Advocacy & Communication SOLUTIONS

Engage Your Community Workbook

August 2018

Nonprofits, private businesses, government, foundations, or any combination of these may engage community members to test a new idea, change a public policy, or build support for a cause. Regardless of its purpose, engaging your community is a complex undertaking. The prospect of engaging others—whether one-on-one or in a group setting—can be intimidating, but with the right tools, you can effect positive change.

Community engagement is both a process and an outcome. It's a process in which organizations and individuals build ongoing relationships in order to elevate and apply their collective vision for community. It's an *outcome* in that people are willing, ready and able to advocate effectively for that vision.

This workbook is designed to help you think through key questions to begin engaging individuals from communities—small or large—to achieve your goals.

Before you begin, think about the ultimate goals you are trying to accomplish and how engaging community members will help you reach them.

Organizational goal(s):

1. _____

_____

_____

_____

_____

_____

_____

2. _____

_____

_____

_____

_____

_____

Would you like to learn more about how to plan and execute a highly effective community engagement effort? ACS offers several helpful tools, including Tips for Successful Engagement (https://www.advocacyandcommunication.org/wp-content/uploads/2018/03/ACS_Engaging_Community_new_bluereverse.pdf.

Potential outcomes of community engagement include:

► Inform the community about an effort or issue

► Increase visibility for your organization or initiative

► Increase the number of partners and allies that join your effort

► Collaborate with new partners and build trust

► Identify and/or activate ambassadors and leaders in the community around an issue or effort

► Determine what the community needs or their preferences

► Inform internal strategy or organizational direction

► Create buy-in on a particular strategy or effort

How will engaging the community help you reach this ultimate goal?

_____

_____

_____

_____

_____

_____

_____

_____

_____

Legendary Indiana University basketball coach Bobby Knight once said "I don't believe in luck. I believe in preparation." Once you've committed to engaging your community about a goal or issue that's important to you, it's critical to spend some time planning for the conversation. This section is designed to help you think about the big picture—why you're engaging, with whom, what you hope to accomplish, and how you will track success.

1. **What do you want to accomplish with your community engagement?**

_____

_____

_____

   In what timeframe?

_____

_____

_____

   Write down your community engagement goals.

_____

_____

_____

2. **Why is community engagement the right thing for you or your organization to do?**

_____

_____

_____

   What's the rationale for engaging at this time?

_____

_____

_____

3. **How do outside influences affect your timeline for community engagement?**

_____

_____

_____

_____

4. **Who do you want to engage? Consider geography (e.g., specific neighborhoods or boundaries such as counties), age, race/ethnicity, income level, occupation, political party, gender, voices that are often missed.**

_____

_____

_____

_____

_____

5. **Why do you want to engage these audiences?**

_____

_____

_____

How will these audiences help you achieve your organization's ultimate goals?

_____

_____

_____

_____

6. **What can you learn about your audiences in advance of engaging them?**

_____

_____

_____

How will this information help deepen your engagement?

_____

_____

_____

_____

_____

_____

7. **Who is responsible for doing the engagement work?**

_____

_____

_____

_____

_____

Do you have the right staff in place?

_____

_____

_____

Will you use other volunteers? *(This question may need to be revisited after you determine your engagement approach in Section 2).*

_____

_____

_____

8. **Will staff or volunteers doing the engagement require training?**

_____

If yes, who will provide the training?

_____

_____

_____

When will the training be conducted? *(This question may need to be revisited after you determine your engagement approach in Section 2).*

_____

_____

_____

9. **What challenges do you anticipate regarding capacity (e.g. staff time, funding, connections to community)?**

_____

_____

_____

_____

10. **What do you intend to do with the information you gather during the engagement?**

_____

_____

With whom will you communicate about the community engagement results? *Some organizations use it to direct strategy internally while others choose to make it public. This should relate directly back to how engaging the community will help you achieve your organizational goals.*

_____

_____

_____

11. **What does successful community engagement look like?**

_____

_____

_____

How will you know you are successful with your community engagement?

_____

_____

_____

12. **What milestones do you need to achieve throughout the process?** *This will help you adjust your strategy if necessary.*

_____

_____

_____

_____

_____

Now that you have identified what you want to accomplish and who you want to engage, it's time to get to the nuts and bolts of the engagement itself. This section will help you determine your approach to engagement.

1. **What is the best way to reach your target audiences given your purpose? There are many ways to engage an audience, each with their own set of pros/cons. Options include but are not limited to: focus groups, online surveys, interviews, presentations, email, speaking at a meeting, or hosting an informational table at an event. Think about the ideal location for your audience—places they gather and visit—and choosing a time of day that works with their schedules, not just yours. List how you plan to engage your audiences and develop a rationale for why that is the best choice for your audience.**

_____

_____

_____

_____

2. **Are there efforts already being undertaken in your community that can be leveraged? For example, is there a local fair or event where you can conduct surveys or interviews?**

_____

_____

_____

_____

Is there an organization with which you can partner to reach their members?

_____

_____

_____

_____

Is someone or some other organization already deeply involved in engaging the community? Can you partner with them to meet your needs?

_____

_____

_____

_____

Advocacy & Communication SOLUTIONS

Engage Your Community Workbook

7

Visit www.advocacyandcommunication.org or email info@advocacyandcommunication.org for more information. Follow us on LinkedIn.

©2022 Advocacy & Communication Solutions, LLC.

3. How will the approach you choose meet your audience where they are and help you meet your community engagement goals?

_____

_____

_____

_____

_____

4. Will you need to provide materials to your audience before or after your engagement with them? For example, this could include informational brochures about the issue or effort.

_____

_____

_____

5. If conducting engagement in-person, think about the location set-up. Will you need a table or chairs? A/V equipment?

_____

_____

_____

6. Will you be recording the engagement in some way? What is the best way to record this?

_____

_____

_____

7. If you are organizing a meeting, interview, or focus group, will you share information prior to the engagement?

_____

If yes, what information will you share?

_____

_____

_____

_____

_____

8. **What are you ultimately asking your audience to do? This is your Call to Action. List your Call to Action here (not all audiences may have the same Call to Action).**

_____

_____

_____

_____

_____

_____

Will all your audiences have the same Call to Action? If not, how will the Calls to Action differ?

_____

_____

_____

_____

_____

_____

A Call to Action

defines what you want your audience to do with the information you provide. You may ask your audience to:

► Provide thoughts through a survey or interview or focus group

► Share information with their network

► Attend a school board or city council meeting to make their voice heard in support of an issue

► Sign a petition

► Write a letter to a policy maker

► Many, many others

9. **Consider your Call to Action timing. At what point during your community engagement will you reveal the Call to Action? Some things to consider:**

► You may want to gather some input from the community to inform the Call to Action items.

► You may want to engage with community members for a period of time and build up trust before asking them for action.

► If you are engaging the same community members multiple times, you may consider revealing the Call to Action after you build trust through one or more engagements.

► If the engagement is a one-off and you will may not be engaging these individuals again, it might be important to start with your Call to Action. For example, explain why the issue is important, and what you are asking your audience to do.

_____

_____

_____

_____

_____

10. **What challenges or concerns do you anticipate your audience bringing up that might take you off course? List potential concerns here.**

_____

_____

_____

_____

_____

11. **What will your responses to these concerns be?**

_____

_____

_____

What solutions can you offer? List how you will address the concerns here.

_____

_____

_____

12. **Will you need the support of anyone else for this engagement?** _Allies and 3rd party validators are often unexpected supporters who do not have a direct stake in your issue, and can be a valuable in carrying your message and being a spokesperson about the importance of your effort._ **Name partners (individuals or organizations) who can help you engage your audiences.**

_____

_____

_____

_____

_____

How will you bring them up to speed?

_____

_____

What is your specific ask of them? (e.g., attend a meeting with you, send out information or invitations)

_____

_____

Advocacy & Communication SOLUTIONS

Engage Your Community Workbook

10

Visit www.advocacyandcommunication.org or email info@advocacyandcommunication.org for more information. Follow us on LinkedIn.

©2022 Advocacy & Communication Solutions, LLC.

13. If your engagement will be online, what tools do you need to conduct and track the responses (e.g., online survey tools)?

_____

_____

_____

Who will test your survey in advance to ensure it is clear and concise?

_____

_____

_____

Section 3: Know Just What to Say

Now that you know WHO you'll be talking to and HOW you will approach them, it's time to think about WHAT you'll say. You may already have messages created for your effort. In case you do not, use the questions below, and these additional ACS tools to help you craft your messages: Giving Jargon the Boot (https://www.advocacyandcommunication.org/wp-content/uploads/2018/04/ACS_Giving_Jargon_the_Boot_2-1.pdf) and a Guide to Message Creation (https://www.advocacyandcommunication.org/wp-content/uploads/2018/04/ACS_Message_Creation_Checklist.pdf).

1. What will you say during the engagement? List your talking points here.

_____

_____

_____

_____

_____

_____

2. What will you ask your audience to provide input on? List your questions here.

_____

_____

_____

_____

_____

_____

3. At a minimum, what are the 1–2 primary ideas or questions you want to communicate to your audience? *Think about this with the amount of time you will have during the engagement in mind. You might plan for an hour, but it could turn into 30 minutes. Or 30 minutes could turn into 10. You may have additional information you want to convey or questions you want to ask, and it is OK to have those questions in your back pocket! Also keep in mind you should convey the same ideas and questions during every engagement for consistency.*

_____

_____

_____

_____

_____

_____

Next you may want to create messages to describe your effort publicly.

4. What are the three to four key messages you want to convey during the engagement that describes your effort? What are the supporting messages? If you need help developing key messages, refer to ACS' messaging tools: Giving Jargon the Boot (https://www.advocacyandcommunication.org/wp-content/uploads/2018/04/ACS_Giving_Jargon_the_Boot_2-1.pdf) and a Guide to Message Creation (https://www.advocacyandcommunication.org/wp-content/uploads/2018/04/ACS_Message_Creation_Checklist.pdf).

_____

_____

_____

_____

_____

_____

_____

5. Find someone who was previously opposed to—but now supports—your issue. Ask what changed their mind. How can you use that knowledge to strengthen your messages?

_____

_____

_____

_____

6. **Will your messages vary based on your audience?**

_____

How?

_____

_____

_____

7. **Will they vary based on the method of engagement?**

_____

How?

_____

_____

_____

8. **What level of knowledge does your audience already have about the issue?**

_____

_____

_____

What gaps will you need to fill?

_____

_____

_____

9. **Are there other messengers who can support your efforts? List the individuals who can be spokespersons for your effort or engage the community on your behalf (these may or may not be the same as the 3rd party validators listed above).**

_____

_____

_____

_____

_____

_____

10. **What personal examples or real-life scenarios can you cite to keep your message authentic? List them here or in a separate document, and integrate them into your messages and/or talking points.**

_____

_____

_____

_____

_____

11. **Is data available to support your messages?**

_____

If so, list the data points here, and integrate them into your messages and/or talking points.

_____

_____

_____

_____

_____

Section 4: Following Through

Now that you have completed your engagement, what is your plan for following up? How do you help your goals and outcomes come to fruition? Review ACS' Five Rules for Policymaker Engagement (https://www.advocacyandcommunication.org/wp-content/uploads/2018/04/Five_Rules_for_ Policymaker_Engagement.pdf)—regardless of your audience, these rules will help you build a plan for next steps and closing the engagement loop.

1. **After the engagement, ask yourself: did you gain any knowledge that affects your position?**

_____

_____

_____

_____

_____

2. **Assess how well your messaging and engagement worked. Use ACS' Measuring Your Communication Impact tool** (https://www.advocacyandcommunication.org/wp-content/uploads/2018/04/ACS_Measuring_Communication_Impact-2-1.pdf) **to track how well your messages are reaching your audiences.**

_____

_____

_____

_____

_____

_____

3. **Do you need to adapt your engagement approach, ask, or messages with everyone? With specific audiences? If so, how?**

_____

_____

_____

_____

_____

_____

_____

_____

4. **Are there additional audiences you need to engage?**

_____

_____

_____

_____

_____

Engage Your Community Workbook

Advocacy & Communication SOLUTIONS

15

Visit www.advocacyandcommunication.org or email info@advocacyandcommunication.org for more information. Follow us on LinkedIn.

©2022 Advocacy & Communication Solutions, LLC.

5. **What will you do with the information you collect? Will the information be publicly shared? Used to inform a strategy? (Note: You thought about this in Section 1, question 10. Now it's time to follow through).**

_____

_____

_____

_____

_____

Who will receive the information? How will it be shared (e.g., email, meetings, etc.)

_____

_____

_____

_____

_____

Who will quantify and share the results?

_____

_____

_____

6. **Will you continue to engage these audiences? If yes, how? If not, how will you close the loop?**

_____

_____

_____

_____

_____

_____

_____

7. How will you make sure this is not a one-sided conversation? What is the feedback loop with those you engage?

_____

_____

_____

_____

_____

8. List your next steps or follow-up.

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

9. What one lesson did you learn that would share with others?

_____

_____

_____

_____

_____

_____