. a hotline and/or email address) to provide easy access to information and provide input at the engagement.
- **Use media strategically** – press releases, feature stories, op-eds, news conferences, etc.--to announce initiation of the engagement; key milestones, and other decision-points. Focus on community newspapers and programs.
- **Use public facilities** – branch libraries, community centers, neighborhood service centers, etc.-- as information repositories to provide ongoing updates on the project.
- **Use technology to promote an interactive public process.** Use your agency/organization's website to provide information and opportunities for feedback on the engagement. You can also use online message boards and social media groups.
- **Find local groups** with an online and/or a social media presence, and ask their administrators to share a link to your engagement.
- **Email your entire staff and relevant local organizations.** Ask them to pass it on to friends and family (if applicable).
- **Hand out leaflets or QR codes at public events**, in the park, at public transit stations, or wherever else your audience may frequent.



CATALOG OF IDEAS

For specific outreach methods for individuals and groups, be sure to check out [Part IV - Catalog of Ideas](#).

1.7 CHECKLIST FOR PLANNING ENGAGEMENTS

Identifying our community engagement's purpose

- Have we identified the goals and desired outputs of the meeting or engagement?
- Have we revisited the [Purpose and Planning Tool](#) to support the clarity of our intentions?
- Have we reviewed the [Mini-Guide for Engagement Evaluation](#) and considered where evaluation fits in our engagement process?

Building our agenda

- Have we planned the dialogue so that it flows effectively and reaches the goals previously identified?
- Have we prepared a system for recording information?

Planning a safe, inclusive, and productive environment

- Have we planned for a space and tone that is inclusive and welcoming to all?
- Have we considered the ways that the experience is inclusive, accessible, and encourages participation?
- For virtual or phone engagements, have we chosen a platform that meets the digital access and inclusion needs?

Planning for participatory decision-making in our engagement

- Have we identified a participatory decision-making approach that helps to build consensus across our stakeholders?

Utilizing arts and culture in our engagement

- Have we considered ways to incorporate arts and culture to support community belonging and inclusive dialogue?

Best practices for promoting our engagement

- Have we designed a communications strategy for this engagement?
- Have we considered all possible stakeholders beyond our core stakeholders who can benefit from the engagement?

SOURCES

Americans for the Arts. [How Arts and Cultural Strategies Enhance Community Engagement and Participation](#).

Arts and Planning Toolkit. [What is Creative Engagement?](#)

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Rask, G. (2014). *Meetings with Meaning: A Guide to Strategic Collaboration*. Helsingborg: Greta Rask.

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Our problem-solving approach draws on human-centered design: we provide insights and services that strengthen our partners in the social sector to be equitable, responsive, and innovative. With over 10 years of experience, we have led engagements and projects that intersect with community development, library innovation, education, workforce development, affordable housing, re-entry planning, arts and culture, and more.

No matter the project, the needs of direct stakeholders are at the core of our process: we ensure that many voices and perspectives are represented in civic dialogue, depicted in social services, and are included in decision-making that impacts them most.

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