COLLECTIVE
IMPACT

Assessing Your Engagement Strategies

Adapted from Tamarack Institute resources.
Learn more at: http://tamarackcommunity.ca/

LIVING CITIES
INNOVATE ▸ INVEST ▸ LEAD

Overview

Purpose

To help you and your intitiative partners think through the alignment between your strategies and goals for engaging community members.

Guidelines

Expected group time required: ~1-1.5 hours depending on depth of discussion

Suggested pre-requisites to complete this exercise:

1. Read "Why Involve the Community in Collective Impact at all?"
2. Identify goals for engaging community members

If you are part of an existing initiative working with community members, complete the exercise in a normal order, from steps 1-4.

If you are using this exercise to design a new initiative, start with step 4 and then use steps 2-3 as a frame for your discussion to create engagement strategies.

This exercise is designed to be used as tool for guiding a person or a group through assessment of their current community engagement strategies. It is recommended that the exercise be used as a conversation guide to provide some structure to group discussion, but it can be used individually as well.

It is important to emphasize that the value of this exercise is not in "completion" but in the iterative process of thinking through the link between your strategies and your goals, regardless of how far along you are in the collective impact process.

Preview of Steps

1. Identify engagement strategies and engagement goals
2. List your assumptions
3. Examine your assumptions
4. Map new possible strategies
5. Iterate

Key Terms

Collective Impact

A framework through which cross-sector partnerships work together to achieve large-scale results and enduring change. Effective collective impact initiatives include:

- A cross-sector partnership of decision makers and do-ers,
- Who have defined and agreed upon a shared result to strive toward,
- And are committed to change their behavior and redirect funding flows to achieve that result,
- And are using data to create feedback loops that signal progress and drive continuous improvement.

Learn more on our website.

Community Engagement

A general phrase that broadly references the process by which community members are included in and contribute to colletive impact initiatives.

Community Member or Group

Used as a non-specific reference to people or "categories" of people who will be affected by a collective impact initiative. Groups can be formal or informal and can be organized by geography, age, gender, ethnicity, occupation, income level, etc. Can be thought of as the "WHO" part of your engagement plan.

Engagment Strategies

Specific actions, methods, and/or activities for working with community members and accomplishing engagement goals. Can be thought of as the "HOW" part of your engagement plan.

Examples: surveys, town hall meetings, working groups, interviews, mixers, invitations to join steering committees, etc.

Engagement Goals

The specific purpose behind each of your engagement strategies.
Can be thought of as the "WHY" part of your engagement plan.

Engagement Plan

A general phrase meant to reference all components of an intentional process for working with community members and groups, including engagement strategies and engagement goals.

Assumptions

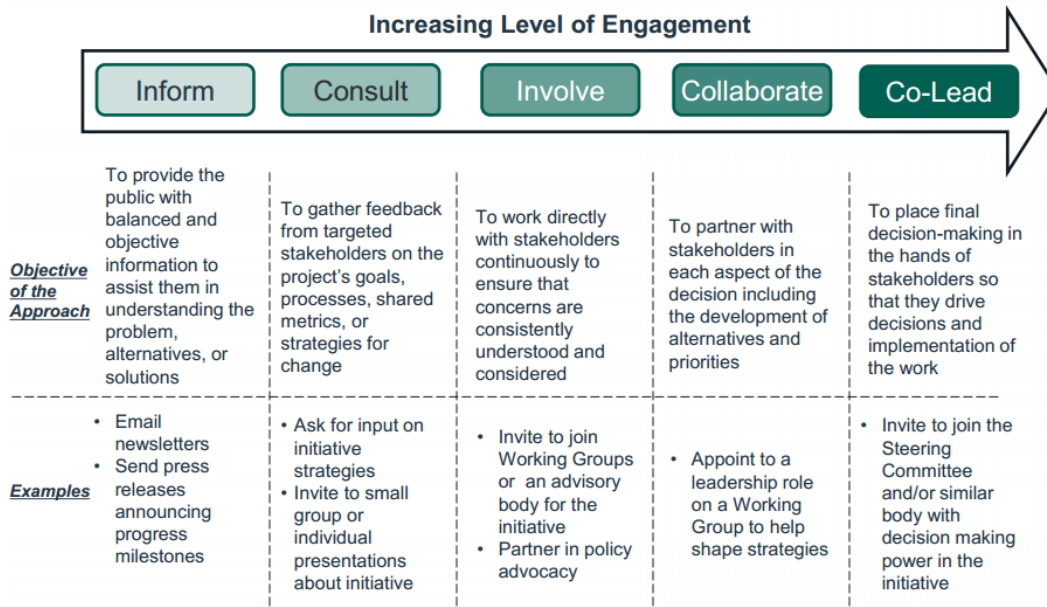Something accepted as true or certain to happen without clear proof.

Step 1. Identify Strategies and Goals

Directions

On a white board or separate sheet of paper, draw a table with columns A – E (as shown in the example on the page 5).

Then, fill it out based on these descriptions:

Column A. List all community groups that you currently engage or attempt to engage. They do not have to be formal "groups," and can be lose affiliations or simply "people who live on block 'X'".

Column B. Add your specific engagement goals for each community group.

Column C. Add the engagement strategies you are currently using to engage each community group.

Column D. Explain how the input and/or participation from each community group is incorporated into the initiative.

Column E. List the level at which you believe you are currently engaging the community groups you listed in Column A, using the engagement spectrum below as a reference.

Increasing Level of Engagement

	Inform	Consult	Involve	Collaborate	Co-Lead
Objective of the Approach	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, or solutions	To gather feedback from targeted stakeholders on the project's goals, processes, shared metrics, or strategies for change	To work directly with stakeholders continuously to ensure that concerns are consistently understood and considered	To partner with stakeholders in each aspect of the decision including the development of alternatives and priorities	To place final decision-making in the hands of stakeholders so that they drive decisions and implementation of the work
Examples	• Email newsletters • Send press releases announcing progress milestones	• Ask for input on initiative strategies • Invite to small group or individual presentations about initiative	• Invite to join Working Groups or an advisory body for the initiative • Partner in policy advocacy	• Appoint to a leadership role on a Working Group to help shape strategies	• Invite to join the Steering Committee and/or similar body with decision making power in the initiative

Note: In this spectrum, developed by IAP2 and adapted by Tamarack and the Collective Impact Forum, "Stakeholders" generally refers to community members.

Step 1. Example

A. "WHO"	B. "WHY"	C. "HOW"	D. "WHAT"	E. "DEPTH"
What community groups are you engaging?	What is your goal for engaging them?	What strategies are you using to engage them?	How is their input/ participation incorporated into the initiative?	At what level on the spectrum are they engaged?
Immigrant entrepreneurs	*Better understand how we could increase number of immigrant owned buisinesses*	*community brainstorming meetings with the mayor and other public officials*	*Establish action committees to address identified barriers and priorities*	*Involve*

Note: This is one example for demonstration purposes. Use as many rows as necessary to capture the current state of your initiative.

Things to Consider/Discuss:

- How well do your engagement strategies (Column C) align with your engagement goals (Column B)?

- How do your engagement strategies align with the overall shared result your initiative is striving toward?

Stuck?

- Language: See the key terms guide on page 3 if you get confused about how we are using specific terms in this context. A good rule of thumb is that the terms in this exercise are used loosely and are open to some interpretation. Focus on the alignment between the components and use whatever language makes the most sense to you and your partners.

- Engagement Spectrum (Column E): The engagement spectrum (on page 4) is simply a tool for considering different levels of input and decision-making power. If you start to get stuck on the vocabulary or which specific category a strategy might fall within, remember to come back to the concept behind it: who makes the decisions and on what are they basing those decisions?

Step 2. List Your Assumptions

Overview

Idenitifying your assumptions can be the most difficult step in the process. Often, we have closely held beliefs about what is true and how to do our work that are difficult to examine because they are not in our explicit thoughts and are based on our perception.

Articulating your assumptions explicitly can be helpful to highlight pre-concieved notions about engagement strategies that may or may not be true. For example, if you want resident input about a program or initiative, you may design a survey to collect their feedback. However, that assumes residents are willing to fill out a survey— so if they are not (for whatever reason), you may need to consider another way to reach them.

Directions

- On a white board or separate sheet of paper, write out one strategy that you listed in Column C during Step 1.

- Draw a box beneath it (as shown in the example on page 7), and list as many related assumptions as you can.

- Continue this process for the strategies you listed in Column C during Step 1 (or as many as you have time for).

Step 2. Example

Strategy: *community brainstorming sessions with mayor and other public officials*

Assumptions:

- *Immigrant entrepreneurs would show up at meetings.*

- *Immigrant entreprenuers would have knowledge about how to increase entrepreneurship.*

- *The mayor's presence would increase meeting attendance.*

- *Immigrant entrepreneurs would be willing to share their thoughts and opinions if they attend the meeting.*

- *Multiple sessions will be required to get enough information.*

Note: This is one example for demonstration purposes. Make a new box for each strategy for which you plan to list assumptions

Stuck?

A good way to start identifying hidden assumptions is to ask yourself "what MUST be true for this strategy to work?"

Step 3. Examine Your Assumptions

Overview

In the process of listing your assumptions, you may begin to examine whether or not they are true. This examination is a necessary next step to listing your assumptions. Examining them can identify gaps in your engagement strategies and allow you to improve your work with communities. Examing assumptions will help you continuously improve by reflecting on what is working, what isn't, and why.

Directions

Use the questions below to examine the assumptions you listed in Step 2 and discuss your current strategies.

Discussion Questions

- Are they any assumptions we think might be false? If so, what does this mean for your work?

- Who are we not reaching with these strategies that we should be?

- Could we work more closely with the community groups we have identified?

- Are there root causes of the problem we are trying to solve that we are ignoring?

- What barriers to working with community members do these assumptions reveal?

- What barriers might we confront with these new strategies?

Step 3. Example

Step 2 example for reference:
Strategy: *community brainstorming sessions with mayor and other public officials*

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Assumptions:
- *Immigrant entrepreneurs would show up at meetings*

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- *Multiple sessions will be required to get enough information*

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Sample responses to questions:

- Are they any assumptions we think might be false?
  - *"Immigrant entrepreneurs would show up at meetings": Good chance they work very long hours running their businesses and cannot attend brainstorming meetings in person*

- If so, what does this mean for your work?
  - *Maybe we should try surveys?*
  - *Maybe we could conduct individual interviews?*

- Could we work more closely with the community groups we have identified?
  - *Yes. Maybe we should form a partnership with Latino Chamber of Commerce?*

Note: The sample ideas in italics above are for demonstration purposes. Feel free to discuss or consider the questions in whatever order makes sense to you, using whatever notetaking method you are most comfortable with. If these questions don't fit your work, feel free to come up with your own.

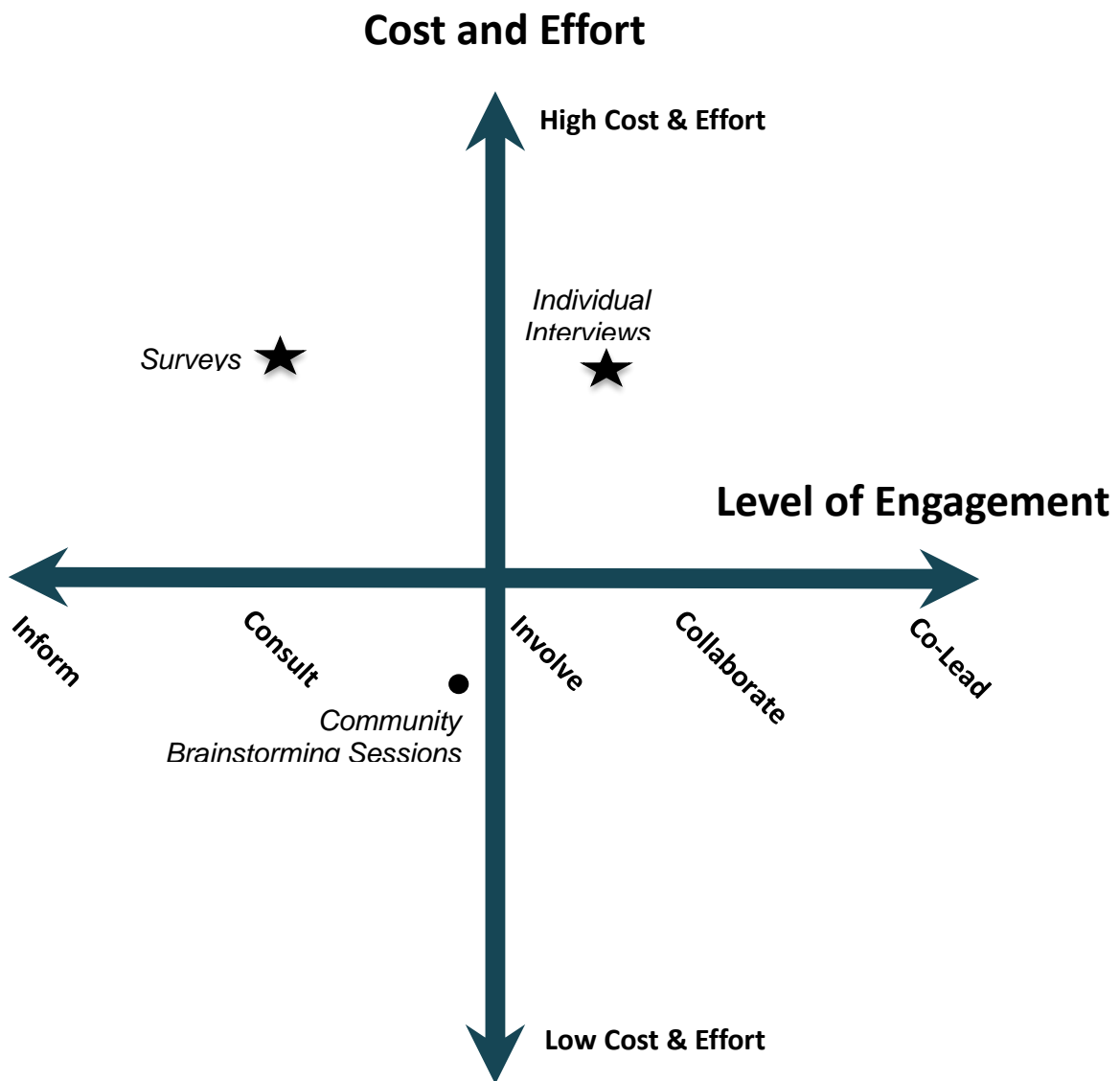# Step 4. Map New Possible Strategies

Overview

Once you've examined and discussed your assumptions connected to your current strategies for engaging community groups, you may want to come up with new possible engagement strategies. The grid in this step can help you create a visual representation of the resource requirements and depth of your engagement plan. It can help you think about the tradeoffs as you consider additional engagement strategies that could adjust your current plan or fill in gaps.

Note: If you do not have existing engagement strategies and you using this as a design tool, focus on the second bulleted direction below and only plot possible engagement strategies.

Directions

- On a white board or separate sheet of paper, draw a simple graph with 4 quadrants (like the one in the example on the next page).

- Plot the engagement strategies you listed under Column C in Step 1.

- Using a different symbol, plot new possible engagement strategies that have surfaced as a result of your analysis and discussion.

Step 4. Example

Cost and Effort

High Cost & Effort

Individual Interviews

Surveys ★   ★

Level of Engagement

Inform   Consult   Involve   Collaborate   Co-Lead

●
Community Brainstorming Sessions

Low Cost & Effort

Stuck?

The vertical axis represents "cost and effort" but this can be confusing if your engagement strategy would be high cost but low effort or vise versa. In this case, think of this axis as "resources." Some initiatives have a great deal of volunteer support but little funding and for some it is the other way around. Map your engagement strategies relative to the impact on the resources you have available. If you're confused about the horizontal axis, refer to the engagement spectrum on page 4.

Step 5. Iterate

Overview

Now that you have identified new possible engagement strategies, you are ready to cycle through this exercise again to assess them by outlining your related engagement goals and assumptions.

Again, remember that the value of this exercise is not in "completion" but in the iterative process of thinking through the link between your engagement strategies and your engagement goals and using new information you gather along the way to reflect on your assumptions and prove them true or false.

Directions

- List the new possible engagement strategies from Step 4 in Column C. Then fill out the rest of the columns.

- Once you are finished filling out the table, continue process of iteration by going through Steps 2 through 4 again.

A. "WHO"	B. "WHY"	C. "HOW"	D. "WHAT"	E. "DEPTH"
What community groups do you hope to engage?	What is your goal for engaging them?	What strategies will you use to engage them?	How will their input/ participation be incorporated into the initiative?	At what level on the spectrum will they be engaged?