



GUIDEBOOK

Community Engagement during the COVID-19 Pandemic and Beyond

A Guide for Community-Based Organizations

Martha Fedorowicz

with Olivia Arena and Kimberly Burrowes

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Community Engagement during the COVID-19 Pandemic and Beyond

This guide is meant to assist community-based organizations that are interested in facilitating remote community engagement activities. Although this guide was developed as a response to the COVID-19 pandemic, it can also be used by organizations looking to broaden their outreach strategy generally.

In this guide, we present a list of tools that can be used for facilitating remote community engagement activities and aim to elevate some best practices for any form of in-person or remote community engagement. This brief consists of the following sections:

- What Is Community Engagement?
- Is Now the Right Time for Community Engagement?
- Tools for Engagement
 - » Nondigital Tools
 - » Digital Tools
- Best Practices for All Community Engagement
- Sample Engagement Methods

In the appendices, we provide a few worksheets to help you plan your community engagement activities and a list of supplemental resources on inclusive community engagement methods.

What Is Community Engagement?

Community engagement is a process by which community members come together to reflect on and make decisions about the future of their community. The term “community engagement” often refers to a specific process facilitated by local governments or community-based organizations when they have an impending action or necessary step. For example, they may use community engagement processes to plan how to use vacant space in a community, to respond to a proposed development, or to develop a response to a public health or environmental challenge. Community engagement can take place in person or online, and it can be an isolated, one-time event, or it can be an ongoing engagement.

Over the past decade, policymakers and practitioners have increasingly focused on the need to meaningfully engage people who have long been left out of community engagement activities. Groups often excluded include the elderly, citizens reentering public life after incarceration, people with limited access to the internet or with limited computer literacy, immigrants, homeless people, people with physical and mental disabilities, people with low incomes, people working several jobs or working during nontraditional hours, and people who are English-language learners. Moreover, rising levels of racial inequality and income inequality is a contributing factor to unequal access to public power (Holley 2016).

Community-based organizations have also recognized that community engagement must begin by building personal relationships *among* community members before those organizations can be encouraged to interact with neighborhood, community, and civic institutions.¹ As Kip Holley (2016) writes in the *Principles for Equitable and Inclusive Engagement*, “intentionally using the community engagement environment to build *bridging social capital*—social capital that is built among diverse community members—has been shown to help create new connections between diverse community members and make resources available within the community, encouraging community member to become involved in the lives of their neighbors. These connections reflect strong attachments to communities and a commitment to making them better places for everyone.”

Some common forms of community engagement include town halls, participatory budgeting, community mapping, community action planning, charrettes, crowdsourcing, surveys, community-based participatory research, and focus groups. Although we will not delve deeply into all of these methods in this guide, we will describe a few of them. You can also read more about these and other methods in the [Tamarack Institute’s Index of Community Engagement Techniques](#). All of these methods exist on a spectrum (Arnstein 1969). On one side of the spectrum are activities that “inform” the public about a

specific topic or event; on the other side are activities that “empower” community members by putting them in leadership roles. Table 1 presents the spectrum of community engagement, describes how to frame the goals of each level of engagement to community members, and offers some sample engagement techniques that fit under each level.

TABLE 1
Spectrum of Community Engagement

	Inform	Consult	Involve	Collaborate	Empower
Public participation goal	To provide the public with balanced and objective information to help them understand the problem, alternatives, opportunities, and/or solutions	To obtain public feedback on analysis, alternatives, and/or decisions	To work directly with the public throughout the process to ensure public concerns and aspirations are consistently understood and considered	To partner with the public in each aspect of the decision, including developing alternatives and identifying the preferred solution	To place final decisions in the hands of the public
Promise to the public	We will keep you informed	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced that decision	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision	We will look to you for direct advice and innovation in formulating solutions and incorporate your advice and recommendations into the decision to the maximum extent possible	We will implement what you decide
Example techniques	<ul style="list-style-type: none"> ■ Fact sheets ■ Websites ■ Open houses 	<ul style="list-style-type: none"> ■ Public comment ■ Focus groups ■ Surveys ■ Public meetings 	<ul style="list-style-type: none"> ■ Workshops ■ Deliberative polling 	<ul style="list-style-type: none"> ■ Citizen advisory committees ■ Consensus building ■ Participatory decisionmaking 	<ul style="list-style-type: none"> ■ Citizen juries ■ Ballots ■ Delegated decisions

Source: IAP Spectrum of Public Participation, found at “The Three Pillars of Public Participation,” International Association for Public Participation, accessed August 5, 2020, <https://www.iap2.org/page/pillars>.

Is Now the Right Time for Community Engagement?

Community-based organizations can engage community members in many ways during the COVID-19 pandemic, so before beginning outreach, ask yourself the following questions (a worksheet with these questions can be found at the end of the guide):

1. What are we hoping to achieve through community engagement? When we receive that input, will we be able to act on it?
2. Is it critical that we collect this input right now? Could some input gathering be postponed one week? One month? Several months? How will postponing engagements affect the long-term project goals?
3. Do the engagements we want to host and the questions we want to ask reflect the current situation? How can we adapt our questions to acknowledge what is going on and offer space for community members to talk about how they're doing during this pandemic?
4. Will anyone respond to our questions right now?
5. Can we engage a representative sample of our community, or would we miss some people if we proceeded with engagement right now?
6. How will community members receive our request (i.e., will they be accommodating, frustrated, or bothered)?
7. Do we have mechanisms in place to avoid overburdening our community members with requests for input? (Answering this question will require an awareness of what other outreach community groups are doing and of what resources and budget are available.)
8. Are there other things we can be doing now to advance our goals or support community members that don't involve hosting community engagement events or conducting surveys? If so, are these options we can easily implement and that fit within our budget and capabilities?

Answering these questions can provide some insight into whether now is most appropriate for launching a community engagement strategy. How the public health and economic crisis is affecting different community members is unclear, but understanding that effect is critical for building trust and empowering residents. If community members sense that you are ignoring their current situation or not being responsive to more immediate needs, you risk losing the community's trust and damaging relationships that will be critical to future work.

Many project-planning approaches are available to help determine how community engagement approaches fit into larger project goals. These include **developing a logic model for an engagement** or **reassessing the team's original strategy** given a crisis or major roadblock. For example, Marian Urquilla of StrategyLift developed a Strategy Triage Tool that can help organizations determine what they can and should do now and what should be delayed until people can gather safely.² Worksheets to help your organization go through these planning steps can be found at the end of this guide.

Tools for Engagement

Nondigital Tools for Community Engagement during the COVID-19 Pandemic and Beyond

When beginning to scope a community engagement strategy, consider the audience and their access to participation in a feedback model. These considerations include assessing which channels can best reach different community members and who some of the trusted sources might be for sharing this information. Even now as many people practice social distancing, opportunities can arise to connect with people with limited mobility, internet access, limited familiarity with computers and the internet, or time. In this section, we share some nondigital tools for engaging with groups who are often excluded from community engagement activities.

In addition to considering some of the engagement methods below, community-based organizations should also consider how to augment their outreach to better engage people with different levels of language ability and access. Groups who are often excluded from digital forms of engagement include the elderly, citizens reentering public life after incarceration, immigrants, the homeless, people with physical and mental disabilities, people with low incomes, people working several jobs or working nontraditional hours, and people who are English-language learners. The COVID-19 pandemic may have expanded that list to include people who have had to take on additional child care, work, or schooling responsibilities to support their family and people who have lost their jobs, become food insecure, or become housing unstable. These groups should not be left out of engagement efforts, so it will be critical to consider the new circumstances that your community members find themselves in before launching an engagement and to meet people where they are given present circumstances.

If you decide to proceed with nondigital engagement methods, you might consider some of the following:

- **Making phone calls and phone trees** can be a great way to engage with the elderly, people who don't have access to the internet, or people without the computer literacy skills to navigate social media. A phone tree is a planned system for reaching out to members in your community that designates key callers who contact specific people under their "branch" of the tree. These people will then reach out to more people under their own branches. For more information on how to set up a phone tree, consult "[How to Build a Phone Tree](#)" from the American Association of University Women.³ If your community has a nursing home, you

might consider soliciting the support of staff there to distribute flyers about the project with a number to call if residents want to share thoughts on the project.

- **Mailing information to people's homes** is still an effective way to reach many groups. Mailers are often used to share information, but they may also include a survey for people to respond to a few questions. With this strategy, including a postage-paid envelope will encourage participation and reduce any disparities in response caused by income. This approach may have a lower response rate than online survey mechanisms, but it could lead to rich feedback from those that fill out a survey. If only used to share information, this method could reach groups who may not receive the information through phone or online engagement or who may feel uncomfortable sharing information digitally. To connect mailed-in responses with those submitted online, a staff member from the community-based organization should manually input mailed-in surveys into whatever digital survey response tool the team is using so that all responses can be found in one place.
- **Using community networks and connections** to distribute newsletters or deliver a survey. Think about ways to engage with these groups through other people they know. For example, could you get someone's grandchild to call their grandparents and conduct a survey? Could you use the head of a realtor's group to connect with realtors in their network? Could religious organizations or other community-based networks share project information through their channels? By capitalizing on existing community networks and connections, you may be able to gather more honest, in-depth responses and gather a greater number of responses. Plus, utilizing community champions (who people already feel comfortable talking to) will help build trust in the community.
- **Utilizing gatherings that *are* happening in person** (i.e., mutual-aid services and materials, technology pickups from schools, etc.) to meet people where they are. Although most in-person events have been canceled during the pandemic, many activities are still operating to ensure that people have access to the resources and supports they need. By partnering with another community-based organization that is distributing food or school supplies, or by operating a food drive yourself, you can use these brief moments of human interaction strategically to share information, ask questions, and brainstorm about how policies or programs could be improved.⁴

Digital Tools for Community Engagement

Several online platforms are available for engaging community members. Considering your target audience and the key messages you want to deliver can help you to determine the most appropriate tool to use. This section presents some available online platforms and how they can be best used for community engagement.

SOCIAL MEDIA, SUCH AS FACEBOOK, INSTAGRAM, LINKEDIN, AND TIK TOK

Goal: Inform and consult

Notes about use: Social media platforms can offer a quick way to informally engage with community members. The users of each platform vary, and you will need to strategize how best to use each. These platforms are often popular with **young people**, though Facebook is used by many Baby Boomers (people born between 1944 and 1964).

Social media offers the ability to share **bite-sized information** and can increase awareness or garner support for a single issue. Having **strong visuals** is key. Sharing lengthy information, engaging on multiple topics, or conducting activities that require a feedback loop can be challenging tasks on social media. But these platforms can be used to **build trust** through regular contact or keep **ongoing attention** on a topic.

Facebook and LinkedIn also have **event pages** where users can advertise for a specific event.

Potential challenges to consider: One potential challenge for using social media platforms is that anyone can post anything. Thus, it is critical you have an **active moderator** on the platforms who approves content and who can monitor posts to address challenging comments as soon as they are posted.

Because of these challenges, social media platforms require more attention, engagement, and monitoring from you than other tools listed here.

Pricing: Using social media tools is free, but depending on your goals for each platform, you might also consider purchasing ads to gain new users or promote a project or event.

WEBINAR AND MEETING SOFTWARE, SUCH AS ZOOM, GOTOMEETING, GOOGLE HANGOUTS, LOOM, AND WEBEX

Goal: Inform, consult, and involve

Notes about use: Webinar software can be great tools to engage community members in **deeper conversations**, and they can help build and maintain connections while people are social distancing. Moreover, **they do not all require internet access**: many, such as Zoom and GoToMeeting, can be accessed by phone, which makes them more accessible to those without reliable internet service. Meetings can also be recorded, which helps preserve records of discussions.

These platforms offer the ability to host discussions, focus groups, and webinars on different topics, and they can be great tools for **gathering ideas and feedback** on a proposed plan. Facilitators can share their screen to show slides or visuals to attendees (but be aware that folks who call in using only a phone will not be able to see them). Although these platforms are often used to conduct meetings and host webinars, they can be fun and engaging ways to connect with people if used for creative activities and icebreakers.

Potential challenges to consider: Recent instances of “Zoom bombing” highlight the **privacy and security precautions** necessary to protect people on the call. Each platform has different ways to monitor who can join a call, so be sure to spend some time investigating how this works.

Further, if you plan to record a meeting, it is important to inform attendees of this, especially if you plan to publish the recording .

Pricing: Loom and Google Hangouts are both free with an account. Zoom, WebEx, and GoToMeeting have pricing plans for different levels of use.

ONLINE BRAINSTORMING TOOLS, SUCH AS MURAL, GOOGLE DOCS, BOX NOTE

Goal: Involve and collaborate

Notes about use: Online brainstorming and idea aggregation tools such as Mural, Google Docs, and Box Note can be great options to engage a group of people to work simultaneously in one document. Although you can invite anyone to work on these platforms, they might be best used with a **smaller advisory group during the planning phase of a project** so documents do not become too complicated.

Potential challenges to consider: Because anyone with a login and link to a document can contribute to it, **establish guidelines** for contributing so that everyone has a chance to contribute and the **documents don't become unruly**. Because many of these tools allow users to create different versions of documents, make someone responsible for **keeping folders clean and organized** and tracking document versions to make sure everyone is working on the most recent document.

Pricing: Google Docs is free with a Google account; the other two platforms are low cost.

COLLABORATIVE PROJECT PLANNING TOOLS, SUCH AS SHAPE, MIRO, WHIMSICAL, IDEAFLIP

Goal: Collaborate

Notes about use: If you want to improve your project planning, consider using a collaborative project planning site like the ones listed here. All of these platforms allow users to **create visual brainstorming spaces** and **organize ideas for strategic planning**.

Some include tools such as flowcharts, mind maps, workflow organizers, and surveys. Because many of these tools are quite advanced, they are best used by the main project team or by an advisory committee.

Potential challenges to consider: Because these tools are less used than and not as well-known as others listed previously, implementing them on a team may require some **training** so that community members feel comfortable with their use. Especially for people who are less adept with new technology, **users may need some time to feel comfortable** with them. Hosting trainings on their use will be important to include in project planning timelines.

Pricing: Miro is free; Shape, IdeaFlip, and Whimsical have different pricing plans depending on the number of users.

SURVEY PLATFORMS SUCH AS QUALTRICS, SURVEY MONKEY, GOOGLE FORMS

Goal: Consult

Notes about use: Surveys are a great way to gather information about community members and their needs or gather feedback on proposed plans and ideas. They can also be used to generate ideas, but they generally work best when both the questions and response choices (if not open-ended) are clear and direct.

Surveys can ask several types of question, including fill in the blank, multiple choice, tick boxes (where people can select more than one option), rankings, and open-ended questions. You can also insert pictures or documents that you want respondents to review and respond to. Depending on your purpose for distributing the survey, you should **think carefully about which question types to use** and how many questions to send.

Most surveys are fairly easy to complete, especially if users have a basic level of computer literacy and experience using the internet. As shared in the nondigital tools section, if you decide to deliver a survey on paper or over the phone, we recommend that you enter the responses into any online survey you also fielded so that all of the responses are in one place.

Also, **many survey platforms have basic data analysis capabilities**, which can be very helpful for understanding responses in aggregate. For example, the analysis could tell you what percentage of respondents answered a certain way on a multiple-choice question. Of course, it cannot analyze responses to open-ended questions, so keep that limitation in mind when deciding what type of questions to ask.

Potential challenges to consider: Survey design, especially for data collection, is a true science. Before fielding a survey, it might be helpful to offer a basic training on survey design or to consult best practices. For example, surveys are best with fewer questions (which encourages higher response rates), with questions that aren't leading, and with a disclaimer about how the data are being used.

Be careful not to **extrapolate beyond what the data are telling you**. For example, if only 20 people complete your survey, it might not be fair to say these responses are *representative of your community*. Any presentation of the survey data should clearly state how many people completed the survey and try to delineate the demographics of those who answered.

Pricing: Qualtrics requires a paid account. Survey Monkey can be used for free with limited functionality; paying for an account allows for more options and data analysis. Google Forms is free to use with a Google account.

Best Practices for All Community Engagement

Now that we've shared examples of nondigital and digital tools for engagement and discussed some of the ways they can be used, we also offer some best practices and tips for any form of engagement.

Worksheet 4 at the end of this guide can help you to apply these practices to planning a community engagement activity.

1. **Manage your team's engagement expectations.**

Communities are faring unpredictably during the pandemic, so people may have varying abilities to participate in both nondigital and digital engagements. Organizations seeking to engage communities right now may need to reflect on what they are able to accomplish with already-available or internal information and on what can and cannot be advanced with reasonable community input. Be clear about what equity challenges were already present and/or are exacerbated by the pandemic, and consider what groups may or may not be a part of the conversation right now and how to mitigate any exclusion. Going through the questions from the "Is Now the Right Time for Community Engagement?" section (which are also available in Worksheet 1) is a great way to begin to understand and manage your expectations.

2. **Understand the capacities and benefits of various platforms and tools.**

Some engagements can be short and quick; others should be longer, more sustained engagements that build over time. Using polling features on social media and webinar software or sending out a short survey can be good ways to get a small amount of feedback quickly. On Facebook, for example, when someone requests to join a group you administrate, you can ask them up to three questions as part of that request. Similarly, Zoom has a polling function that can be used to poll meeting attendees. This can be a good way to quickly gather some data. If you don't use Facebook or Zoom, check whether your platform has a polling function you can use to collect some initial data about people who come to the site or meeting.

If you plan for when and how often to use these functions, you can use several smaller engagements to build one larger idea-generating activity. You can also combine many small engagements with various groups of people to get a more representative picture of what the community wants. For example, you could send out an electronic survey using a platform such as Survey Monkey to audiences likely to engage online and use physical mail to send paper surveys to those with limited or no access to computers or the internet. Once you receive the paper surveys back, you can manually enter the data into Survey Monkey so all the responses are stored in one place. If you have a project website, videos can also be a useful way to remind participants that there are real people behind the work and to introduce them to different members of the team. Consider posting a weekly video update on where the project is. This lets community members know that the project is moving forward even if they can't see the physical impacts of the work being done.

3. **Remember that users have various levels of familiarity and comfort with different platforms, and build in time for training and practice.**

Several of the tools suggested previously may be new for some community members. This doesn't mean that they absolutely should not be used; rather, you may need to build in time to provide lessons on how to use them and to give people time to practice using them before the actual engagement exercise begins. Many digital platforms offer tutorial videos to help new users, or you could develop a training of your own that is more tailored to how you want to use a specific tool.

4. Consider compensating community members for their participation, and plan for this in your budget.

Participating in community engagement activities takes time and energy. Paying people to participate shows that you value their time and ideas and understand that they may have other needs that must be met. In-person community engagement activities often provide accommodations such as transportation passes, child care, and meals. Although you won't need to offer these things for remote engagements, you might consider thanking people for their time by offering gift cards or cash compensation for people who take surveys or paying people a full hourly wage if they participate in more in-depth engagements such as webinars, focus groups, or online project-planning exercises.

5. Think about timing.

Conducting calls, facilitating project planning exercises, or hosting webinars during the daytime reach some populations well, especially because some people are not working or have flexible hours. But others may have taken on additional caretaking or schooling responsibilities or have jobs with evening and weekend hours. More-flexible engagement methods that can be completed whenever a community member has time (such as mailed or online surveys) might be better to reach these groups.

6. Make a good first impression.

Starting your project off on the right foot is key if you want to have a successful engagement. You should plan to start with a clear welcome message to the project and a succinct description of what you're hoping to accomplish through the engagement. You might consider using a video to welcome members to the platform or displaying a bright, visually attractive flyer with basic information about your project and a link to a page where they learn more. All your materials should be well-designed and welcoming. If people don't like what they see right away, they won't come back again or won't open future mail.

If you're conducting an online focus group or a webinar, think about fun icebreakers you can use to make the routine more enjoyable. People are on a lot of online calls these days, so anything you can do to make yours exciting and different can go a long way toward helping people remember your initiative. For example, you could ask people to do a quick drawing and share it on the video, or to share their "quarantine hobby." If you're using surveys to do outreach, carefully consider the number and types of questions you ask. If people see too many questions or very personal questions, they may not want to respond and could be discouraged from responding to future outreach.

7. Make time for community members to get to know one another in addition to getting to know your organization.

As mentioned, building social capital among community members is an important goal of community engagement. Especially as many people adhere to social distancing guidelines and limit their social interaction, making time for community members to get to know one another can be an important goal in itself. If you're able, build in time during online engagement sessions for fun activities or small-group discussions. You can even organize people into groups of two or three for some icebreaker games or match community members for phone calls or Zoom calls where they get to meet someone new in their neighborhood.

8. Report back.

After engaging with community members, come back to them later and share what action has been taken since you last spoke. These interactions should not be purely extractive: you want

to be able to show that you've gathered their insights and ideas and are putting them to use. For example, you might end your call with, "Thank you for sharing your thoughts and ideas with me today, would you mind if I called you back later to share some updates?" If you're conducting a survey, you might consider sharing a brief report with the respondents that contains the aggregated survey response data.

Sample Engagement Methods

Below are three examples of remote community engagement activities. For each example, we provide a brief overview of the activity, share a real-world example of its use, list the basic steps for its implementation, and share some considerations for when it might be most useful within a larger project-planning strategy.

Example 1: Crowdsourcing

Crowdsourcing is a term first used by *Wired* magazine writer Jeff Howe. It describes a “new web-based business model that harnesses the creative solutions of a distributed network of individuals through what amounts to an open call for proposals” (Brabham 2008). It is similar other engagement activities (such as participatory budgeting) that allow residents to develop and present ideas for projects. However, it is web based rather than in person.

Proponents of the crowdsourcing process say its largest benefits are that it is more anonymous and minimizes any interpersonal or identity-based power dynamics. Moreover, people who want to participate in the public decisionmaking process but who are unable to attend because of time constraints or financial ability may find the online format especially appealing. Crowdsourcing advocates also posit that because the internet is the primary source of information and knowledge in today’s world, it can also be a venue for public decisions.

As one example, the [City of Syracuse Innovation Team](#) invited Syracuse residents to submit ideas online of challenges they wanted the mayor to fix and held a two-week period where residents could vote on their favorite ideas. The topics that gathered the most votes were reviewed by the mayor for consideration.

Although each locality or organization must determine what its crowdsourcing process will look like, there are several steps traditionally used in the process (adapted from Brabham 2008, 252–55), such as the following:

- **Create or select a web platform:** Organizations should create an easily accessible and useable website that can facilitate the subsequent steps. The website should be user friendly and be translated into any languages spoken by members of that community.
- **Clarify your problem:** Unlike other methods mentioned, crowdsourcing doesn’t need to be used exclusively for developing new ideas or projects; rather, it can be used to get the public to reflect and discuss already-proposed developments.

- **Provide the public with necessary data and tools:** The public must be provided all the information it needs to make an informed decision. This includes charts, maps, budgets, developer proposals, and demographic information on the affected community. This information should be presented in a format that is as accessible to a layperson as possible. And depending on what the problem is, you may need to provide templates so participants have an easy way to develop proposals.
- **Call for ideas:** Make an announcement calling for solutions to the proposed problem. Facilitators might also incentivize residents to participate with prizes.
- **Establish a comment period:** After the deadline has passed to submit ideas, establish a designated comment period during which community members can go online and offer feedback on the proposed ideas.
- **Create a determination process:** After the comment period ends, the hosting organization must determine whether to allow the public to vote on the proposed ideas or whether the hosting organization will ultimately decide what ideas will be implemented. Participation experts suggest that the planning team use the top few vote-getting designs as an advisory element in the design of the actual plan.

Timing Considerations: Crowdsourcing is best used as a tool to generate ideas, but it can also be used later in the planning and implementation stages to solicit feedback on how things are going.

Example 2: Ecosystem Mapping

Understanding the social connections in a community can be valuable to identify who holds power, how people to connect with one another, what resources are available, and where people gather. These social connections can be considered an ecosystem. Ecosystems can be defined as “dynamic networks that emerge through connections between many actors” (Arena and Li 2018). To better identify, support, and leverage local connections, organizations may use ecosystem mapping to visualize existing networks and understand how organizations or community members interact with one another (Arena and Li 2018). This process can be especially helpful for identifying social dynamics in a specific place or on a given topic, and it can be used for any type of ecosystem or network.

An important first step is outlining the purpose of your ecosystem mapping. What do you hope to gain from the process? Ecosystem mapping can produce a static, point-in-time map that can help convey the interconnections between organizations. It can also be more iterative and document a

network's change over time. The mapping process could also be a valuable exercise in itself and might foster new connections and conversations.

In 2018, for example, the [Civic Tech and Data Collaborative](#), a group of three national organizations with local networks (Living Cities, Code for America, and the Urban Institute's National Neighborhood Indicators Partnership) supported a project building local civic technology and data ecosystems. This group of local government officials, civic technologists, and data intermediaries across seven communities explored ways to harness data and technology to benefit residents with limited economic resources. They used ecosystem mapping to diagram, understand, and better support their local data and technology networks. From this work, they developed [an ecosystem mapping guide](#) to share specific lessons learned from their project (Arena and Li 2018). The lessons and questions presented can be adapted for any group of people or organizations.

The ecosystem mapping guide provides suggestions, crucial questions, and examples for each step of the mapping process. The document includes the following sections:

- Key Questions to Ask before Getting Started
- Decide What Data to Collect
- Choose a Data Collection Methodology and Mapping Software
- Analyze Your Ecosystem Map

The guide also contains an appendix that weighs the benefits and drawbacks of specific digital ecosystem mapping and visualization tools. Some important considerations covered in the guide are as follows:

- **What is the purpose?** Establishing a clear goal can help guide and direct your efforts. What are you hoping to learn from an ecosystem map?
- **What is the scope?** Because many organizations working on cross-sector issues have vast and diverse ecosystems of partners and collaborators, understanding the scope of mapping is crucial to keeping your project manageable. Ecosystem mapping can quickly evolve and become unwieldy. Try to define a specific scope, such as connections within a single project, sector, or geography.
- **What is the budget and timeline?** As you continue to have conversations and learn more about networks, your mapping process may require more time and energy. Be mindful about budget and timeline requirements.
- **What data should you collect?** More than just identifying connections, ecosystem mapping can help reveal patterns in *how* organizations or stakeholders interact. Collecting information

on funding streams, partnerships, locations, resources, or events can help add more color and detail to your network map.

- **How do you go about collecting data?** Once you've identified what you want to learn and set parameters around your project, you can decide how you want to collect information. You may have access to an existing database of contacts, which could generate an initial map to prompt additional conversations. You could also use more-intensive information-gathering methods. You can hold a virtual group brainstorm of connections or ask individual partners to draft maps with pen and paper and send photos to you. Once you have the inputs, you may find that many online software options are available for visualizing your data. Some tools require manual input; others allow you to upload an Excel document.
- **How do you analyze your ecosystem map?** Once you generate an initial map, conversations do not have to stop. Reflecting on what is shown in the ecosystem map may prompt additional discussions and foster new conversations.

Ultimately, ecosystem mapping lends itself well to virtual engagement. Mapping can be done over the phone or by video conference. It can be completed in conversation with partners or they can complete it on their own time using a predesigned template. These data can then be entered into software and visualized. To continue gathering input, initial maps can be discussed in future conversations or interviews. Because networks continue to evolve and change, ecosystem mapping can be iterative, and maps can show the change over time.

Timing Considerations: Ecosystem mapping can be used at various stages of a project. It can be implemented in the initial stages to get a sense of how organizations are connected to one another or in the final stages of a project to understand the impact or reach of a specific program or project. Because ecosystems change, the mapping process can be iterative and show the change in a network over time.

Example 3: Data Walks

One strategy that the Urban Institute uses to increase community engagement in the research process is hosting [Data Walks](#) (Murray, Falkenburger, and Saxena 2015). A Data Walk is an event where researchers gather with community members to share information, get feedback on initial findings, and identify gaps for additional or future research.

Data are printed on large posters that are placed around the room, and participants move from station to station to read and leave feedback on posters. Researchers may guide participants through or be stationed at each poster to answer questions or guide discussions. Absent in-person meetings, Data Walks can be carried out by breaking participants into small groups on virtual meeting platforms and having a facilitator share the poster with the participants on his or her screen. (See the next section for more information on hosting a virtual Data Walk.) Researchers from a recent project that used Data Walks described them as a tool for a more “equitable research process by checking researchers’ initial conclusions and creating a feedback loop of challenges and solutions with communities.”⁵ These events focus on data sharing as the platform for collaboration and can be used regardless of whether a community has been engaged from the beginning. According to an initial guide to Data Walks published by the Urban Institute, the goals of a Data Walk include

- “to share key data and findings with community residents and program participants;
- to ensure a more robust analysis and understanding of the data;
- to help inform better programming and policies to address both the strengths and the needs of a particular community or population; and
- to inspire individual and collective action among community agents” (Murray, Falkenburger, and Saxena 2015).

It is important that researchers from outside the community work with a local organization that can provide context and communicate concerns or considerations from community members. When planning the content of a Data Walk, researchers or program implementers should tailor posters or slides based on the recommendations of local experts. Additionally, community-based organizations can support outreach around the event, serving as a trusted voice for community members. The community organization should be clear about their relationship to Data Walk participants as well as the research goals, limitations of the work, and parameters for the conversation. Part of being transparent and honest in community conversations is being clear about what information is being collected; how it will be used; and any risks, benefits, and privacy concerns. This information would ideally be communicated in the initial outreach around the event.

In pulling together content for the Data Walk, organizers should focus on a specific purpose for the Data Walk. Revisiting your initial goals in hosting a Data Walk will help guide what format would be best. Are you looking to have a broader conversation about challenges or opportunities? Or are you looking to validate the data gathered? What information do researchers hope to share? What feedback do they hope to receive? For example, for a project on food insecurity, researchers held Data Walks with members of six communities across the US to “elicit feedback on our food insecurity data, provide on-the-ground context for the data, and brainstorm strategies for addressing challenges

represented in the data.”⁶ Each of the posters included data on a different facet of food insecurity’s root causes, its effects on communities, and current local approaches to addressing it. Data included the average number of hours needed to work to afford rent, racial disparities in income, and the number of community members accessing federal food benefits.

Data Walks are typically done in person, but given the pandemic, a group could imagine ways to host virtual Data Walks through recorded videos or virtual meetings. But remember that some community members may not have digital connectivity to participate in a Data Walk. Some ideas for a virtual Data Walk format would have researchers or program implementers digitally presenting presentation slides (“posters”) and prompting conversation about data. Organizers would need to think about how to facilitate a thoughtful virtual dialogue to make sure participants feel safe giving their reactions. For example, you could break participants into smaller “breakout” groups to discuss or provide opportunities for people to share insights privately (perhaps in a survey) if they don’t feel like sharing some things in a group. Alternatively, presenters may record a short video walking through a poster and then ask for responses at a later point to relieve the burden of answering or discussing reactions in real time. One step further removed would be to send local stakeholders presentation slides “posters” and ask for feedback through email or a phone call. While this removes some of the collaborative conversations that come out of a Data Walk or focus group, it can still be an opportunity to present data to a wider audience and gauge initial reactions to research questions.

Because a virtual format can create additional barriers for community engagement, researchers or practitioners using this method must clearly state the limitations or benefits of virtual engagement. These mediums may offer more privacy (as participants can decline to share a screen or use a different name to log into a meeting), but they also limit ability to read body language and guide conversation. Identifying these potential risks and benefits will ensure all participants enter the conversation with shared expectations.

Timing Considerations: Like ecosystem mapping, hosting a Data Walk can be a useful tool for engagement at several stages of a project. It could help participants get a sense of what challenges a community is facing and guide the development of a project or research agenda, or it could help the hosts report on data gathered from previous research exercises. Because Data Walks are opportunities to learn new information, they should not be a final presentation. Hosts should have an avenue to incorporate what they learn from the Data Walk back into their research or reports—researchers asking for feedback should have an intention of using that feedback.

Conclusion

Although hosting community engagement activities during a pandemic might seem a daunting task, remember the value these types of engagements can bring, especially when so many people's social circles have gotten much smaller and people may feel disconnected from their usual supportive services and networks. Community engagement can create connections between strangers; build social capital and support networks; and help shape programs, policies, and organizations that are doing critical work during this time. With the right intentions, the right tools, and everyone's voices, community engagement can help ensure no one is left behind during the pandemic.

Worksheet 1: Assess the Community's Readiness for Community Engagement

1. What are we hoping to achieve through community engagement? When we receive that input, will we be able to act on it?
2. Is it critical that we collect this input right now? Could some input gathering be postponed one week? One month? Several months? How will postponing engagements affect the long-term project goals?
3. Do the engagements we want to host and the questions we want to ask reflect the current situation? How can we adapt our questions to acknowledge what is going on and offer space for community members to talk about how they're doing during this pandemic?
4. Will anyone respond to our questions right now?

5. Can we engage a representative sample of our community, or would we miss some people if we proceeded with engagement right now?

6. How will community members receive our request (i.e., will they be accommodating, frustrated, or bothered)?

7. Do we have mechanisms in place to avoid overburdening our community members with requests for input? (Answering this question will require an awareness of what other outreach community groups are doing and of what resources and budget are available.)

8. Are there other things we can be doing now to advance our goals or support community members that don't involve hosting community engagement events or conducting surveys? If so, are these options we can easily implement and that fit within our budget and capabilities?

Worksheet 2: Draft Your Logic Model

According to the Centers for Disease Control and Prevention, a logic model is a “graphic depiction (road map) that presents the shared relationships among the resources, activities, outputs, outcomes, and impact for your program or engagement strategy. It depicts the relationship between your program’s activities and its intended effects.”⁷

Before you begin your engagement, you need to identify what impact you desire from the engagement. For example, are you trying to gather a representative collection of ideas to inform your project? Are you trying to solicit input on an already crafted plan? Are you hoping to build a shared sense of collective efficacy or create a community identity? Are you trying to understand who “the community” is? Each of these goals will require different inputs and activities, so think carefully about what your goal is.

To build your logic model, start with your desired impacts and work backward toward inputs (right to left in the diagram below). Here is an example of a basic logic model template:

Inputs	Activities	Partners or participation	Outputs	Outcomes (short term)	Desired impacts (long term)

Worksheet 3: Complete the Strategy Triage Tool

Once you've completed your logic model and know what steps you want to take to reach your desired impacts, you may also consider completing the [Strategy Triage Tool](#). This tool was developed by Marian Urquilla of StrategyLift and is designed to help community-based organizations prioritize what they can and should do now, while the COVID-19 pandemic is still in full effect, and what they should delay until more normal routines resume.

A key feature to highlight from the Strategy Triage Tool is the box on emerging priorities. Because of the pandemic, community-based organizations may have new ways to demonstrate their support. Some of these new opportunities may go beyond the original scope of the project, but choosing to implement them could have positive outcomes that will support the project's long-term goals. For example, while operating a food drive may not be part of your team's current community engagement plan, it could be a good way to introduce your team to the community and demonstrate your interest in supporting community health and well-being.

What is our guiding question? (What will it take to...?)	
Current priorities that are still relevant and continue forward (with modified approach)	Strategies we pause and resume when crisis is "over"
Emerging priorities or existing priorities that we will newly prioritize (because of current conditions)	Priorities with an unknown status or approach (need more data, too much in flux)
Priorities we will honor and let go (i.e., not going to happen)	

Source: The Strategy Triage Tool was developed by Marian Urquilla of StrategyLift. It has been reproduced here with her permission. To access the full tool in its original format please go to <https://centerforcommunityinvestment.org/blog/reimagining-strategy-context-covid-19-crisis-triage-tool>.

Worksheet 4: Plan for Your Community Engagement

Step 1: Manage your team's engagement expectations.

Answer the questions in Worksheet 1 with your team.

Step 2: Understand the capacities and benefits of various platforms and tools.

Referring to the sections on Tools for Engagement and Sample Engagement Methods, discuss with your team what tools, methods or platforms will best facilitate your outreach to the community you serve.

Step 3: Select the tool or platform you will use, then answer the questions below to identify which community members will be *easiest* to reach with this tool, which will be *more difficult* to reach, and how you will supplement the use of this tool or platform to reach everyone you desire to reach.

- a. Tool or Platform Selected:
- b. Goal (circle one): Inform Consult Involve Collaborate Empower
- c. Which community members will be easiest to reach/engage with this tool?

- d. Which community members will be more difficult to reach?

- e. How will we supplement the use of this tool with another tool, platform, or method to ensure that we reach everyone we want to reach? Should we partner with another organization to help reach certain group? If yes, what organization(s)?

Step 4: If necessary, develop a training or tutorial for users who may be unfamiliar with this tool or platform. Make sure to build in adequate time for community members to become comfortable with this tool before they are asked to begin using it.

Step 5: Decide whether you will compensate community members for their time or provide other incentives to participate. Use the space below to make notes about how you might compensate community members for their participation and don't forget to include these costs in your project budget!

Step 6: Determine the timing of your engagement activity and whether or not you will conduct it multiple times to reach a broader audience of community members. Answer the questions below about the timing of your engagement.

- a. What day and time will you conduct your engagement?
- b. Which community members are likely to be able to attend during this time (i.e. seniors, people who work in the evening, etc.)?
- c. Which community members are *unlikely* to be able to attend during this time?
- d. Will you offer the same engagement at another time(s) to reach people who are unlikely to be able to attend the first time slot?

Step 7: Plan how you will open the engagement and introduce your organization and the purpose for your outreach. Use the space below to jot down a few notes on things you want to mention as part of this introduction. Be sure to include how you will acknowledge the pandemic or other hardships your community members may be facing during this time.

Step 8: If applicable, determine what kinds of activities or icebreakers you will do as part of your community engagement or how often you will make time for community members to get to know one another within your engagement activities. Use the space below to take notes on what types of icebreakers or breakout sessions you will do, and how you will encourage relationship building.

Step 9: After your engagement activity/activities are completed, discuss with your team how you will report back to those who participated and to the overall community on what was gained from the engagement. Use the questions below to guide your report out.

- a. In what format will you report back to community members (i.e. individual thank you calls, a report, a blog, a video)?
- b. What are the main points you want to report back on from the engagement? Include what was learned and also what your organization will do as a result of what you learned.
- c. What resources do you want to share with people who participated or with the general community?
- d. Will you make any follow up requests from them as part of this reporting (i.e. share information about us with your friends, participate in another community engagement next months, etc.)? If yes, what?

Appendix: Additional Community Engagement Resources

Community Engagement Guide

King County, Washington, 2011.

https://www.kingcounty.gov/exec/equity/~/_media/5CCCBCFFBA8F405191A93BBD5F448CBE.ashx.

The Community Engagement Guide for Sustainable Communities (Danielle Bergstrom, Kalima Rose, Jillian Olinger, and Kip Holley)

PolicyLink, 2012. <https://www.policylink.org/resources-tools/community-engagement-guide-for-sustainable-communities>.

Community Engagement Resource Guide: Creating Equitable Access to High-Performing Parks

National Recreation and Park Association. <https://www.nrpa.org/publications-research/best-practice-resources/community-engagement-resource-guide/>.

COVID-19 Public Participation Resources: Overcoming Challenges in Crisis

International Association for Public Participation. <https://iap2usa.org/COVID-19-P2-Resources>.

A Guide to Community-Centered Engagement in the District of Columbia

Georgetown Climate Center, 2018. https://www.georgetownclimate.org/files/report/community-engagement-guide_10.05.18_web.pdf.

Guide: How to Approach Digital-First Community Engagement

Bang the Table. <https://www.bangthetable.com/blog/how-to-approach-digital-first-community-engagement/>.

How to Build and Maintain an Engaged Online Community (Stephanie Baiocchi)

ImpactBND, July 23, 2018, <https://www.impactbnd.com/blog/how-to-build-and-maintain-an-engaged-online-community>.

Index of Community Engagement Techniques

Tamarack Institute. <https://www.tamarackcommunity.ca/library/index-of-community-engagement-techniques>.

The Principles for Equitable and Inclusive Civic Engagement: A Guide for Transformative Change (Kip Holley)

Ohio State University Kirwan Institute, 2016. <http://kirwaninstitute.osu.edu/wp-content/uploads/2016/05/ki-civic-engagement.pdf>.

Reimagining Strategy in the Context of the COVID-19 Crisis: A Triage Tool (Marian Urquilla)

Center for Community Investment. <https://centerforcommunityinvestment.org/blog/reimagining-strategy-context-covid-19-crisis-triage-tool>.

Trauma-Informed Community-Building and Engagement (Elsa Falkenburger, Olivia Arena, and Jessica Wolin)

Washington, DC: Urban Institute, 2018. <https://www.urban.org/research/publication/trauma-informed-community-building-and-engagement>

Why am I Always Being Researched?

Chicago Beyond, 2019. <https://chicagobeyond.org/researchequity/>.

Notes

- ¹ “Resident-Centered Community Building: What Makes it Different?” Aspen Institute and Jacobs Center for Neighborhood Innovation, May 13, 2012, <https://www.aspeninstitute.org/publications/resident-centered-community-building-what-makes-it-different/>.
- ² Marian Urquilla, “Reimagining Strategy in the Context of the COVID-19 Crisis: A Triage Tool,” Center for Community Investment, March 31, 2020, <https://centerforcommunityinvestment.org/blog/reimagining-strategy-context-covid-19-crisis-triage-tool>.
- ³ “How to Build a Phone Tree,” American Association of University Women, accessed August 18, 2020, <https://ww3.aauw.org/resource/how-to-build-a-phone-tree/>.
- ⁴ Martha Fedorowicz and Elsa Falkenburger, “Pivoting Community Engagement during COVID-19,” *Data@Urban*, May 21, 2020, https://medium.com/@urban_institute/pivoting-community-engagement-during-covid-19-4f45efe7d546.
- ⁵ Clare Salerno and Olivia Arena, “Using Data Walks to Spur Community Conversations around the Realities of Food Insecurity,” *Urban Wire*, December 18, 2019.
- ⁶ Salerno and Arena, “Using Data Walks.”
- ⁷ “Logic Models,” Centers for Disease Control and Prevention: Program Performance and Evaluation Office, accessed April 8, 2020, <https://www.cdc.gov/eval/logicmodels/index.htm>.

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- Brabham, Daren C. 2008. "Crowdsourcing as a Model for Problem Solving: An Introduction and Cases." *Convergence* 14 (1): 75–90.
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About the Author

Martha Fedorowicz is a policy analyst in the Research to Action Lab at the Urban Institute, where she works with local government agencies, philanthropic organizations, and nonprofits to deliver technical assistance and translate research into practical tools for policymakers. Before joining Urban, Fedorowicz was a special projects administrator with the City of Lansing's Department of Neighborhoods and Citizen Engagement and a summer policy associate in the City of Detroit's Department of Neighborhoods. A recent graduate of the University of Michigan's Gerald R. Ford School of Public Policy, she specialized in neighborhood development, local government innovation, civic engagement, and housing policy. Fedorowicz has a BA in political science and French from the University of Michigan and served as a youth development Peace Corps volunteer in Morocco from 2012 to 2014.

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500 L'Enfant Plaza SW
Washington, DC 20024

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