

## Engagement Plan Worksheet

Page 1 of 5

This worksheet is intended to serve as a starting point in the development of an engagement plan. It is designed to provide a framework for you to increase your ability to:

- Inform citizens and stakeholders about your project and/or goals
- Gather input from citizens and stakeholders regarding their opinions and support for, and assessment of, various actions, goals, and priorities,
- Help you better understand and consider citizens and stakeholders concerns, aspirations and ideas for addressing your specific need
- Assist you in identifying alternatives, consequences and preferred solutions
- Help you identify stakeholders groups, leaders and citizens that can guide decision-making and contribute to implementation or contributing to solutions

This worksheet is adapted from “Developing Effective Citizen Engagement: a How-To Guide for Community Leaders”, Center for Rural Pennsylvania, 2008. Available at: [www.rural.palegislature.us](http://www.rural.palegislature.us)

### **STEP 1—*Define your issue***

What is the specific problem, goal or issue you want to address? - Frame the problem as an issue around which the community can discuss alternatives, solutions, and consequences. Examples: enhancing youth opportunities (rather than youth curfews), retail development strategies (rather than the proposed “big-box” store), waste management options (rather than simply the proposed landfill).

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**STEP 2—What are your engagement goals**—Why do you need or want people to get involved in your project? What do you want to accomplish by getting people involved? In many cases, you are likely to want to consider a mix of goals.

Some questions to consider when developing your goals include:

- **Inform**—Do you want to inform people about a project, or help them understand a problem or opportunity? Do you need more information from citizens to make a decision?
- **Consult**—Do you want to get public feedback about a project, program or decision? Do you want to stimulate public debate about the issue?
- **Involve**—Do you want to work directly with citizens throughout the decision-making process, drawing on their knowledge and expertise to make recommendations?
- **Collaborate**—Do you want to create long-term partnerships among stakeholders (participants and community groups) that will implement the solutions they create?
- **Empower**—Do you want the public to take leadership for implementing actions that address the purpose?

1. Inform. What are the key things you want stakeholders to understand? What do they need to know to make this effort successful? What information is missing? Be as specific and comprehensive as possible. \_\_\_\_\_  
\_\_\_\_\_

2. Consult. What specific types of information do you want from your participants? Is it simply input into a pre-developed proposal or is it general perceptions and values related to the issue(s) you are seeking to address? Be specific. \_\_\_\_\_  
\_\_\_\_\_

3. Involve. If you are expecting stakeholders to help make decisions, what specifically do they have purview over? How will their input be incorporated into the process or outcomes? How will you describe the your engagement's intentions in this regard? \_\_\_\_\_  
\_\_\_\_\_

4. Collaborate. What specific contributions and partnerships do you want from your stakeholders? What can they realistically contribute? What authority are you willing to relinquish if necessary? \_\_\_\_\_  
\_\_\_\_\_

5. Empower. What specifically do you expect stakeholders to do on their own? \_\_\_\_\_

## Engagement Plan Worksheet

**STEP 3—Develop Your Engagement Team**—At this stage it is a good idea to develop a project team or task force to plan and implement your engagement process. This team would have the following responsibilities:

- Selecting tools and designing the process for citizen participation
- Identifying and recruiting participants
- Publicizing the effort
- Developing background information
- Designing benchmarks and criteria for evaluation
- Reporting the outcomes of the process
- Making recommendations based on the outcomes

List potential engagement team members. This team should represent a diverse group of citizens and organizations – the same types of people that you would like to see participating in the process.

• _____	• _____
• _____	• _____
• _____	• _____
• _____	• _____
• _____	• _____
• _____	• _____
• _____	• _____
• _____	• _____

## Engagement Plan Worksheet

Page 4 of 5

### STEP 4a—Identity *face to face* tools for engaging citizens and stakeholders.

There are a number of face-to-face tools and processes that can be used to engage citizens and stakeholders in your efforts. These tools serve to achieve different engagement goals: Inform, Consult, Involve, Collaborate or Empower. The trick is to select the engagement tool(s) and processes that match your goals and capacity to implement the appropriate strategies. A few of the more commonly used processes are identified here—you may use one or more of the following or utilize additional tools available to you.

<p><b>To Inform</b></p> <p>Key Contact Interviews</p> <p>Surveys</p> <p>Public Hearings</p> <p>_____</p> <p>_____</p>	<p><b>To Collaborate</b></p> <p>Study Circles</p> <p>Community Task Forces</p> <p>IT Tools (websites, discussion boards, list serves, bulletin boards, video-teleconferencing)</p> <p>_____</p>
<p><b>To Consult</b></p> <p>Nominal Group Process</p> <p>Roundtable Discussions</p> <p>Focus Groups</p> <p>Delphi Technique</p> <p>_____</p>	<p><b>To Empower</b></p>
<p><b>Involve</b></p> <p>Public Issues Forums</p> <p>Citizens Panels</p> <p>Charrettes</p> <p>_____</p> <p>_____</p>	

## Engagement Plan Worksheet

### STEP 4b—Identity *digital or other communication tools* for engaging citizens and stakeholders.

There are a number of digital and other tools that can be used to engage citizens and stakeholders in your project. These approaches serve to achieve different engagement goals: Inform, Consult, Engage, Collaborate or Empower. The trick is to select the engagement tool(s) and processes that match your goals and capacity to implement the appropriate strategies. A few of the more commonly used processes are identified here—you may use one or more of the following or utilize additional tools available to you.

<p><b>To Inform</b></p> <p>Print media Direct mail Email blasts Website eNewsletter Mapping tools Media sharing sites Webcasts Listservs</p> <hr/>	<p><b>To Collaborate</b></p> <p>Interactive Websites Discussion boards Listservs Bulletin boards Web and video conferencing Doodle</p> <hr/>
<p><b>To Consult</b></p> <p>Website Social media Surveys Webcast and discussion</p> <hr/>	<p><b>To Empower</b></p> <p>Interactive Websites Discussion boards Listservs Bulletin boards Web and video conferencing Doodle</p>
<p><b>To Engage</b></p> <p>Crowdsourcing (SurveyMonkey, Quora, Moderated Blogs, Ushahidi) Structured online deliberation (Google docs, SharePoint, Webex, Skype, Twitter Chat)</p> <hr/> <hr/>	

## **Engagement Plan Worksheet**

Page 6 of 5

**STEP 5—Identify your Target Audience/Stakeholders—individuals and groups that need to be involved, will be influenced by or who can be influence the outcomes and success of your project**

**STEP 6—Participant Recruitment and Retention Plan— how will you reach, prepare for, and communicate with your target audience**

**STEP 7—Create a Positive Environment for Citizen and Stakeholder Engagement—what information, processes, or accommodations do you need to plan for to make this a welcoming and effective effort?**

**STEP 8—Identify Evaluation Criteria—how will you measure if you've been successful? What constitutes success for both the project team and participants? What do you need to do carry-out this evaluation?**

**STEP 9—Maintain Open Lines of Communication—what is your plan for on-going communication and sustaining involvement? What are your participants expecting?**