



**About this Resource**

Impactful community health initiatives are grounded in meaningful, equitable, and effective engagement. This template is a resource for government and/or community-based organizations to develop a clear and thoughtful engagement approach as they work to promote and plan for active living and healthy eating in Ohio communities. It is a working document meant to provide a structured starting point for engagement and can be modified to suit the needs of individual strategies.

Before you begin to implement your strategy complete this document to outline your engagement plan. It includes:

Instructions for how to use each section are shown in *red italics*. Delete these pieces before publishing your draft to share.

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Strategy Basics (page 3). Goals (page 4).

People (page 6).

Context (page 8).

Plan (page 10).

Additional resources provide more detailed information about specific engagement and communications strategies and can be used to help make decisions about the most appropriate choices for your project. These include:

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[ChangeLab Solutions – The Planner’s](https://www.changelabsolutions.org/product/planners-playbook)

[Playbook.](https://www.changelabsolutions.org/product/planners-playbook)

[American Planning Association – Inclusive](https://www.planning.org/planning/2018/feb/inclusivemobility/)

[Mobility.](https://www.planning.org/planning/2018/feb/inclusivemobility/)

[Center for Wellness and Nutrition –](https://centerforwellnessandnutrition.org/community-engagement-toolkit/)

[Community Engagement Toolkit.](https://centerforwellnessandnutrition.org/community-engagement-toolkit/)

[Safe Routes Partnership Community](https://www.saferoutespartnership.org/sites/default/files/resource_files/community_engagement_guide_final.pdf)

[Engagement Guide.](https://www.saferoutespartnership.org/sites/default/files/resource_files/community_engagement_guide_final.pdf)

[The Spectrum of Community Engagement](https://www.facilitatingpower.com/spectrum_of_community_engagement_to_ownership)

[to Ownership.](https://www.facilitatingpower.com/spectrum_of_community_engagement_to_ownership)

Engagement Activities (page 10). Timeline (page 13).

Communications (page 14).

Feedback Loops (page 17).

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Optional Resources (page 18).

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Community Engagement Plan Template | 2



**Strategy Basics**

Outline the strategy basics in the chart below as a quick reference guide.

Community Engagement Plan Template | 3

**Strategy Basics**

Strategy Name

Community

*Which county, city, neighborhood, or other population group does this initiative aim to serve?*

Public Health Challenge(s)

Primary Target Outcome

Lead Staff

Support Staff

Partners

*Which external agencies or organizations are supporting you/your agency in this work?*

Strategy Timeframe

Start Date:

End Date:

Resources

*Consider different kinds of resources available for*

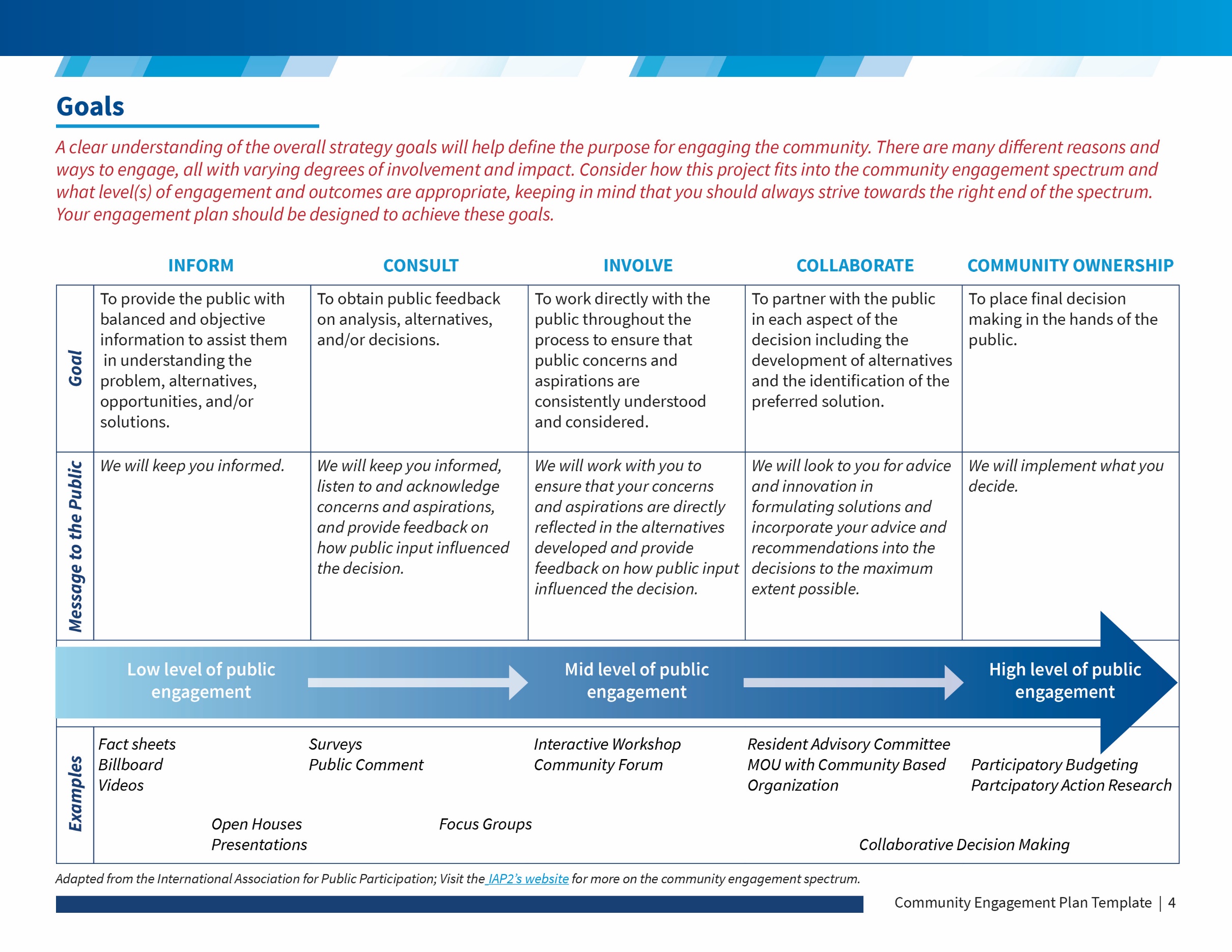
*this engagement.*

Budget ($):

Staff Hours:

In-kind Donations:

Other:



[*IAP2’s website*](https://organizingengagement.org/models/spectrum-of-public-participation/)

**INVOLVE**



Community Engagement Plan Template | 5

**Goals**

What is the purpose of engagement for this strategy?

How do you intend to leverage community knowledge and resources to shape outcomes?

Which level of the community engagement spectrum is most appropriate for this strategy?

*If different levels are appropriate at different phases,*

*specify.*

What do you hope community members will contribute to the strategy?

*This may include ideas, a clear outline of their needs,*

*expertise on local context, or other contributions.*

What do community members need to learn about the strategy, and what do we need to learn from community members? *Consider information they may need to engage meaningfully and/or educational objectives of the project.*

At what phases during the process should the community be engaged?



**People**

Before you begin your strategy, think about who it serves, who will be impacted, and who can support you in this effort. The engagement process

should be inclusive to accurately address community needs and desires, leverage the expertise of the entire community, and build ownership. Identifying who will be impacted and who can support the process from the beginning will help you invite them into the process and periodically reevaluate to make sure they are actually involved as you get started.

Community Engagement Plan Template | 6

**People**

Who lives in the community? *Demographic data does not tell the full story of a community but reviewing key figures early on*

*can help set a benchmark of what representative engagement in this area would look like. If*

*you gather demographic information from the community members you engage, you can compare that information to these data to monitor if you are reaching a representative group from the community and adjust your strategies to better connect with different types of people, if needed. Download your community’s statistics from* [data.census.gov](https://data.census.gov/)*.*

Use the “Demographic Data” table on page 18 to gather community demographic data. Record priority groups and notable community characteristics here.

Percent of Households without a Car:

Languages Spoken at Home:

Race:

Ethnicity:

Age:

Other Priority Groups:

Who is the strategy meant to serve?



Community Engagement Plan Template | 7

Who will be affected by the strategy? Who has been left out of community decision- making in the past?

*Consider groups who will be both intentionally and unintentionally impacted by the process and outcomes of this project. Think about residents, neighborhoods, schools, businesses, employee groups, visitors, places of worship, community*

*centers, and others who may have a role. Pay special attention to groups who have traditionally been left out of community decision-making in the past, such as communities of color, people with low incomes, people with disabilities, etc.*

Who could help inform the strategy? *Community members have a wealth of expertise. Think of who may have the knowledge, perspectives, or connections to inform this effort, including known individuals, groups, or types of people you will need to seek out.*

Who will be partners in implementation? *Think of who will be needed to successfully execute this strategy, including people who may offer supporting resources or whose approvals may be*

*required.*



**Context**

Community context, or the particular cultural, social, and political circumstances within a given community, will inform the nature of the most effective engagement and communications approaches to make connections, get meaningful input, build trust, and respect the time and expertise of participants. Answer the following questions to begin thinking of community factors that will influence your plan.

Community Engagement Plan Template | 8

**Context**

Has this community been engaged in a

similar effort before?

*Consider other efforts you are aware of that might inform your approach. Have past efforts built trust in government through positive outcomes, or led to additional disenfranchisement due to a lack of follow-through?*

Previous Project(s) (if applicable)

What went well?

What strengths and opportunities does the community have that will help your effort succeed?

Are there any unique factors that should be considered to make this engagement and strategy more successful?

*Think about local opportunities and challenges that may affect engagement.*

Other Priority Groups:

What are the challenges faced?

*For example, historic practices of redlining led to racial segregation and inequities between neighborhoods.*



Community Engagement Plan Template | 9

Are there any people in this community who have been difficult to reach or who may experience barriers to engagement? *Consider factors like access to transportation, need for childcare, available technology, social networks, multiple languages spoken, lack of interest, or distrust in government.*

Are there any constraints that will influence

how we should engage the community? *For example, do community members have reliable access to broadband internet if engagement opportunities are online?*

What relationships do we have that could help us reach the community effectively? Who else could help us that we should reach out to?

*Think about who in your network has built trusting relationships within this community who may be able to make introductions or spread the word. This may*

*include individuals or organizations like schools.*



**Plan**

With your strategy goals, community, and context in mind, it’s time to develop a plan to engage and communicate.

Engagement Activities

Hold a brainstorming session with your team to consider which engagement activities will reach a broad and representative group and result in useful outcomes to help you achieve your purpose for engaging the community. Consider how to overcome potential barriers to engagement and how to provide enough variety to appeal to different people and accommodate different schedules as you make your selections. Emphasize activities in the collaborate and community ownership side of the spectrum (see page 4).

Modify the table below to fit your project by:

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•

Deleting rows for activities that will not be used for this project.

Filling in the goal of each activity, who will be responsible, where and when it should happen, and any other notes or considerations. Adding your own activities to best suit your project and community context.

Community Engagement Plan Template | 10

**Engagement Activities**

**Inform**

**Consult**

**Involve**

**Collaborate**

**Community Ownership**

**Goal**

**Responsibility**

**Location or Platform (if applicable)**

**Timeline**

**Notes**

**In Person**

Open House

Town Hall Meeting

Interactive Workshop

Listening Session

Walk/Bike Audit

Individual or Small Group Interviews

Pop-Up Event



Community Engagement Plan Template | 11

**Engagement Activities**

**Inform**

**Consult**

**Involve**

**Collaborate**

**Community Ownership**

**Goal**

**Responsibility**

**Location or Platform (if applicable)**

**Timeline**

**Notes**

Self-Guided Open House Display

Demonstration Event

Storytelling Event or Booth

Participatory Budgeting Activity

Collaborative Decision Making

Other (*Add your own!*)

**Digital**

Project Website or Web Page

Virtual Open House

Virtual Town Hall Meeting

Virtual Interactive Workshop

Virtual Listening Session

Virtual Walk/Bike Audit

Virtual Individual or Small Group Interviews

Interactive Online Map

Online Survey



Community Engagement Plan Template | 12

**Engagement Activities**

**Inform**

**Consult**

**Involve**

**Collaborate**

**Community Ownership**

**Goal**

**Responsibility**

**Location or Platform (if applicable)**

**Timeline**

**Notes**

Online Discussion Forum

Other (*Add your own!*)

**Remote (Analog)**

Paper Survey

Individual Self-Guided Walk/Bike Audits

Phone Calls

Other (*Add your own!*)

**Activity Key**

*Copy and paste these icons onto the timeline above. Add numbers that correspond to the list below. If needed, create your own new category.*

**#** *In-person* **#** *Pop-up* **#** *Virtual* **#** *Survey* **#** *Interactive* **#** *Activity in* **#** *Advisory* **#** *Partner*

*Meeting/Event Meeting/Event Map the Field Committee Organization*

*Meeting Meeting*



Timeline

Once you’ve selected your engagement activities, use the following template to outline how they will align with other project activities. Customize

the timeline to fit your project by:

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Adding, removing, or renaming rows and columns as needed to fit your process and timeline.

Adjusting the colored cells to align with the timeframe for each project task.

Copying and pasting the icons below to show when each of your planned activities will happen. (You may need to drag the icon into the

appropriate place after pasting).

Numbering each icon you place and write the name of the corresponding activity in the numbered list below the chart.

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1)

2)

3)

Activity 1

Activity 2

Activity 3

1. Activity 4
2. Activity 5
3. Activity 6

7) Etc.

Community Engagement Plan Template | 13

**Engagement Timeline**

**Jan. Feb. Mar. Apr. May Jun. Jul. Aug. Sep. Oct. Nov. Dec.**

Activity 1

Activity 2

Activity 3

Activity 4

#

*Partner*

*Organization*

*Meeting*

#

*Advisory*

*Committee*

*Meeting*

#

*Activity in*

*the Field*

#

*Interactive*

*Map*

#

*Survey*

#

*Virtual*

*Meeting/Event*

#

*Pop-up*

#

*In-person*

*Meeting/Event*



Communications

Clear, regular communication will help get the word out about your strategy, educate the community, and get people to participate in your engagement activities. Work with community members to co-develop or review communications materials to ensure they are well targeted to the population(s) you are trying to reach.

Community Engagement Plan Template | 14

**Communications Basics**

Who will be the point of contact for the public?

Name:

Role/Organization:

Phone:

Email:

Who will be the point of contact for the press, if

different?

Name:

Role/Organization:

Phone:

Email:

Which forms of communication have been most effective in this community in the past? *Consider any recent changes that may affect what would work best now. Consider social media, traditional media, newsletters, etc.*

In which language(s) should project communications be provided to reach the community?

*What languages are commonly spoken by the community? Are there literacy or other*

*considerations (such as reading level, accessibility for people with low vision, etc.)?*

Will there be a logo, colors, fonts, or other branding elements that should be used in communications? If so, specify.

Will there be a mailing list?

Yes or No:

If yes, how will people sign up?

If yes, how will the mailing list be managed?

If using MailChimp or another platform to manage the mailing list, what is the login information?



The table below outlines a range of possible communications tools that could help increase awareness about your strategy and connect with community members. Not every tool is the right fit for every project. Factors like community context and budget will help determine which ones are the right choices for this effort. Modify the table below to fit your strategy by:

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Deleting rows for tools that will not be used for this project.

Filling in who will be responsible, when it should happen, what resources you will need to be successful, and any other notes or considerations.

Adding your own tools to best suit your project and community context.

•

Community Engagement Plan Template | 15

**Communication Tools**

**Tool Responsibility Timeline Resources Needed Notes**

**Digital**

Project website (freestanding)

Project webpage

Project or community mailing list

Feature in e-newsletter(s)

Social media posts

Social media reports by partners

Notice on NextDoor or similar platform

Video

Blog posts on project site/page

Featured post by local blogger

Social media posts or emails from elected

officials to constituents

Other (*Add your own!*)

**Print**

Postcards

Flyers

Posters

Storefront window displays

Yard signs



Community Engagement Plan Template | 16

**Communication Tools**

**Tool Responsibility Timeline Resources Needed Notes**

Bus shelter or kiosk ads

Banners

Billboards

Feature in print newsletter(s)

Advertisement in local publication(s)

Utility mailers

Other (*Add your own!*)

**Media**

Press release

Targeted article with local journalist

Television news spot

Radio news spot

Other (*Add your own!*)

**In Person**

Announcements at monthly/quarterly meetings for local organizations

Pop-up booth at local events

Other (*Add your own!*)

**Other (Add your own!)**

School announcements

Phone calls



Feedback Loops

Meaningful engagement should shape strategy outcomes. Ensuring people who have taken the time to participate understand how their

contributions are being used helps validate what we have heard and build trust over the long term.

Identify how you will incorporate resident/community feedback into the strategy. Maintain a clear communication feedback loop with participants throughout the process so that they can see how their ideas directly impacted the outcome. In some cases, this may mean using some of the communications tools selected above to provide updates or allowing interim feedback outside of the specified engagement activities. It could also mean adjusting your engagement plan, timeline, or activities if you find that priority populations have not been well represented in early stages of engagement.

Modify the table below to fit your strategy by:

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•

Deleting rows for tools that will not be used for this project.

Filling in who will be responsible, when it should happen, and any other notes or considerations. Adding your own tools to best suit your strategy and community context.

Community Engagement Plan Template | 17

**Feedback Loop Tools**

**Tool Online In Person Responsibility Timeline Notes**

Post updates to project website or web page

x

Blog posts

x

Share activity summaries or results

x

x

Project mailing list updates

x

Contact form on project website or web page

x

Allow and respond to direct emails to point of contact throughout project

x

Update announcement at a neighborhood or other organization meeting

x

x

Highlight what you’ve heard so far at next engagement activity

x

x

Cite how community input shaped the project in the final

deliverable

x

Direct follow-ups with engaged individuals

x

x

Revisit and reevaluate engagement plan based on participation

x

x

Other (*Add your own!*)



**Optional Resources**

The following optional resources may help you organize your community contact information, online portals, and other information. If desired, use them to help keep track of key project information as you go. They can be modified to suit your project needs. Some of this information may be private and should not be made available publicly.

Demographic Data

Use the chart on the next page to do research on your community makeup and track representation throughout your engagement process.

Before engagement

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Start by visiting [data.census.gov](https://data.census.gov/) to gather community demographics as relevant; enter those data in Column 2.

Review the data to help understand your community makeup and identify key populations to target. You may want to consider aiming for over-representation of your priority populations.

Create survey questions to gather corresponding information from all the people you engage throughout the process. (Note that not everyone feels comfortable sharing this information and responding should be optional and anonymous).

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During engagement

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Pick a time part-way through your engagement process or phase to compile responses and fill those into Column 3 of the table.

Compare your results to the community makeup overall. Identify groups that are over- or under-represented in your engagement efforts so

far.

If needed, identify ways to improve outreach to under-represented groups during the remainder of your outreach process. This may involve arranging for one-on-one meetings, offering additional meeting times or location, or reaching out to community leaders for help with spreading the word. You may also need to consider extending your timeline if community representation is low.

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After engagement

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Share the results of your demographic survey along with a summary of what people told you in your final documentation.

Acknowledge where engagement fell short of representing the entire community and how that could have affected outcomes.

Community Engagement Plan Template | 18



Community Engagement Plan Template | 19

**Category**

**Census % (Year: )**

*Download and record your community data here. You can modify this table to add or remove categories based on the demographic information you plan to gather from the community.*

**Engagement %**

*Use this column to record engagement demographics and compare with the community overall.*

**Race and Hispanic Origin**

White

Black

American Indian and Alaska Native

Asian

Other Race

Two or more races

Hispanic or Latinx

**Gender**

Female

Male

Other\*

**Age**

< 17

18 - 24

25 - 34

35 - 44

45 - 54

55 - 65

Above 66

**Educational Attainment**

Less than high school or equivalent degree

High school or equivalent degree

Some college, no degree

Associate’s degree

Bachelor’s degree

Graduate or professional degree



*\* Data not collected in US Census.*

Community Engagement Plan Template | 20

**Category**

**Census % (Year: )**

**Engagement %**

**Household income in the past 12 months**

Less than $15,000

$15,000 to $24,999

$25,000 to $49,999

$50,000 to $99,999

$100,000 to $149,999

$150,000 or more

**Car Ownership by Household**

0

1

2

3+

**Means of transportation to work**

Drove alone

Carpooled

Public transportation

Walked

Biked

Other means

Worked at home

**Disability**

Hearing difficulty

Vision difficulty

Cognitive difficulty

Ambulatory difficulty

Self-care difficulty

Independent living difficulty



Community Contact Information

Community Engagement Plan Template | 21

**Community Contacts**

**Organization Regular Meeting Point of Contact Role Email Phone Notes or event time Name**



Mailing List

Social Media

Community Engagement Plan Template | 22

**Social Media**

Which organization(s) will be responsible for posting?

Which platforms will be used?

*Does you or your partner organization plan to post on Instagram, Twitter, Facebook, LinkedIn, or other platforms?*

Social Media Manager

*Who has access to the social accounts and will be responsible for publishing content?*

*Schedule*

*Are there set dates for review, approvals, or posting schedules?*

**Mailing List**

Format

*Will your mailing list be managed using a spreadsheet or a service like MailChimp?*

Login

*If using an online platform.*

Username:

Password:



Online Engagement Platforms

Community Engagement Plan Template | 23

**Online Engagement Platforms**

Which platform will you use for virtual meetings?

*Consider Zoom, Facebook Live, WebEx, MS Teams,*

*Bluejeans, or others.*

Which platform will you use for online surveys? *Consider Alchemer, Survey Gizmo, Google Forms, or others.*

Which platform will you use for interactive maps?

*Consider Google My Maps, Wikimaps, ArcMap Online,*

*Leaflet, or others.*

**Who will feel welcome here?**



Event Venues

Community Engagement Plan Template | 24

**Event Venues**

**Name Address Website Point of Capacity Cost ADA Notes**

**Contact Accessible?**