

Grassroots Project

Public Engagement Toolkit

**Guide for State Teams to Expand
Meaningful Public Engagement**



GRASSROOTS PROJECT
ENGAGE  CONNECT  ADVOCATE

This Toolkit was produced for Human Services Research Institute (HSRI) by Collective Insight, in partnership with SoulTouchin Experiences, as part of the Grassroots Project.

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This Toolkit is a living document that can always be improved. If you have questions about this document or suggestions for how this Toolkit can be improved, please contact Grassroots@hsri.org.

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[Collective Insight](#) is a Nationally Certified Women’s Business Enterprise (WBENC, 2025) that brings 23 years of science-backed engagement leadership. Collective Insight designs and implements high-quality community engagement strategies that center lived experience in the design and improvement policies, programs, and research.



SoulTouchin’ Experiences (STE) LLC directs policy and programs by and for the disability community. With an emphasis on inclusion and empowerment, STE centers voices and experiences of people with disabilities through training and development, diversity and community outreach, and policy development and implementation.



[Human Services Research Institute \(HSRI\)](#), a 501(c)(3) nonprofit, has dedicated 50 years to improving systems that change lives. We craft person-driven health and human service systems through collaborative, community-engaged research and evaluation, analyzing both quantitative and qualitative data. By partnering with community leaders and change agents, we identify best practices, address challenges, and solve problems.



ACL’s [Grassroots Project](#) supports the work of disability advocates to ensure the perspectives, priorities, and preferences of disabled people are reflected in disability policies and service systems. The project facilitates partnership development and collaboration among national, state, and local disability advocates and creates opportunities for the disability community to be informed about policies that affect them.

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Toolkit Overview

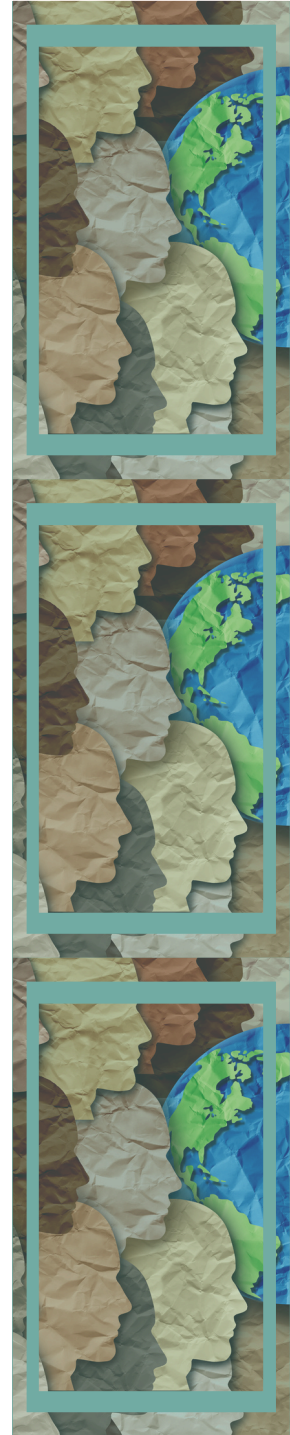
Defining Engagement

*Public engagement, or engagement for short, is the inclusion of service recipients, their family members, and their support systems in the design and improvement of programs, policies, and systems. When engagement is implemented effectively, communities directly impacted by these programs, policies, and systems help ensure they are accessible, cost-effective, and lead to the positive outcomes intended. Ultimately, engagement ensures your work is relevant, safe, and welcoming to the communities most in need while building stronger relationships with these communities.

Public engagement looks different depending on your goals and the needs of the communities you intend to engage. Often, teams use a range of approaches to engage communities, such as hosting advisory structures, community forums, workgroups, focus groups, interviews, and more. Engagement may be especially beneficial when:

- Designing new programs that are person-centered and reflective of community needs and priorities
- Improving existing programs to drive equitable access and outcomes
- Expanding programs to new geographic areas or target groups
- Prioritizing funding cuts that center community-determined priorities
- Addressing public relations challenges by understanding unique communities' needs and applying community-driven solutions

*Public engagement is commonly referred to as “community engagement” across many disciplines and communities. For this reason, you may see “community engagement” used in resources shared in this Toolkit or hear it used by your partners.



Toolkit Overview

Toolkit Purpose

Collective Insight developed this Toolkit in partnership with the Human Services Research Institute to support State Teams in advancing meaningful public engagement in their work. The Toolkit offers practical strategies, self-reflection activities, and hands-on tools designed for State Teams with varying levels of experience, goals, and contexts. The Toolkit recognizes that State Teams have limited time and financial resources. It provides concrete yet flexible strategies to help State Teams meet engagement goals in the face of these very real limitations.

Toolkit Contents and Recommended Use

The Toolkit contains four chapters organized around four primary drivers of public engagement:

1. Reflecting and Preparing for Engagement;
2. Building and Sustaining Partnerships;
3. Creating Systems to Support Engagement; and
4. Implementing and Continuously Improving Engagement.

To gain the most from this Toolkit, we recommend teams review it in its entirety, then address these four chapters in sequential order. Each of the chapters consists of the following subsections to support your work:

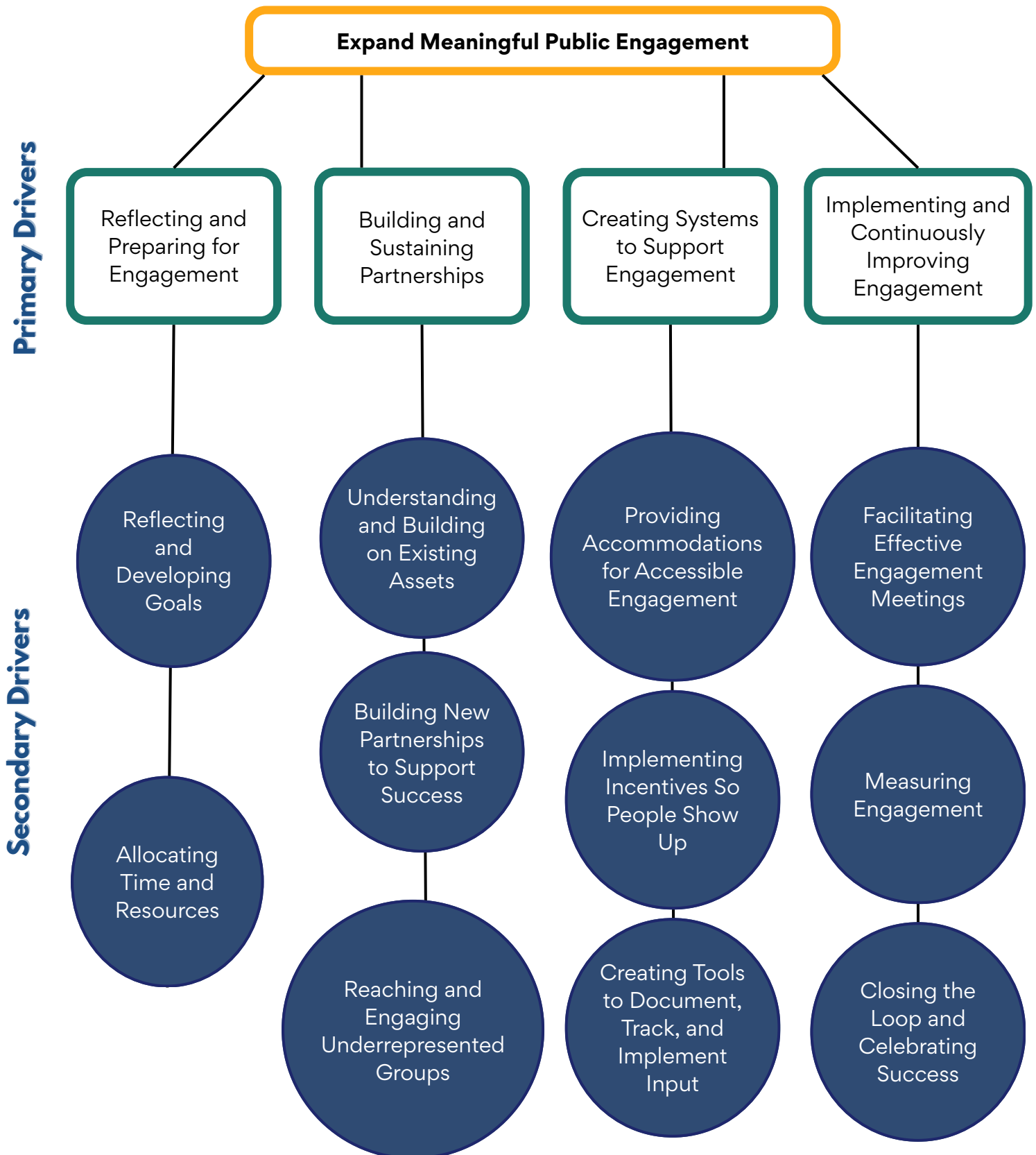
- Secondary driver strategies and action steps to achieve the primary driver
- Self-reflection questions to support team discussions as they work through primary drivers
- Sample measures of success that demonstrate teams are on the right path
- Concrete tools, resources, and examples of strategies in action to support success



Toolkit Introduction Video with Keith Jones & Sophia Webber

Driver Diagram

Global Aim



Secondary Drivers and Action Steps

CHAPTER ONE

Reflecting and Preparing for Engagement

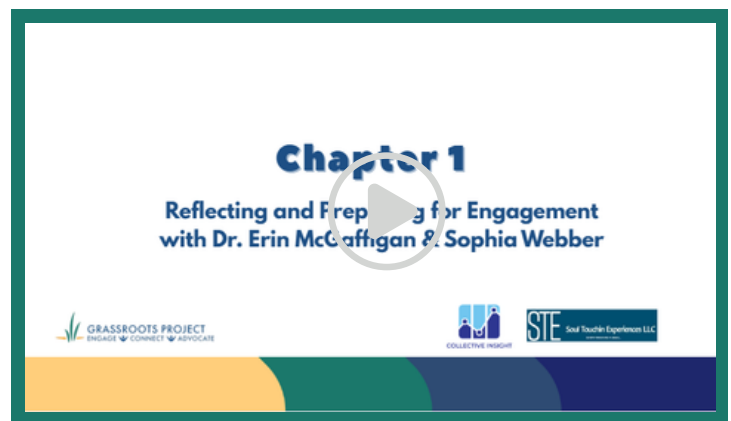
Overview

Successful engagement requires intentional reflection and preparation. It is common to jump into engaging communities without establishing goals for engagement or identifying who should be engaged to accomplish those goals. Without proper planning, teams often rely on assumptions of what works, what is possible, or what seems easiest- which may be misguided, costly, and even ineffective.

In this chapter, we outline strategies to help teams reflect on past engagement experiences and clarify future engagement goals, so they can align their plans with the time and resources needed for success. This reflection ensures teams apply their already limited time and resources meaningfully to achieve the outcomes desired. Reflection and preparation are the first steps to providing communities with clear and consistent messaging, which saves time and builds trust in the long run.

Secondary Drivers

- Reflecting and Developing Goals
- Allocating Time and Resources



Chapter 1 Video: Reflecting and Preparing for Engagement with Dr. Erin McGaffigan

Reflecting and Developing Goals

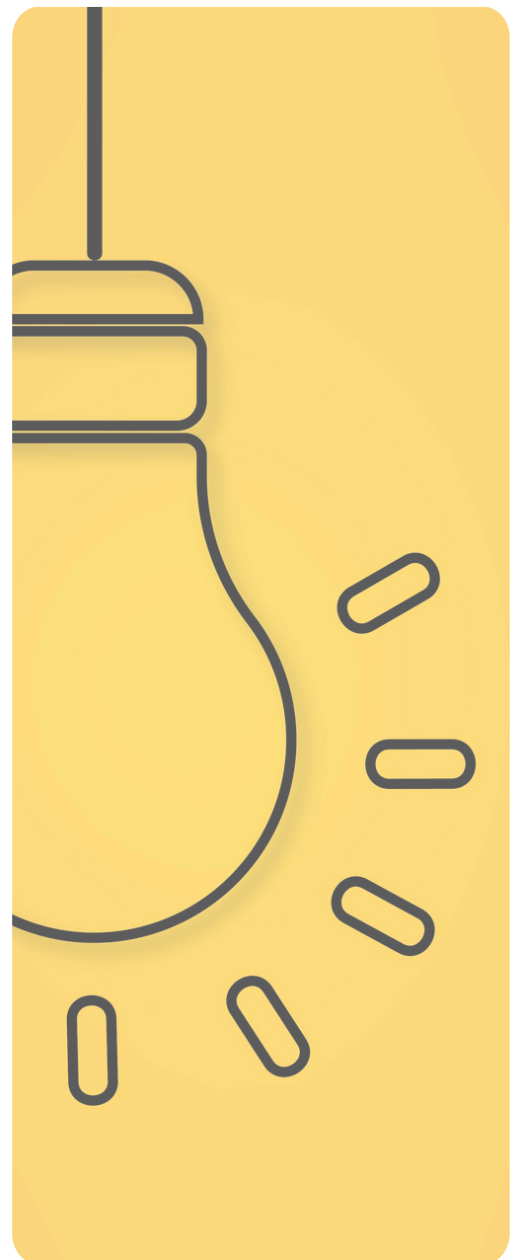
Reflection is a personal process that may look different for each team. Even so, an effective reflection process requires humility, collaboration, openness to new perspectives, and a commitment to developing clear, actionable engagement goals. In this section, we outline steps to guide effective reflection, group brainstorming, and an iterative goal-setting process to support both short- and long-term engagement success.

Self - Reflection Questions

- When thinking about previous engagement activities, what did we do, what worked well, and where did we struggle?
- What communities have been effectively engaged and what communities are often missing?
- What does success look like in 3 months? 6 months? 1 year? 3 years?
- What are our biggest hopes and fears?

Engagement Tip

Whenever possible, engage community leaders to understand what worked well and not so well in previous engagement. This is an opportunity to build trust for future partnerships, including reaching communities previously left out.



Reflecting & Developing Goals

Action Items & Task Lists

Reflect on Previous Engagement

- Identify colleagues and/or partners that engage communities and may have lessons learned to share.
- Host meetings with colleagues and/or partners to discuss engagement experiences and reflect on how you can build on these experiences.
- Explore engagement methods used, partners engaged, outcomes, and lessons learned from these experiences.

Explore Engagement Goals and Potential Scope

- Host meetings with colleagues and/or partners to brainstorm your goals for engagement. Consider what you need to learn, when you need to learn it by, and what success may look like.
- Explore the diversity of people who need to be engaged and the demographics and experiences of those possibly missing from previous engagement activities.
- Determine when engagement needs to happen to have the most influence on your work. For instance, when you are exploring a new idea for a project or service, when you are starting to plan a public comment period, and before you have to present policy recommendations to leadership.

Document Your Learnings and Seek Leadership Buy-In

- Gather all your notes and summarize your learnings, including preliminary engagement goals, communities, and required timeframes. Create a short, easy to read summary to inform your work from here.
- Share your summary with leaders who are impacted by your work. Request that they validate and help you refine your goals, timelines, and scope based on environmental factors, such as political mandates, upcoming legislative sessions, and regulators' requirements.

Reflecting & Developing Goals

Measures of Success



You have discussed and documented lessons learned from previous engagement experiences.



You have discussed and documented goals, intentional representation, and timelines for your upcoming engagement initiative.



You have created a clear, concise written summary of what you learned through the reflection process, including preliminary engagement goals, communities to reach, and required timeframes, and revised it based on leadership's review and discussion.

Tools and Resources to Support Success

- Link: [Collective Insight October 2023](#)
- Newsletter: [Engagement is a Human Process](#)
- Appendix A: [Asset Mapping Checklist](#)



Coming Up

Use asset mapping as a tool to understand previous engagement activities, obstacles, underrepresented voices, and lessons learned. Learn more about asset mapping in [Chapter 2](#).

Allocating Time and Resources

Timelines and budgets are always tight, so reflecting on existing assets and resources and how they can support engagement goals is crucial. No matter the context, engagement requires time for teams to plan, host, and follow up from meetings as well as to implement and document changes that result from this engagement.

Engagement Tip

When seeking buy-in and allocating resources to engagement, consider how engagement serves your organization's mission.

Engagement may also require time and resources to support partners' accommodations, such as interpretation services, and incentives to encourage communities to show up, such as stipends. In this section, we offer steps for assessing resources for your engagement initiative, even when time and budgets are tight, supporting teams to successfully initiate and sustain effective engagement.

Self - Reflection Questions

- How can we tap into the existing skills and interests of our team? What team members already excel at relationship building, project management, or conflict resolution?
- How does our agency or organization support accommodation needs, if at all? For instance, are there existing budget lines for interpretation and translation services? Do we have partners, such as medical schools, that are already supporting our work in this area?
- How will our engagement be a part of the solution to existing challenges? Is there funding set aside to address those challenges that can be used to support our process?



Allocating Time and Resources

Action Items & Task Lists

Assess Existing Assets and Plan for Resources Required

- Identify skillsets necessary for achieving your goals within your timeline, such as project management and meeting facilitation.
- Review existing projects, programs, grants, and partnerships (e.g., with medical schools and across agencies) that already conduct engagement or have a mandate for engagement for potential integration of resources.
- Identify opportunities for creativity and any limitations in your available resources to support engagement, including allocating team member time for community outreach, event coordination, and providing accommodations and/or incentives.
- Develop an initial budget for engagement based on these reflections, which includes funding for team member time, product development, community outreach, in-person or virtual meeting costs, accommodations (e.g., community travel assistance and interpretation and translation services) and incentives (e.g., meeting refreshments, gift cards, or stipends).

● ●Coming Up

Visit [Chapter 3](#) to explore strategies for understanding and identifying accommodations and incentives in your work

Allocating Time and Resources

Dedicate Team Resources to Implement and Sustain Engagement

- Identify team members who are already conducting engagement or required to do engagement as a part of their existing role.
- Assess how these team members' responsibilities align or support your engagement goals.
- Identify potential alignment between engagement goals and existing programmatic goals. Consider how additional team member allocation needs may be met through engagement.
- Meet with team members who can support engagement to discuss engagement goals, their previous engagement experiences, and their own engagement development goals.
- Connect team members to best practice training, tools, and/or resources to support their success and mitigate engagement burnout, including on meeting preparation, facilitation, and documentation; reflective listening and conflict resolution strategies; and providing accommodations and incentives.
- Ensure team members have the time and resources to support engagement by reviewing and possibly revising job descriptions and recognize their investment during performance evaluations.



Allocating Time and Resources

Measures of Success

✓ You have identified projects, programs, and/or funding sources that are already funding some level engagement and/or have funding relevant to your goals that can support the process.

✓ You have identified team members who are already responsible for engagement or have job responsibilities that align with your engagement goals that can be tapped to support your success.

✓ You have met with team members to understand their previous engagement work, obstacles, and learning needs and have identified strategies to support their success and mitigate burnout.



Tools and Resources to Support Success

- Appendix B: [Engagement Tasks and Responsibilities Considerations](#)
- Appendix C: [Team Member Training Resources](#)

CHAPTER TWO

Building and Sustaining Partnerships

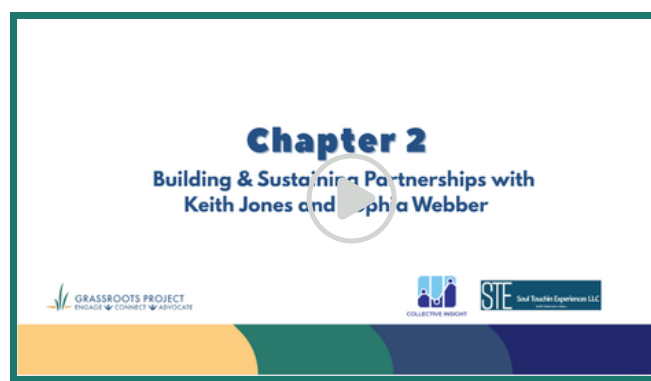
Overview

Building genuine partnerships is an important step in developing any meaningful and sustainable engagement strategy. These partnerships can be integral in assisting teams to identify communities commonly left out of engagement, help outreach to communities, and help make engagement accessible by hosting events where community members live and work. Partners include not only those who access services, but any individual or group that supports them, including faith-based organizations, community service organizations, advocates, providers, associations, schools, public safety entities, academic institutions, and more. Building partnerships takes time, flexibility, creativity, and a willingness to align engagement goals with community needs. Relationships must be consistently nurtured for teams to experience long-term, positive impacts. Be prepared to learn from your partners and, as a result, move beyond traditional engagement strategies to reach and engage more people than would otherwise be possible.

In this chapter, we explore three strategies aimed at building and sustaining partnerships: understanding and building on existing assets, building initial partnerships, and reaching and engaging underrepresented groups.

Secondary Drivers

- Understanding and Building on Assets
- Building New Partnerships to Support Success
- Reaching and Engaging Underrepresented Groups



Chapter 2 Video: Building and Sustaining Partnerships with Keith Jones

Understanding and Building on Existing Assets

Asset mapping helps you to understand and build upon your existing assets to foster engagement that enhances trust, saves time and resources, and deepens community relationships. Asset mapping is a process to identify and visually display existing community partnerships and engagement activities, engagement opportunities and gaps, as well as lessons learned. Asset mapping serves as a durable foundation for effective, sustainable public engagement that builds upon, rather than reinvents, existing relationships and initiatives. Taking time for this process also helps you identify communities commonly left out of your engagement and opportunities to build partnerships that address those gaps. It is important to conduct asset mapping before you embark on any new engagement initiative, in fact, you may notice asset mapping questions and processes are integrated throughout the sections of this toolkit, such as in our section on [Reflecting and Developing Goals](#). It is equally important to recognize asset mapping is an iterative process that should be reviewed and built upon during each phase of engagement.

In this section, we outline the typical steps to creating and acting upon your asset maps, including refining your scope, brainstorming, validating, and continuously improving your maps to inform your engagement activities.

Self - Reflection Questions

- How do we communicate with and hear from communities already?
- Who are trusted leaders in the communities we need to reach?
- Does our map reflect what we've heard? What gaps should we explore with our key partners?

Engagement Tip

Remember to also check in on your internal and inter-agency partnerships. Effective collaboration with colleagues supports sustainable relationship building in communities

Understanding and Building on Existing Assets

Actions Items & Task Lists

Establish Your Scope

- Identify a few colleagues and/or partners invested in your engagement work that may have lessons learned to share, such as those who participated in your reflection and goal setting process.
- Review your engagement timeline and determine parameters for your asset mapping process, such as when you must complete the initial map and if you will convene new meetings or join existing meetings.
- Host or attend a meeting with colleagues and/or partners to review your engagement goals and determine the scope for your asset mapping process; consider what you hope to learn from asset mapping and who you will impact through your engagement process.

Explore Your Engagement Landscape

- Use 2-3 meetings to explore your engagement landscape, such as: existing partnerships and current engagement activities; voices you seek to engage, including voices often left out traditional engagement activities; trusted leaders in the communities you seek to engage; and lessons learned from previous engagement activities.
- Ask open-ended questions that avoid assumptions about engagement, such as: “How do we currently communicate with or hear from communities?” “Have we conducted engagement before, such as town halls or focus groups? What worked well? What was challenging?” and “Who is already trusted within the communities we are trying to reach?”
- Document everything you hear in raw, messy meeting notes.



Engagement Tip

Think broadly about communities to reach voices you may not have engaged in the past. For instance, consider both cross-disability organizations, such as centers for independent living, and disability-specific organizations, such as brain injury associations

Understanding and Building on Existing Assets

Actions Items & Task Lists

Display Your Engagement Landscape in Asset Map

- Review your notes and organize similar activities, themes, and ideas into groups; don't be afraid of trial and error- this process may take a few rounds of moving your notes around.
- Use your organized notes to create simple visuals, diagrams, and charts to display your information.
- Fill in gaps that emerge by doing additional research on previous and current engagement activities and demographics of the communities you want to engage.

Continuously Refine Your Map

- Share the visuals with colleagues and partners and have additional conversations with them about what may be moved, added, or refined to better represent existing knowledge and experiences.
- Use the draft of your map as a facilitation tool for working with partners who can help you identify communities, assets, gaps, and opportunities that may be missing from your map.
- Make revisions based on these conversations and remember that your asset map is a living document; identifying and filling in gaps will be an ongoing part of the process.



Understanding and Building on Existing Assets

Measures of Success

✓ You have created messy notes that help you understand what is already happening in terms of engagement relevant to your work, communities already engaged, communities that are missing, and lessons learned from previous engagement activities.

✓ You have created your first round of asset maps that reflect your engagement landscape, including your opportunities to build on existing engagement activities and opportunities for growth in community reach.

✓ You shared your first round of asset maps with colleagues and community partners to validate what you have learned and to identify opportunities to improve maps.

Tools and Resources to Support Success

- Appendix A: [Asset Mapping Checklist](#)
- Link: [Asset Mapping Toolkit](#)


Building Key Partnerships to Support Success

Engage key partners early and where they are in communities to develop foundational relationships that strengthen your overarching engagement work. Key engagement partnerships are unique and dynamic, based upon the goals and needs of all those involved. Partners are busy and have competing resources, just like you. So, take time to learn what's in it for them to engage with you. Developing new relationships with key partners early ensures your process is reflective of community needs and priorities from the initial design onward.

In this section, we outline steps to build new partnerships, starting by doing your homework, reaching out, and meeting communities where they are. From there, we build relationships founded upon mutual goals and support, engage partners early and often, and document and follow up all connections.

Self - Reflection Questions

- What partners do we already work with in the communities we seek to engage?
- How are our priorities aligned (or misaligned) with our partners? How can we support our partners' goals?
- Where can we go to meet community members in their settings?

**Engagement Tip**

Be genuine and honest to develop a real human connections with partners.

Building Key Partnerships to Support Success

Actions Items & Task Lists

Do Your Homework, Reach Out, and Meet Communities Where They Are

- Use your asset map to identify where to start, such as potential allies to reach out to and/or communities impacted by your work that you seek to engage.
- Understand the history of your topic of interest and how that history impacts your work; acknowledge and build upon the work done before you.
- Review resources created by the community you wish to partner with, including outreach materials, campaigns, or even social media posts to build on and tailor in your process.
- Reach out to and meet existing partners and new allies where they are in communities (rather than expecting partners to come to you) to build trust and expand your reach; consider calling, grabbing a coffee, or attending existing events, such as a cultural festival, where appropriate.



Engagement Tip

Respect community boundaries as you enter community spaces.

Build Connection on Mutual Goals and Support

- Take time to understand partners' goals and priorities to forge meaningful and reciprocal relationships; consider how partners' goals align or misalign with your goals to create clear expectations for partnership.
- Discuss partners accommodation needs as well as financial (e.g., stipend or gift card) and non-financial incentives (e.g., networking or co-authorship) that support their collaboration with you.
(visit [Chapter 3](#) for more information on this process)
- Create clear expectations about goals, responsibilities, and support to ensure all partners are on the same page and have access to the same information to succeed.
- Demonstrate your desire to learn and willingness to change.

Building New Partnerships to Support Success

Actions Items & Task Lists

Engage Partners Early, Often, and Ongoing

- Meet with partners for project-specific activities to achieve shared goals and meet project expectations.
- Use routine check-ins or informal conversations to ensure partners feel supported in your process.
- Keep momentum with partners after or between projects such as, inviting them to events or check-ins, to keep them excited about the work and sustain trust.

Engagement Tip

Understanding and supporting partner's goals is a foundational element of building partnerships. This goes beyond simply learning about partners goals- instead, prioritize transparent conversations about where there is alignment in goals, factors that might limit your ability to meet them, and shared expectations for moving forward.

Document and Follow Up on All Connections

- Use meeting notes or other forms of clear documentation of meetings to keep track of what you hear and learn from partners.
- Use documentation to track how your engagement of your partners impacts change.
- Share your documentation with partners and broadly (in various formats) to show how partners you hear them and are trying to make change that meets your shared goals.

Building New Partnerships to Support Success

Measures of Success

✓ You have reviewed resources created by the community you seek to engage.

✓ You have connected with 1-2 partners for a phone call or meeting.

✓ You have documented and addressed partners' goals, accommodations, and incentives for engaging.



Tools and Resources to Support Success

- Link: [CI Newsletter : Don't Delay Engagement](#)
- Link: [CI Newsletter : The Usual Suspects](#)
- Link: [CI Newsletter : Listen to Your Data](#)

● ● Engagement Tip

Worried you are always engaging the same people? Check “The Usual Suspects” CI Newsletter to learn how to identify who is showing up to your process and why, how to build peer support, and infuse diverse voices into your work

Reaching and Engaging Underrepresented Groups

Your asset maps and formation of early, key partnerships are important first steps to conducting outreach and engaging communities. Even so, it is important to recognize that there are many communities that are not ever reached through traditional outreach and engagement activities. Teams must stop and reflect on this reality and work directly with local community leaders to understand who may be missing and identify genuine ways to include underrepresented groups. This knowledge sharing and reflection will take time, including time to be present at community events and joining meetings with community leaders to simply listen. Not every community, or even individuals within a community, will want to engage in the same way. Genuine engagement of groups previously underrepresented requires a team's willingness to step away from conventional engagement tactics and towards creative activities that meet community members where they live and work.

In this section, we outline steps to continuously think about and apply innovative strategies that cultivate meaningful relationships with underrepresented communities. This process begins with reflecting on your organizational culture and the “why” behind engagement, then, connecting with partners to develop and implement thoughtful, tailored engagement plans.

Self - Reflection Questions

- What does culture mean to each of us?
- What are our organizational beliefs, values, mission, and priorities?
- How do we define engagement? Why is it important to our mission?
- Who is impacted by our work, but often underrepresented in our engagement?

Engagement Tip

Recognize that individuals within the communities you seek to engage are human above all else and come to engagement with unique lived experiences, including positive relationships, systems of support, and in some circumstances, trauma.

Reaching and Engaging Underrepresented Groups

Actions Items & Task Lists

Reflect on Your Personal and Organizational Cultures and the “Why” Behind Engagement

- Meet with team members to assess your personal and organizational beliefs, values, mission, and priorities pertinent to inclusion to understand your readiness to engage.
- Share input you have received during informal and/or formal conversations within communities with team members and organizational leaders and discuss how this input aligns or misaligns with the organization’s desired culture and priorities.

Connect with Partners to Develop Thoughtful, Tailored Engagement Plans

- Continue to do your homework on underrepresented communities you seek to reach, including understanding needs, potential past harms, and existing initiatives.
- Connect with community leaders to learn about their communities and how to build and sustain partnerships. Consider using your asset map as a starting point for conversations about where communities are already engaging, incentives to engage further, and language support and accommodations needed for meaningful engagement.
- Brainstorm with community leaders about diverse outreach mechanisms that align with the needs of the communities you seek to engage, such as visiting fairs, schools, grocery stores, faith-based events and using videos, social media, and public advertisements.
- Update your asset map and use this information to create an outreach plan that includes goals, tasks, responsible parties, and measures of success.
- Create tailored resources and materials to reach new communities based on new learning such as, translating your materials to a new language or making your flyer into a two-minute video.

Reaching and Engaging Underrepresented Groups

Actions Items & Task Lists

Practice, Implement, and Improve on Tailored Engagement Plans

- Discuss your plans with trusted partners for validation ahead of putting plans into action.
- Create a safe space for team members to share their fears and hopes. Encourage trying new strategies and learning from setbacks, while prioritizing the safety of and respect for the time of those you seek to engage.
- Launch your outreach plan and prepare to document lessons learned as you go.
- Work with new partners to identify gaps and innovative solutions to address those gaps.
- Update your outreach and engagement plans based on what you practice internally and learn from communities.



Building New Partnerships to Support Success

Measures of Success

Your team has reflected on organizational culture and how existing norms may be limiting opportunities to engage more diverse communities.

You have worked with partners to identify one or more new communities to engage and strategies to make outreach and engagement more accessible.

You developed a plan for reaching communities and validated it with key partners.

You have initiated this plan and continue to learn and grow based on this experience.

Tools and Resources to Support Success

- Appendix D: [Organizational culture worksheet](#)
- Link: [Keith Jones: Breaking Barriers Through Creativity](#)
- Link: Success Story Engaging Underserved Communities: Healthier Black Elders Center- [Podcast and Blog](#)

CHAPTER THREE

Creating Systems to Support Engagement

Overview

Creating systems to identify, track, and follow up on accommodations, incentives, and input in your engagement is a crucial step towards meaningfully supporting your partners. In this chapter, we outline three strategies that support sustainable engagement work, including assessing and addressing accommodations, implementing incentives to engage, and documenting and tracking partner input. Investing in these systems will help you maintain consistency, make ongoing improvements to your process, and build trust with partners along the way.

Secondary Drivers

- Providing Accommodations for Accessible Engagement
- Implementing Incentives So People Show Up
- Creating Tools to Track and Implement Input So People Come Back

Providing Accommodations for Accessible Engagement

To make engagement meaningful, it must be accessible. The most successful teams take time to understand accessibility mandates and best practices. Going beyond state and federal mandates by listening to the needs communities identify and tailoring outreach and engagement strategies accordingly is an essential step to building trust, getting people to show up, and translating time and effort into fruitful results. Providing accommodations is not a one-size-fits-all process. Instead, it is continuous practice of self-reflecting, asking, implementing, evaluating, and improving, especially since each person's needs are unique and fluid. Providing translation and interpretation services, closed captioning, hosting preparation meetings and sending materials ahead of time, taking breaks, and ensuring wide spaces at and between tables for wheelchair maneuverability are all examples of commonly requested accommodations. At its core, accessible engagement is driven by the needs and preferences of all those involved. Even so, implementing best practices, such as communicating in plain language, implementing processes to identify and address individuals' accommodation needs, and adhering to Americans With Disabilities Act (ADA) guidelines, provides a strong foundation for a responsive and flexible process.[1]

In this section, we outline steps to support teams to provide meaningful accommodations. More specifically, we share examples of what accommodations might look like in your work and strategies to build accessibility directly into your engagement policies and practices.

Self - Reflection Questions

- What stands in the way of communities meaningfully accessing our process?
- Who knows the most about creating accessible materials and meetings, and how can we learn from them?
- Who can we partner with to support accessibility given our limited time and resources?

[1] Americans With Disabilities Act of 1990, Pub. L. No. 101-336, 104 Stat. 328 (1990).

Providing Accommodations for Accessible Engagement

Actions Items & Task Lists

Understand Accommodations in Your Work

- Review accommodation requirements best practices, such as the [ADA guidelines](#) as well as [this resource](#) on accommodations for individuals returning to work after brain injury. Check out our [In-Person Accessibility Checklist](#) and [Plain Language Newsletter](#) for additional context on best practices.
- Connect with colleagues and community partners who have experience coordinating accessible services in the local communities you seek to engage, such as individuals coordinating translation, interpretation, and transportation.

Build Accessibility into Your Policies and Practices

- Identify resources for assessing and addressing accommodations, such as providing interpretation services, and dedicating team member time to the process.
- Locate or create a list of resources for understanding, assessing, and providing accommodations, such as independent living centers, cultural community centers, community colleges, interpreter and translation service agencies, and public transportation agencies.
- Ensure all team members review accommodations best practices; take time to discuss the importance of accessibility; implement best practices, including using plain language, across all engagement activities.
- Draft procedures to ensure accommodations are consistently offered, documented securely, addressed, and evaluated for improvement.

Providing Accommodations for Accessible Engagement

Actions Items & Task Lists

Identify and Address Accommodations Early and Ongoing

- Assign a person to administer your accommodation procedures and to act as the point person in your engagement initiative for community members to share and address accessibility needs.
- Include language in your outreach materials that makes the availability of accommodations clear to community members; make sure this language is accessible, including in required languages, larger text, and distinct color contrast.
- Ask partners about their accommodation needs as early as possible, through surveys and early 1:1 discussions.
- Securely document individuals' accommodation needs and how these needs are addressed.
- Assess individuals' satisfaction with accommodations through discussions and post-meeting surveys to ensure you are meeting accommodation needs.
- Document feedback you receive on how to improve accommodations and make improvements whenever possible.



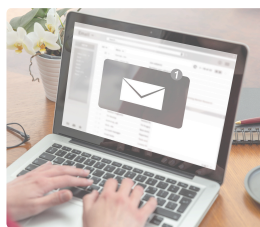
Providing Accommodations for Accessible Engagement

Measures of Success

You have notes from community partner meetings and demographic research to inform your accessibility strategies.

You have written procedures to identify, address, and improve accommodations prior to launch of materials and meetings.

Partners consistently attend and participate in (and between) meetings.



Tools and Resources to Support Success

- Link: [In-Person Accessibility Check List](#)
- Appendix E: [Sample Accommodations Survey](#)
- Link: [Americans With Disabilities Act \(ADA\) Guidelines](#)
- Link: [Collective Insight 2023 Newsletter: Plain Language](#)
- Link: [Navigating Reasonable Accommodations: Preparing for return-to-work after brain injury](#)



Chapter 3.1 Video: Using Plain Language

Implementing Incentives So People Show Up

We all have limited time and resources- because of this, we make daily decisions on how to prioritize our time. We make these difficult decisions based on our own interpretation of the financial and non-financial incentives as well as the consequences related to these decisions. Individuals who live and work in the communities we seek to engage are no different. The question is, with all this going on, how do teams raise their topic of interest to the top of communities' priority lists?

Teams' understanding and implementation of both financial and non-financial incentives boosts community participation, motivation, diversity, and retention. Financial compensation, such as gift cards or stipends, is one type of incentive. Non-financial reasons may also motivate partners to engage, such as accomplishing a shared goal, building relationships, developing skills, and receiving public recognition.

In this section, we outline steps to understand what incentives might look like in your work and build incentive best practices directly into your engagement activities to improve your outcomes.



Self - Reflection Questions

- What type of incentives have we used in the past, and what are our lessons learned?
- What assumptions are we making about incentives and how do we test and/or address these assumptions?
- Are the incentives we plan to provide aligned with the time, effort, and expertise that we are asking partners to contribute?
- How can we support our partners beyond financial compensation? (Consider ways you can support partners by advancing their organizations' mission, lending expertise to educational events, facilitating relationships, and more)

Implementing Incentives So People Show Up

Actions Items & Task Lists

Understand Incentives in Your Work

- Review the [Engagement Incentives Overview](#) to understand the vast range of potential incentives, including the potential impact on taxes and benefits.
- Connect with someone, such as a colleague or community partner, who has experience engaging the community you seek to engage to understand potential incentives.
- Explore and mitigate any consequences individuals may face if their personal information is collected and/or financial incentives are provided.

Build Incentive Best Practices into Your Policies and Procedures

- Identify resources for implementing financial and/or non-financial incentives, such as flexible funds, community partnerships, or local, state, federal, or philanthropic grants.
- Develop procedures to securely collect information of recipients receiving financial incentives, if provided, and to track receipt of these incentives.
- Dedicate a team member to implementing incentives procedures, including securely collecting information and tracking receipt of incentives.
- Include language in your outreach materials that makes the availability of financial and/or nonfinancial incentives clear.

Identify, Track, and Implement Incentives

- Discuss financial and non-financial incentives available to individuals as part of their orientation to your process; confirm and document their interest for appropriate follow-up.
- Create a tracking system, such as a table or excel sheet, to document the delivery of financial incentives, including the recipient identifier, date of request, date of receipt, and form of incentive received.
- Routinely assess individuals' uptake of incentives and modify your incentives to meet the needs of the communities you engage.

Implementing Incentives So People Show Up Measures of Success

You have explored, with colleagues and community partners, a list of financial and non-financial incentives that support community participation in your activities.

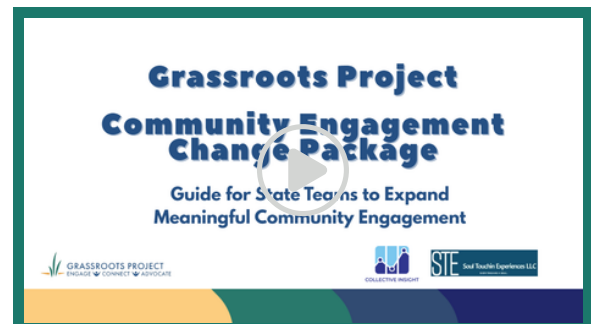
You have created procedures to mitigate any community risk in sharing identifiable information and/or accessing financial incentives.

You have shared information on the financial and/or non-financial incentives individuals can receive for investing their time in your activities, such as through flyers, guidebooks, and orientation meetings.

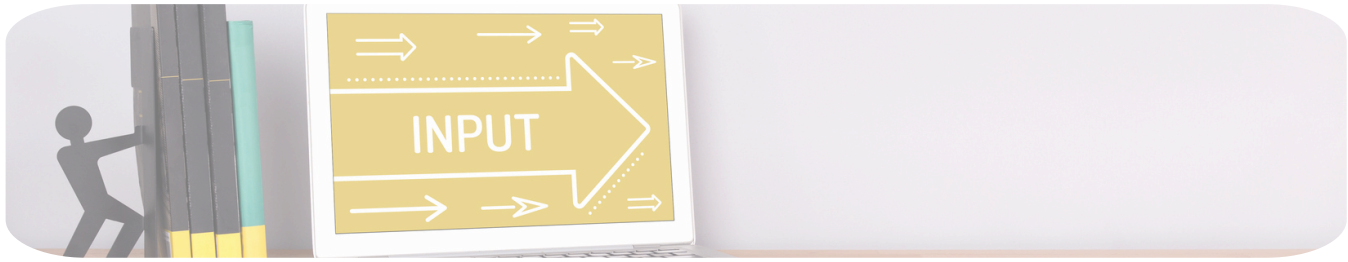
Individuals are accessing financial and/or non-financial incentives as a result of their participation in your activities.

Tools and Resources to Support Success

- Appendix F: [Engagement Incentives Overview](#)
- Link: [When Researchers Build Trust, “Hard-to-Reach” Undocumented Communities Aren’t So Hard to Reach](#)



Chapter 3.2: Financial and Non-Financial Incentives



Creating Tools to Track and Implement Input So People Come Back

Engagement keeps us busy- so busy that we often don't grasp how much we have learned, how productive we have been, or the outcomes that resulted. Because of this, it is important to document the work we have done in real time so we can report back to the communities we engage, as well as our colleagues, executive leadership, and funders. There are many simple ways to track engagement activities to minimize administrative burden while also supporting effective impact reporting and trust building with communities.

In this section, we outline steps and helpful tools to document your engagement process, participant experience, and impact. We also provide steps for implementing systems that encourage follow-up with those you engage to demonstrate that their participation was meaningful and impactful.

Self - Reflection Questions

- Do our guiding documents have enough information for potential partners to make informed decisions about joining our process?
- Do we currently document community input received and dedicate time with team members to reflect on what we have heard? If so, what are the strategies and tools we use to do this?
- How do we currently apply what we have heard from partners into organizational documents, policies, programs, or practices? If we do this well already, are we effectively communicating this impact to the communities engaged and the broader public?
- Are there times where we have missed these steps, and in doing so, caused conflict or mistrust with the communities we serve? What could we have done differently?

Creating Tools to Track and Implement Input So People Come Back

Actions Items & Task Lists

Develop Tools to Guide Your Engagement

- Review what you learned during your reflection process and asset mapping to inform the creation of initial guiding documents, such as a charter or by-laws, to outline your initiative's purpose and goals; meeting frequency and methods; required participants' time investment for success; and procedures for delivering accommodations and incentives.
- Host additional meetings with colleagues and community leaders to seek input and revise these initial guiding documents so they can serve as the foundation of initial community outreach.
- Review these initial documents with broader communities you seek to engage (e.g., during community meetings or new advisory councils) and modify them to account for the guidance you receive.

Develop Tools to Document, Track, and Share Input

- Develop a template for standardized meeting notes; ensure this template captures attendance, housekeeping topics, resources shared, and next steps as well as documents all discussions and input in thematic bullets that can be easily applied to future work.
- Develop a tool for tracking all the input you receive during and between meetings, such as a Word or Excel table, that captures the date input was provided, point made, input source, potential next steps, and status of application.
- Develop a resource hub for sharing guiding documents, meeting notes, and other helpful resources with partners, such as a Google Drive or website; ensure these resources are also accessible to those who do not use these electronic tools, for instance, by mail.

Engagement Tip

Remember meeting notes are not meeting minutes. Notes focus on themes and typically do not call out specific individuals. Visit our [thematic note-taking checklist](#) for tips on developing effective meeting notes.

Creating Tools to Track and Implement Input So People Come Back

Actions Items & Task Lists

Implement a System for Regular Updates and Check Ins

- Assign a point person for documenting and tracking input received and work with this person to ensure meeting agendas, products designed, and implementation of next steps consistently reflect input received.
- Embed time in your workplan for regularly updating tracking tools with input received; uploading new and revised materials on resource hubs; and applying input received to guiding documents and products designed.
- Schedule regular team check ins to review input tracking tools and monitor progress and dedicate time during partner meetings to review previous next steps and how input has influenced thinking and actions.



Engagement Tip

It is critical to identify next steps for all input shared during engagement. Remember: not every next step will be a literal interpretation of the input- sometimes, the best next step may be budgeting time for further discussion to identify a solution aligned with your shared goals, limitations, and assets.

Your tracking tools will make it easy to keep up with all input, identify next steps, and communicate how it informed change.

Creating Tools to Track and Implement Input So People Come Back

Measures of Success

✓ You have drafted a guiding document, such as a charter, that reflects your initiative's purpose, goals, meeting frequency and method for meeting, required time investment, and procedures for delivering accommodations and incentives.

✓ Your guiding documents have been co-created with or reviewed by community partners and revised based on their input.

✓ You have developed and started to fill out easy-to-use tools for documenting input, themes, and next steps from engagement to demonstrate progress between meetings.

Tools and Resources to Support Success

- Appendix G: [Sample Guiding Document](#)
- Appendix H: [Thematic Notetaking Checklist](#)
- Appendix I: [Meeting Notes Template](#)
- Appendix J: [Next Steps Tracking Template](#)



Chapter 3.3 Video: Thematic Notetaking

CHAPTER FOUR

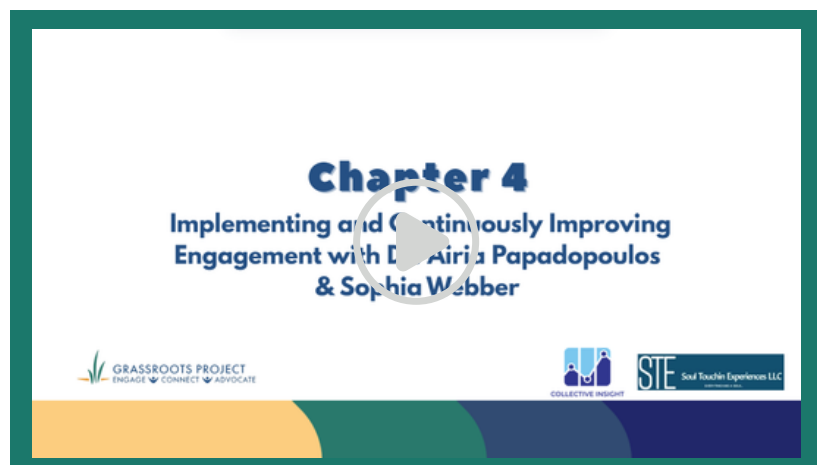
Implementing and Continuously Improving Engagement

Overview

If you are here, congratulations! This means you have already done a great deal of the work to make community engagement successful. You have thoughtfully reflected on your assumptions and learned from your colleagues; conducted research on the communities you seek to engage; mapped existing community assets and spoken to community leaders to guide your initial engagement design; and conducted accessible outreach while clearly articulating communities' benefits for investing their time. Now it is time to implement meetings that work for everyone, advance learning, and build community trust. Below, we review important steps to implementing and continuously improving engagement, including steps to facilitating effective meetings, evaluating and improving your process, and closing the loop on progress while celebrating wins.

Secondary Drivers

- Facilitating Effective Engagement Meetings
- Measuring Engagement
- Closing the Loop and Celebrating Success



Chapter 4 Video: Implementing & Continuously Improving Engagement with Dr. Airia Papadopoulos

Facilitating Effective Engagement Meetings

One essential ingredient to meaningful and inclusive engagement is effective meeting facilitation. Meeting facilitation is, on the surface, about keeping meetings on track. But, when done well, meeting facilitation can catapult the trust building process by demonstrating your desire to make space for all voices while also supporting groups to identify and act upon their common goals. When facilitators are genuine, flexible, and responsive, partners feel more comfortable speaking up and more confident that their input matters. Strong facilitation also helps turn meetings into collaboration spaces where lived experience is valued as expertise and real learning, across multiple types of expertise, happens.

Effective facilitation begins well before the meeting and continues long after it ends. It requires thoughtful planning to ensure accessibility and partner readiness in advance, active listening and respect for diverse perspectives during the meeting, and clear follow-up that affirms partners were heard and made a meaningful impact.

In this section, we outline steps to approach each phase, beginning with preparing before meetings, thoughtfully facilitating during meetings. And documenting and following up after meetings.

Self - Reflection Questions

- How do I support partners to feel prepared, welcomed, and supported before, during, and after our meetings?
- Am I typically comfortable with silence? How can I practice slowing down, being present, and feeling secure in quiet spaces?
- How can I demonstrate that I take community input seriously, especially when some people are coming to my process with previous experiences that left them feeling unheard or distrustful of an engagement process?
- How do I respond (or should I respond) when meetings go off track or when conflict arises?

Engagement Tip

Thoughtful preparation for meetings, active listening during meetings, and clear follow-up after meetings all contribute to feelings of respect and trustworthiness among you and members, regardless of differences.

Facilitating Effective Engagement Meetings

Actions Items & Task Lists

Before Meetings: Prepare

- Work with community partners to create initial materials that set clear expectations and clarify roles for all involved, such as a meeting charter and meetings guidelines.
- Provide a 'go to' person to build trust with partners before meetings even begin. This person can host one-on-one meetings with partners to share knowledge about the process and to learn partners' goals and needs to inform facilitation.
- Send materials, such as agendas and slide decks, in advance. Use accessible formats that meet your partners' accommodation needs.
- Ensure meeting spaces, whether they are virtual or in-person, are responsive to partners' accommodation needs.
- When possible, assign supportive roles like timekeeper and notetaker, so the facilitator can focus on facilitation. When hosting virtual meetings, also consider assigning people to provide technology support and monitor chat.

Engagement Tip

While it may not be possible at first, it is helpful to work with partners to identify a trusted member of the group who can help plan meeting agendas and co-facilitate meetings.

Actions Items & Task Lists

During Meetings: Facilitate Thoughtfully

- Use simple icebreakers to help everyone transition from their busy schedule to the meeting, get to know each other, and build community.
- Practice active listening^[2] by staying present, listening closely to all input, repeating back what you heard, and asking clarifying questions.
- Provide partners more than one way to engage. Consider using flip charts, break out discussions, polls, emoji reactions, and chat during meetings and engage through phone calls and emails before and after meetings.
- Talk plainly. This means avoiding jargon and acronyms whenever possible. When a group agrees to use an acronym, make sure it is clearly and frequently defined. Also, discuss this commitment during the meeting and welcome partners to hold you and others accountable during group discussions.
- Slow down and be ok with silence. Partners will process information at different speeds. Give people space to ask clarifying questions after you share information and to think before they answer your questions.
- Stick to your agenda so people know what to expect and no topic gets left behind. If you often go over the scheduled time or must skip topics, revisit your agenda layout and consider reducing the number of topics discussed.
- Accept that conflict is a natural part of the process. In fact, conflict can indicate trust-building. That said, always expect fair and respectful conversations. Work with meeting partners to revisit meeting guidelines to navigate challenging discussions and consider placing topics into your "parking lot" or "garden" for further discussion, when needed.
- Solutions take time and reflection. Avoid spontaneous problem solving and instead ask clarifying questions and take thorough notes. Ensure diverging ideas or opinions are documented in your notes by theme, rather than by individual, to avoid alienating individuals. Analyze these themes for complementary points and shared values. Report on these areas of alignment to partners to demonstrate productivity and inform next steps.

[2] Active Listening, Civility Initiatives, Carnegie Mellon University (2025), <https://www.cmu.edu/student-affairs/civility/resources/active-listening.html>

Facilitating Effective Engagement Meetings

Actions Items & Task Lists

After Meetings: Document and Follow Up

- Organize meeting notes to summarize discussion, highlight key themes, document next steps and who is responsible for them.
- Share meeting notes within two weeks of the meetings. Remember to share them in an accessible format that aligns with your partners' accommodation needs, such as large print or printed copies.
- Evaluate your meetings so you can learn ways to improve them. For instance, ask partners to complete a survey to share their experiences and recommendations. Also, invite open feedback after each meeting via email and one-on-one discussions.
- Don't let these notes collect dust. Instead, pull recommendations shared, agreed upon next steps, and evaluation feedback into a tracking tool to help you remember this important information and track progress. Demonstrate you are listening by revisiting these items during partner meetings to demonstrate impact and build trust.
- Maintain momentum in between meetings by incentivizing participation. For instance, you can provide training opportunities on topics of partner interest, provide frequent updates on your work and how partners impacted this work, and confirm receipt of financial incentives, when provided.

Engagement Tip

Not everyone has the resources to assign a timekeeper or note taker. In these circumstances, set your own timer, ask a meeting partner to keep time, and ask permission to record the meeting (while being clear how that recording will be used).

Facilitating Effective Engagement Meetings

Measures of Success

Your meeting ends on time, but you also had plenty of time for partners to talk in depth about one or two topics.

Partners consistently show up from one meeting to the next, and when they don't, you know why because you have had conversations with them.

You share meeting notes within two weeks of the meeting that plainly describe the information shared, discussions had, and the range of points made (categorized by theme, not by person).

Partners report, through survey, email, and/or informal discussions, that they were clear on meeting purpose, they felt prepared, the meeting was accessible, and they had opportunity to actively participate.

Tools and Resources to Support Success

- Link: [Tips for Effective Community Engagement Meetings](#)
- Link: [Carnegie Mellon Active Listening Resource](#)
- Link: [CI Newsletter: Conflict as a Good Problem](#)
- Appendix K: [Sample Meeting Guidelines](#)
- Appendix L: [Sample Meeting Agenda](#)

Measuring Engagement

Engagement is a continuous learning process for you and the individuals you engage, so it is important to start evaluating your engagement work from day one. Evaluating engagement helps you identify and address common challenges, like decreasing participation, increased conflict, or lack of discourse, before they become major obstacles that lead to community distrust. In this section, we provide steps to support your evaluation, including steps to identifying what to measure; deciding when and how to measure; choosing accessible, efficient tools to measure; and analyzing data you collect to apply what you learn.

Self - Reflection Questions

- What do we want to learn about engagement?
How do we get this information?
- Do our evaluation methods support the anonymity and safety of those providing input?
- How do we act upon what we learn? How do we let our partners know we are acting upon this learning?
- Are we really listening to our evaluation data, or are we simply applying what we agree with?



Engagement Tip

It is important to measure engagement **process, experience,** and **impact** to ensure you capture a hollistic picture of your engagement and can make meaningful improvements.

Measuring Engagement

Actions Items & Task Lists



Identify What to Measure

- Identify engagement **process** concepts to measure, such as providing timely meeting materials, accommodations, and incentives and using collaborative facilitation and decision making strategies.
- Identify engagement **experience** concepts to measure, such as progress towards meeting participants' goals and preferences, satisfaction with accommodations, and whether participants felt they were active in meetings and valued by you and peers.
- Identify engagement **impact** concepts to measure, such as success identifying issues, developing solutions, expanding outreach, expanding access, and improving social connectedness.

Engagement Tip

Consider multiple sources of data to gain a complete picture of your engagement challenges and successes, including observation, surveys, informal discussions, meeting notes, chat transcripts, and attendance lists

Measuring Engagement

Actions Items & Task Lists

Decide When and How Often to Measure

- Identify times to measure the elements you identified. For instance, you may measure elements before starting the engagement process, as well during the process and after it ends.
- For each area you want to evaluate, decide how frequently you need to evaluate the topic to best inform your growth. For instance, you may evaluate process and experience concepts after each meeting and evaluate impact at quarterly intervals.
- Assess trends in your engagement, such as declining attendance or lack of discourse, to determine if evaluation topics and/or timeframes needs to be modified to collect urgent information.
- Consider evaluating engagement even after it ends (or during breaks) to understand participants' long-term reflections and the engagement impact.

Choose Accessible, Efficient Measurement Tools

- Once you have identified what you want to collect, identify the best sources for this information; this may be surveys, interviews, written materials, or spreadsheets (most likely a combination of each).
- Ask around. You may already be collecting data that would be helpful to evaluation; you may also know people who have tools that you can easily modify and adopt.
- Don't underestimate the benefits of meeting notes as evaluation tool; use meeting notes to document attendance, discussions, decisions made, and impact of the process.
- Leverage survey tools with built-in analysis and reporting features, when possible, like SurveyMonkey or Google Forms, that allow you to export raw data or even do the analysis on your behalf.

Measuring Engagement

Actions Items & Task Lists

Analyze Data and Apply Learnings

- Appoint individual(s) to consistently update tracking tools with topics you evaluate, such as meeting attendance, participant experience, topics discussed, decisions made, and engagement lessons learned, so this data is easy to locate, learn from, and act upon.
- Report your evaluation findings to partners regularly. For instance, consider dedicating time in your agenda to reviewing findings as well as sharing findings in meeting notes and other communications, as appropriate. Be sure to also share how your engagement changes based on evaluation findings.
- Work with partners to co-design solutions for challenges identified during evaluations. For instance, if partners do not feel there is enough time for discussion during meetings, work together to update meeting frequency and agendas to address this challenge within your limitations.

Engagement Tip

Be conscientious of expectations around anonymity when broadly sharing input from one-on-one discussions or post-meetings surveys. For instance, it may be appropriate to share general take aways from survey feedback rather than direct quotes



Measuring Engagement

Measures of Success

✓ You have identified topics for evaluation, and they include topics relevant to the engagement process, participants' experience, and the impact of your engagement.

✓ You have identified at least one way to collect the information needed to better understand the evaluation topic.

✓ You are collecting and analyzing the data you identified at a frequency that can help you make changes to improve your work.

✓ Partners know how their input has expanded your learning and informed changes to your process.

Tools and Resources to Support Success

- Appendix M: [Sample Post-Meeting Survey](#)
- Link: [Collective Insight Summer 2023 Newsletter: Listen to Your Data](#)

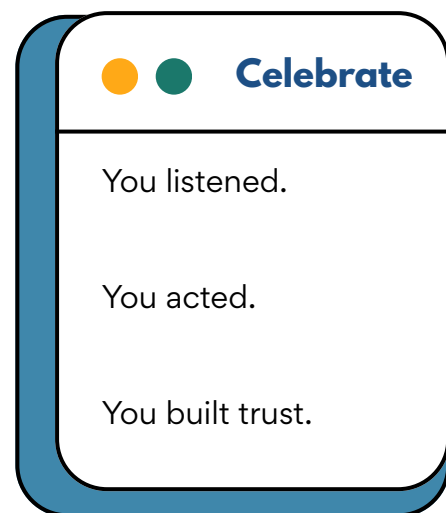
Closing the Loop and Celebrating Success

We are often so busy that we rush into action, never looking back, assuming that is the best way to demonstrate good stewardship of public programs and resources. Closing the loop and celebrating success with the individuals we engage, while often overlooked due to competing commitments, is a critical step to trust building and the overall success of any engagement process. By “closing the loop,” we simply mean taking the time to directly talk with those you engage to confirm what you learned and to share how this new learning influenced your work and the work of others. Celebrating successes provides an opportunity to be genuine, show appreciation, and document impact that may have otherwise gone unnoticed. For instance, consider hosting an event highlighting your shared goals, the steps you took to meet those goals, and the challenges and successes experienced along the way. These are all important steps for demonstrating people are valued and for leaving a positive last impression- setting the stage for your next engagement opportunity.

In this section, we provide steps for ensuring you set aside the time needed to effectively close the loop and celebrate success so partners feel valued, word gets out on how impactful engagement truly is, and buy in to this process continues to increase.

Self - Reflection Questions

- What might partners say if asked whether their voices made a difference? Have we been able to communicate this difference to broader communities?
- Have we taken time to recognize community members for their contributions? Have we been able to publicly highlight specific ways community input led to positive outcomes or changes?
- Have we shared our key takeaways with communities impacted by our work in ways that are accessible and reflective of their needs?



Closing the Loop and Celebrating Success

Actions Items & Task Lists

Consistently Close the Loop with Your Partners

- Rely on your follow up processes, discussed in the [Facilitating Effective Engagement Meeting Section](#), to help you close the loop throughout your engagement. Sharing notes consistently, revisiting progress during meetings, and connecting with partners one-on-one, helps ensure partners understand and validate how their input is used.
- Set aside time for effectively closing an engagement process, such as hosting a live discussion about experiences, achievements, and future aspirations. [Consider administering an evaluation](#), such as an end-of-process survey, to collect additional data about your process. Document what you learn to inform future engagement.
- Give credit by including partners as co-authors, co-presenters, and recognizing their input whenever possible.
- Consider how certificates of appreciation, gift cards, and other incentives can demonstrate your gratitude for partners' input and the successes of your engagement.
- Consider ways to keep partners connected, such as through an email listserv or social media page.

Share Your Progress Widely and Celebrate Success

- Use plain language to report back to partners, leaders, and funders on what was learned and what changed as a result through notes, newsletters, and meetings.
- Share key findings and outcomes with the broader community, such as through social media, a webpage, or a community forum. Work with partners to identify innovative and accessible mechanisms for sharing findings so communities can access and benefit from them.
- Publicly recognize what worked in your engagement process, such as through your social media, newsletters, website.

Close the Loop and Celebrating Success

Measures of Success



You have a meeting at the end of your work that provides you and your partners the opportunity to reflect on progress and celebrate success.



You have a meeting at the end of your work that provides you and your partners the opportunity to reflect on progress and celebrate success.



Journal articles, newsletters, social media, and/or other communication tools recognize the contributions community partners have made to your work.

Tools and Resources to Support Success

- Link: [Collective Insight Summer 2023 Newsletter: When Advisory Boards Come to an End](#)
- Link: [Collective Insight Winter 2023 Newsletter: Showing Gratitude in Engagement](#)

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Asset Mapping Checklist

Assess your Readiness

- Seek buy-in to the Asset Mapping process from leadership and partners
- Determine time, staff, and resources needed
- Commit to an inclusive and reflective process

Decide the Scope of Your Asset Map

- Clarify the goals of your asset mapping
- Identify who will be impacted by this process
- Envision what success looks like in 6-12 months

Prepare for Brainstorming Meetings

- Determine who will join you in this process
- Schedule and plan for meetings
- Prepare your questions and how to document discussions

Explore Strengths, Challenges, and Allies

- Identify the voices often found in your work and those commonly left out
- Identify current engagement activities, communication channels, and trusted leaders
- Discuss what is working and what is not in your outreach and engagement activities

Visualize What You Learn

- Organize similar ideas or themes into groups
- Use creative visuals, diagrams, and charts to display your information
- Fill in the gaps where you can through research and additional conversations

Validate and Refine Your Map

- Share the draft asset map with colleagues and community partners
- Learn if the map reflects their experiences, ask about others who should review
- Make changes accordingly

Use Your Map to Make Change!

- Share the map broadly to get feedback
- Revisit and update the map regularly Use what you
- learned to inform plans for engagement

Engagement Role & Responsibilities Guide

Use this guide to make sure engagement roles are clear, complete, and practical. It outlines the key responsibilities, such as accessibility coordination, incentive management, feedback tracking, and clear communication, that every engagement-supporting role should cover. As you write or update job descriptions, use this sheet as a checklist to set expectations, assign tasks, and strengthen your team's ability to effectively engage communities.

How to Use This Guide:

- Review when drafting or revising engagement-related job descriptions.
- Use as a checklist during onboarding.
- Refer to it during performance reviews to assess role clarity and follow-through.

Engagement Specialist Role- Sample Description:

The [Engagement Specialist] supports the design, implementation, and evaluation of community engagement activities. This role ensures that engagement is inclusive, accessible, and effective by coordinating logistics, managing incentives, tracking feedback, and fostering strong relationships between the organization and the communities it serves.

Responsibilities:

- Accessibility & Accommodations:** Ensures accommodations are identified and met.
- Incentive Management:** Coordinates financial and non-financial incentives; ensures tax and benefit considerations are addressed.
- Feedback Tracking:** Collects, tracks, and shares participant feedback; closes the loop with updates on how input is applied.
- Communication & Follow-through:** Maintains clear, plain language communication; follows up on next steps and report progress.
- Meeting Support:** Prepares agendas, sends materials in advance, manages logistics, and ensures meetings are inclusive and well-run.
- Relationship Building:** Fosters trust, respect, and collaboration across diverse community members.
- Documentation:** Maintains clear agreements or charters outlining roles, expectations, timelines, and decision-making processes.

Team Member Training Resource

This resource provides training opportunities to strengthen team members' skills in engagement, accessibility, cultural responsiveness, and compliance. It offers links to trusted, publicly available materials and networks that can supplement internal training efforts. Use this resource to connect team members with learning tools that build capacity, reinforce best practices, and support the ongoing growth needed for effective engagement.

How to Use This Resource:

- Review when developing annual training plans or professional development goals.
- Share with team members during onboarding or when roles change.
- Use to identify training that addresses current project needs or skill gaps.
- Update with new or improved resources as they become available.

Engagement & Community Partnerships

- **PCORI Engagement Resources:** Tools, training, and case studies on engaging patients and communities in research. <https://www.pcori.org/engagement>
- **Collective Insight Engagement Training & Support:** Training programs that break down community engagement into actionable steps. [Engagement Training and Support | Collective Insight](#)

Accessibility & Inclusion

- **ADA National Network:** Accessibility training and technical assistance for in-person and virtual events. <https://adata.org>
- **U.S. Equal Employment Opportunity Commission (EEOC):** Federal laws around discrimination including compliance guides, fact sheets, and training materials. www.eeoc.gov/employers

Plain Language & Clear Communication

- **CDC Clear Communication Index:** Toolkit and training for writing accessible, plain-language materials. <https://www.cdc.gov/ccindex/>
- **PlainLanguage.gov:** Federal guidelines and training on clear, accessible communication. <https://www.plainlanguage.gov/>

Organizational Culture Worksheet

This worksheet provides a series of questions to use on your own or with your team to aid in the essential reflection process prior to any engagement initiative. Working through the questions will help you understand your organizations history and culture, including your mission and how its aligned (or not aligned) with community engagement. These discussions can help improve self-awareness, humility, and transparency during the planning process and identify areas for further research and discussion to inform partnerships.

Questions for Assessing Your Organizational Culture:

1. What does culture mean to you?
2. Does your organization have a culture?
 - a. What is your organizational culture?
3. What is your organization's mission?
4. How does engagement fit within your organization's mission?
5. What brings you to the work you do?
 - a. How does that impact the communities you are trying to reach in your work?
6. What are challenges to community outreach within your organizational culture?
7. What are innovative solutions to community outreach within your organizational culture?

Engagement Accommodations Survey (Sample)

Basic Information

- Name
- Phone Number
- Email

Note: Always follow your organization's policies and procedures when collecting personal information from partners. Prioritize partner privacy by only collecting what is necessary for your goal and storing information securely

Accommodation Needs

Please describe your accommodation needs in the text box below.

Note: Accommodation needs can include a variety of supports, such as:

- Interpretation and translation services
- Large print or braille meeting materials
- Support logging onto Zoom Meetings
- Time of day and length of meeting adjustments
- Connecting between meetings to process topics together

Note: Working with your key partners early can help you tailor your accommodation planning and identification. For instance, if you know certain language services may be requested, consider also creating accommodation surveys in that language.

Not sure what accommodations might be most helpful to you? Contact XXX at XXX@XXX.com. We can work together to develop a support plan.

Need interpretation or translation services? Please list the language needed below:

Please provide any additional information you think would be helpful to address your accommodation request:

You can reach out to the XXX team to discuss accommodation needs at any time by emailing XXX@XXX.com.

Engagement Incentives Guide

This guide helps teams identify and select incentives that encourage participation, build trust, and recognize contributions. It outlines both financial and non-financial options, along with key considerations such as cultural relevance, sustainability, and potential impacts on taxes or benefits. Use this guide during planning to choose incentives that align with your engagement goals, meet participant needs and contributions, and avoid unintended risks.

How to Use This Guide:

- Review it early in the planning process for any engagement activity.
- Use it to compare incentive options and weigh potential benefits and risks.
- Share it with decision-makers to ensure incentives align with participant needs.
- Refer to it when finalizing budgets and communication materials for participants.

Incentive Types

- **Financial Incentives:** Gift cards, stipends, contracts, wages.
 - Considerations: Taxable income, benefits impact, payment method, required documentation.
- **Non-Financial Incentives:** Public recognition, skill-building, co-authorship, co-presenting, leadership opportunities, conference attendance, providing training or professional development, donating time/resources to causes that matter to partners.
 - Considerations: Relevance to participant interests, cultural value, sustainability.

Risks and Mitigation

- **Perceived Inequity:** Risk that participants may view incentives as unfair if amounts or types vary between participants or groups.
 - Establish clear criteria for eligibility, communicate the rationale for differences.
- **Unintended Impact on Benefits:** Financial incentives may affect participants' eligibility for public benefits or create unexpected tax liabilities.
 - Consult with tax and benefits professionals when designing incentives.
 - Inform participants about possible impacts.
 - Offer non-financial alternatives.
- **Administrative Burden:** Managing incentives can require significant time and resources for tracking, distribution, and compliance.
 - Simplify processes, use standardized tracking tools, and assign a dedicated staff person to oversee incentive administration.

Administrative Tips for Incentives

- **Assign a Point Person:** Designate staff responsible for managing incentive processes.
- **Define the Purpose:** Clearly state why the incentive is being offered.
- **Set Eligibility Criteria:** Establish and communicate who qualifies for the incentive.
- **Document Incentive Details:** State type, amount, and distribution process.
- **Budget:** Allocate funds for incentives and confirm sustainability for the project timeline.
- **Choose the Payment Method:** Select secure, accessible options (e.g., gift card, direct deposit)
- **Track Distribution:** Maintain accurate records of what was given, to whom, and when.
- **Consult Tax/Benefits Experts:** Understand local and federal tax and benefits implications when designing incentives.
- **Communicate Tax/Benefit Implications:** Inform participants of potential impacts before they accept incentives.
- **Review Compliance Requirements:** Ensure incentives meet organizational, legal, and funding guidelines.
- **Evaluate Effectiveness:** Assess whether incentives are meeting participation and engagement goals.

Engagement Charter (Template)

- **Purpose of the Engagement Structure**
- **Membership of the Engagement Structure**
 - Lenses represented in the structure (ie service users, caregivers, advocates, community organization representatives)
 - Size of the structure
- **Meeting Commitment and Frequency**
 - Frequency of meetings
 - Time commitment and workload expectations
 - Term limits or renewal process, if applicable
- **Meeting Focus Areas**
- **Meeting Approach**
 - Platform/location for meeting
 - Facilitation style and approach to co-leadership
 - Decision-Making Process
 - Meeting Guidelines (may hyperlink)
- **Meeting Orientation and Support**
 - Training and co-learning strategies
- **Meeting Materials**
 - Material types and commitment to sharing materials in accessible formats
- **Accommodation Requests**
 - Commitment to providing accommodations
 - Examples of accommodations
 - Contact information for requesting accommodations
- **Meeting Incentives**
 - Types of incentives, including financial incentives amount, if applicable
 - When and how incentives will be shared
 - Contact information for managing incentives

*This Chart is a living document. Please share additional ideas for this document with XXX.

Thematic Note-Taking Checklist

Thematic Notes:

- Capture themes from engagement discussions
- Identify action items that inform decision-making
- Record more than meeting minutes

Thematic Note Taking Checklist

- Prepare facilitation questions that simplify note taking (i.e., they should align with what you need to learn in the meeting)
- Assign a notetaker (if you cannot, then record the meeting. Be sure to get permission from the group before doing so)
- Ask open-ended questions that generate rich discussion and feedback
- Support detailed notes during the meeting by
 - Listening closely
 - Asking for clarifications
 - Keeping track of everything you hear, even if it seems repetitive or off topic
- Review raw notes with fresh eyes
- Organize your notes into “themes” or buckets that represent commonalities
- Tell the story of the meeting, focusing on major themes rather than exact chronology back-and-forth conversations
- Validate the notes with the group

Thematic Notes Example

Our Outreach Strategy

The group discussed outreach, including obstacles to successful outreach, lessons learned from previous outreach, and potential solutions and partnerships to make outreach work. Participants provided the following points:

Obstacles to effective engagement:

- Participants noted several ways technology may challenge engagement, such as:
 - Excluding people who don't have access to the internet or a device
 - Excluding people who don't have the technological literacy to effectively access the internet or their devices
 - Excluding people who can't or don't regularly check their emails
- Participants highlighted that outreach may fall flat for people because they don't feel like they are the right person to work with our organization. Eligible people may self-select out of outreach before they learn more.
- Participants noted that there may be a stigma attached to the image and reputation of our organization, which may create a barrier for people. We must tackle these issues such as:
 - The perception that our organization is difficult to reach by phone
 - The perception that our organization's website is difficult to navigate
 - Perception that there is a lot of red tape associated with working with us

Theme

Plain Language Overview

Sub-Theme

Bullet Points to Capture Group Feedback on Theme/Sub-Theme

Thematic Meeting Notes (Template)

Housekeeping (Topics repeated at the beginning of every meeting, such as meeting guidelines)

- Consider repeating regular sections at the top of all your meeting notes, such as attendance, meeting guidelines, and resources shared during the meeting
- Prioritize consistency and accessibility

Major Topics Discussed During the Meeting

- Provide a plain language overview of each topic and subtopic
- Use our [Thematic Note Taking Checklist](#) to organize feedback around themes rather than taking all feedback at face value
- Avoid using names, unless it's necessary for tracking next steps
- Use action oriented bullets or statements
- Highlight any next steps that emerge

Next Steps and Wrap Up

- Reiterate any next steps that emerge
- Highlight responsible parties and due dates, where appropriate
- Be sure to also track these steps in your [feedback tracking tool](#)

Engagement Structure Feedback Tracker (Template & Examples)

Theme/Topic	Feedback	Next Steps	Progress Updates
<p>Example: Meeting Guidelines</p> <p>(You had a discussion in the meeting about an existing set of Meeting Guidelines and asked the group what they liked and if anything was missing)</p>	<p>(What you heard in the meeting)</p> <ul style="list-style-type: none"> -Several suggestions to add a guideline about how we want to use “Chat” on Zoom during meetings -Most participants agree to avoid using acronyms and jargon -A few participants brought up how the guidelines don’t cover decision-making and wondering if this was something the guidelines should include 	<p>(What you will do to address what you heard)</p> <ul style="list-style-type: none"> -We will compile all ideas related to Meeting Guidelines and develop a first draft based on what we heard. -We will then re-share the guidelines with the group to validate that we heard them 	<p>(Internal tracking of next steps)</p> <ul style="list-style-type: none"> -3/15: compiled the meeting notes and saw three major themes for Meeting Guidelines updates: 1. Zoom etiquette, 2. Clear communication, and 3. Making decisions -3/27: developed first draft of Meeting Guidelines to reflect what we heard -4/7: shared with the team -4/15: met with the team to validate changes
<p>Example: Stipends</p>

Meeting Guidelines (Sample)

Engagement Structure Meeting Guidelines

- Provide the information and support needed for all to engage.
- Ensure space for all to contribute.
- Avoid jargon and acronyms (or spell them out first).
- Recognize all opinions matter and there are no right or wrong answers.
- Actively listen and limit outside distractions.
- Arrive on time and communicate about our attendance in advance, whenever possible.
- Turn our cameras on when possible to build community and respect the need to be off camera.
- Provide space for breaks and take breaks when needed.
- Work together to ensure meetings are accessible, respect each others access needs, and recognize that access needs are fluid.
- Share your thoughts while also leaving time for others' ideas.
- Adhere to meeting agendas and try to stay on topic.
- Protect everyone's personal information and shared experiences.

*Please share additional ideas for this document with XXX.

Engagement Structure Meeting Agenda (Checklist and Template)

Agenda Checklist

- Contains no more than 2-3 major topics
- Holds adequate time for discussion (i.e., 20-30 minutes per topic), including time for thinking and asking for clarification
- Plans for open-ended facilitation questions (i.e. questions that cannot be answered ‘yes’ or ‘no’)
- Reflects your partners’ priorities

Agenda Template

1. Welcome & Introductions
2. Major Topic 1 + Discussion
3. Major Topic 2 + Discussion
4. Wrap Up & Next Steps

Post-Meeting Survey (Template)

Please take a moment to answer the following questions. We will use your responses to improve our meeting process.

1. I understood the purpose of today's meeting.

- Agree
- Disagree
- Unsure

If you disagree or are unsure, please explain.

2. I had the materials I needed to prepare for today's meeting.

- Agree
- Disagree
- Unsure

If you disagree or are unsure, please explain.

3. I had the support and/or accommodations I needed to fully participate in this meeting.

- Agree
- Disagree
- Unsure

If you disagree or are unsure, please explain.



4. The meeting was well facilitated.

- Agree
- Disagree
- Unsure

If you disagree or are unsure, please explain.

5. The meeting moves at an accessible pace .

- Agree
- Disagree
- Unsure

If you disagree or are unsure, please explain.

6. I was an active participant in one or more of today's discussions.

- Agree
- Disagree
- Unsure

If you disagree or are unsure, please explain.

7. I believe meetings are a good use of my time.

- Agree
- Disagree
- Unsure

If you disagree or are unsure, please explain.



8. Please share anything else you would like us to know or to keep in mind as we prepare for meetings.

Thank you so much!

Your input helps us make meetings better. You may also reach out to the team to ask questions or discuss your ideas at any time. Simply email XXX@XXX.com

Informational Videos

This Toolkit includes short, informational videos, including interviews with experts, that dig deeper into topics such as the reflecting to inform engagement, building partnerships, and facilitating meetings. The videos are embedded throughout the Package and you can also find them linked below:



[Toolkit Introduction Video with Keith Jones & Sophia Webber](#)



[Chapter 1 Video: Reflecting and Preparing for Engagement with Dr. Erin McGaffigan](#)



[Chapter 2 Video: Building and Sustaining Partnerships with Keith Jones](#)



[Chapter 3.1 Video: Using Plain Language](#)

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This Toolkit includes short, informational videos, including interviews with experts, that dig deeper into topics such as the reflecting to inform engagement, building partnerships, and facilitating meetings. The videos are embedded throughout the Package and you can also find them linked below:



[Chapter 3.2 Video: Financial and Nonfinancial Incentives](#)



[Chapter 3.3 Video: Thematic Notetaking](#)



[Chapter 4 Video: Implementing & Continuously Improving Engagement with Dr. Airia Papadopoulos](#)