Equitable Community Planning Toolkit

Workbook 2

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Identify and Engage Community Members

Overview

Deploy Inclusive Planning and Engagement

Community planning has the potential to improve or worsen social and economic inequities for individuals, particularly those who have been historically marginalized. To improve inequities, planners must prioritize inclusive engagement. By seeking full representation of community members across a spectrum of interests, ages, and socio-economic backgrounds, communities are more likely to achieve:

More Informed Plans and Better Outcomes: Plans that are developed with inclusive representation are better informed and have a higher potential for positive impact for all community members.

Creativity and Collaboration: Listening and learning from a variety of voices rather than engaging only like-minded representatives spurs creativity and a more honest assessment within the planning process.

Improved Buy-In and Participation: Early engagement creates greater understanding amongst the public during strategy development, and thus improves buy-in and participation during implementation.

This workbook includes information to **Identify Partners and Community Members You Need to Engage**, **Understand Partner Roles**, and **Engage Partners and the Broader Community**.

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Workbook 2 Activities

Workbook activities include guiding questions that are designed to help you and your partners brainstorm about equity within your systems. Use these activities during an internal or community planning session and send questions to colleagues or partners to aid their thinking on the creation and implementation of a program or partnership idea.

The exercises across these activities aren't meant to be an exhaustive list of things to consider as you are planning. Instead, they are a helpful guide to centering equity within community planning and strategy work.

2.1 Identify Partners and Community Members You Need to Engage

Brainstorm the partners in your ecosystem and who in your community needs to be engaged to contribute to the goals you identified in Step 1 of the Equitable Community Planning Workbook series.
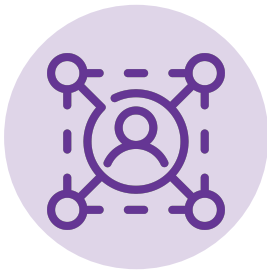
2.2 Understand Partner Roles

Think about and document how these partners currently function in the ecosystem, and how they can work together to:
- develop a more informed plan with strong outcomes;
- enhance creativity and collaboration; and
- increase likelihood of success through improved buy-In and participation.

2.3 Engage Partners and the Broader Community

Engage partners and community members to review and refine baseline findings from Step 1 of planning, including reprioritization of problems to address and updating goals to achieve.

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Ecosystem Partners

These are common players in community ecosystems. Roles are not mutually exclusive - some of your partners may be playing many roles.

Advocates

Community leaders and organizations directly engaging with those who are in need. Residents and activists inform decision makers of the issues at hand and the resources needed, amplifying community concerns.

Supporters

Private actors, such as businesses and corporations that hold immense political and economic clout can tip the scale on action around community issues with their support.

Conveners

Individuals and organizations specializing in partnership, bridging the gap between private and public actors, and ensuring residents are engaged and heard.

Activators

Funders, such as philanthropic partners, support innovation and community progress.

Aligners

From small think tanks to universities, research partners ensure policies and strategies are well-aligned to the needs of the community. They uncover truths about the realities of a community's lived experience.

Enablers

Policy makers and local government agencies often enable action and intervention, especially with systemic issues. Elected officials can either be the catalysts or bottlenecks toward achieving equity.

credit: sonnycool, vecteezy.com

Broad Community Engagement

Community engagement consists of the following three core actions: listening and learning, cultivating understanding, and motivating action. As you plan, you will need to identify **who** in your community you need to engage and **how** you will reach them.

Who?

To ensure inclusive community engagement, confirm representation across demographics, geographic locations, and target populations.

How?

To ensure effective engagement, utilize a variety of channels to reach community members. Below are categories and attributes that can help you with this process.

Target Populations

- Women
- LGBTQIA+ communities
- Immigrants
- People with Disabilities
- Communities of Color, often African Americans and Latinx
- Indigenous populations
- Veterans
- Low-Income Individuals and Families

Methods of Outreach

Events	• In-person or virtual events hosted initiated by your organization • Tabling or presenting at pre-existing community events
Print	• Local newspapers and magazines
Digital	• Websites and blogs of municipalities and community organizations • Newsletters and email distribution lists of municipalities, community organizations, and schools • Social media accounts of community members and local organizations
Place-based	• Community and public bulletin boards • Billboards, marquees, and road signs
Other	• Informal, day-to-day conversations • Radio • Surveys

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Addressing Tough Topics

Addressing ongoing inequity requires regular discussions. Such discussions may be uncomfortable. However, progress can only be made by directly addressing tough topics.

Building Trust by Addressing Community Concerns

The Institute of Local Government offers a guide for addressing "Deeply Held Concerns" in communities. The guide stresses preparation ahead of community engagement on tough topics. Recommendations include meeting with groups that hold deep concerns ahead of time, providing background information and data ahead of discussion, and framing the purpose of the discussion.

Practitioners engaging in equity work should be prepared to address doubt and engage in tough discussions.

Conflict and Communication

Value clashes are not the only potential sources of conflict in public engagement. Other potential sources cited by Penn State's Center for Economic and Community Development include faulty or inconsistent communication, competition for resources, comfort with change, poorly defined responsibilities or authority, needs for recognition, power differentials, or unresolved prior conflicts.

Engagement in Practice

Good engagement is founded in trust. Trust is established by listening and incorporating community feedback throughout the planning process. For instance, pairing qualitative engagement finding from interviews or focus groups with quantitative data creates a more comprehensive view of a place or organization. Economic development engagement must balance being steadfast enough to maintain core values and goals and being agile enough to adapt to the needs of unique communities.

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We're here to help and be a partner in this work!

Need assistance? Have success stories or additional resources to share?

Please email us at **engage@fourtheconomy.com** with questions or suggestions as your community completes the equitable planning workbooks.

Identify Partner Roles

Brainstorm the partners, entities, and organizations that hold key roles within your equity ecosystem.

Hint: Refer back to the **Ecosystem Partners** page and **Broad Community Engagement** page to ensure you're including partners according to theme, and not leaving out any major perspectives.

Who are the key partners within your equity ecosystem?		
Advocates	**Conveners**	**Aligners**
Supporters	**Activators**	**Enablers**

Understand Partner Roles

Brainstorm how the partners you identified in the last step are or could contribute to the goals you identified in Step 1 of the Equitable Community Planning Workbook series.

Note: You may need to repeat this exercise multiple times. For example, you may want to repeat this page for each goal identified in Workbook 1 and/or for the different types of partners from the previous page.

Consider how these partners reflect the current community and the one it hopes to become.
Who are the community members the partners within this system seek to strengthen?
How do these partners communicate and interact with the community?
How do these partners currently work together around issues of equity?

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Engage Partners and Community Members

Once you're done with the previous step, engage partners and community members to review and refine baseline findings from Step 1 of planning, including reprioritization of problems to address and updates goals to achieve. Create and enforce ground rules to guide conversations that may be difficult.

Collect feedback from your engagement and answer the following questions.
How did your engagement with partners and community change your understanding of the problems you identified in Step 1 of the Equitable Community Planning process? How did it change your prioritization of which problems to solve, if at all?
How did your engagement with partners and community change the planning goals you identified in Step 1 of the Equitable Community Planning process?

Resources: Example **Ground Rules** from Catalyst, a global nonprofit of CEOs and leading companies to help build workplaces that work for women. Feel free to use these as a guide to create your own.

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Pause and Reflect

In this workbook you have identified and engaged with partners and community members to ensure adequate representation of the problem from those with lived experience. As you continue, consider the following questions:

How does your engagement with the community and understanding of its issues inspire a more community-centered planning and decision-making process?

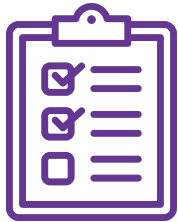*How will you give greater voice and power to affected communities beyond just engagement on issues?*

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Congratulations!

You've completed the activities in Workbook 2

Next Up

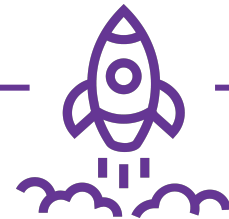## Workbook 3: Identify, Evaluate, and Implement the Methods

Evaluate Promising Practices

Build Consensus and Strategies

Move Towards Action

Keep In Mind: Equity work is an ongoing process. Planning and implementing change is iterative and will likely need to be refined and updated as you progress through the framework and engage community members.