



Equitable Community Engagement Guide

2020-2023

Table of Contents

Worksheet 1: Purpose & Outcomes	1
Worksheet 2: Team Readiness.....	2
Worksheet 3: Identify Community Stakeholders	3
Worksheet 4: Determine Level of Engagement.....	4
Worksheet 5: Engagement Methods & Develop Communication Plan	5
Worksheet 6: Design Data Collection Plan.....	6
Worksheet 7: Develop Evaluation Tools	7
Worksheet 8: Report Back and Stay Connected.....	8
Resource 1: Common Barriers to Participation.....	10
Resource 2: Facilitating for Equity and Inclusion	12
Resource 3: Sample Engagement Plan	13
Resource 4: Virtual Event Planning Checklist & Sample Agenda.....	14
Resource 5: Group Charter Template	16
Resource 6: Sample Memorandum of Agreement	17
Resource 7: Sample Evaluation Form & Question Bank	18
Resource 8: Sample Community Engagement Summary Infographic	19

This is an equitable engagement guide.

The goal is to identify community assets and offer transparency throughout an engagement effort.

ODOT project teams must complete as much information as an individual or as a small team before contacting and/or sharing this information with partners, including but not limited to contractors, consultants, inter agency partners, stakeholders, or anyone that is not involved initial research and plannings, etc.

This ensures the project team has clarified, entered, and verified as much information as possible prior to addressing gaps, barriers, or opportunities with partners.

Do not attempt to print this document.

It is designed for online interaction.

Work through this document with your project team, and save it to refer to later.

Purpose & Outcomes

Use this worksheet to:

Thoughtfully work through the purpose and goals of the project with your team.

- Identify who is affected by the project on the Social Equity Index Map.
- Determine timelines and if the activity qualifies for EECP.
- Clarify project purpose and projected outcomes.
- Set milestone markers on your timeline to eventually share with the community.

Purpose

Determine the reason for this project or program, and community activity.

What is the purpose of this **project or program**?

What is the purpose of the **community activity**?

(Fact finding, program development, issue identification and shared decision making to address emerging issues, etc.)

Outcomes

What outcomes need to be met for this project to be successful?

What is the project **timeline**?

Indicate at which points community members will be involved and articulate which sections of the project they can impact or shift project decisions-making.

Project/Program Name:

Project/Program Team Members:

Population

Determine in advance who is engaged in the process.

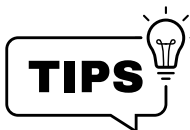
When considering community impact, what are the specific geographic boundaries of the project area?

What virtual elements should be considered for outreach to specific communities?

(i.e. needs for computer access)

What input is needed from community members for project outcomes to be successful?

What investments is the project team making to ensure community inclusion will happen in beyond this project?



This work will evolve as more individuals and organizations determine their roles and find value in the engagement activity.

Equitable Engagement Compensation Program and Policy (EECP)

Determine the engagement activities eligibility.

Does your engagement activity qualify for the [EECP](#)?

Yes No

Have you adjusted your project budget to reflect anticipated EECP engagement?

Yes No

Social Equity Index Map

Where does your project land on the [Social Equity Index Map](#)?

What does the map detail about your project area?

What CBO's (link to CBO site) do we already know about that exist in this project area and which populations do they serve?

What role do you want engaged populations to play in the engagement process?

Help with outreach; help build trust amongst community; be torch bearers and information points of contact; etc

Team Readiness

Use this worksheet to:

- Figure out if the information and actions you have planned have considered social equity.
- Do these exercises before you engage with any community member or organization.
- Your answers will advise your project community plan.

Social Equity Lens Questions

Before Project begins: Answer these four [Social Equity Lens](#) questions with your project team.

1. How will historically excluded communities be informed, consulted, or involved? What methods or tools are you using for engagement? Be specific.

2. How does this (project/engagement/activity/etc.) address the needs expressed by historically excluded communities? What are the benefits and burdens to those communities?

3. Does this affect a high social equity index area? If so, is there an opportunity to address economic or health disparities this community experiences?

4. Is there an opportunity in your work to increase safety and/or access for historically excluded communities that are not directly addressed by the project's purpose?

Before Project Begins

How have taken the answers from the Social Equity Lens and implemented them within your team and consultant's work?

Which CBOs are included in the planning of engagement with impacted areas populations?

Yes No

If not, what is needed?

When, where, and how will you share with the community the project timeline and at which points they will be involved in the planning and decision making process?

Who will help you build trust with community members? What is the plan?

During Project Process

Engagement Activity: Does this engagement activity include the diversity of the population in this project area at both the planning and outreach table (age, race, Ethnicity, ability, language, income, geographic representation, etc.)?

Yes No

How are you ensuring the information collected from this project team's work is documented and shared outside of this team, in order of reducing silos and fragmentation of information within your office or department?

How does your team plan to address and respond to harms done by ODOT in the past, specifically when asked directly about those harms?

Identify Community Stakeholders

Use this worksheet to:

- Invite specific stakeholders to engage and/or participate in the planning of the engagement.
- Confirm that the marginalized groups most affected by the project or program are able to participate.
- Coordinate engagement efforts and reduce duplication of the engagement process across ODOT.
- Use the equity lens to identify who may be at risk for exclusion, why, and what can be done to ensure inclusion.

Primary Stakeholders

Defined as: Community members who may be directly affected.

Who may benefit from the project/ program decisions or outcome?

Who may be burdened or negatively affected by the decisions or outcomes associated with the program/project?

Specify the following above: Cost Time Scope

Other:

List who in this community may be **least informed** and **most informed, vocal, or actively involved** in the project process? Use the information as a starting point to identify community based organization gaps.

What barriers may prevent stakeholders from participating? (Technology, timing, access, etc.) How do we alleviate these barriers?

Secondary Stakeholders

Agencies or organizations who may be indirectly affected or have a direct relationship with primary stakeholders.

What agencies, departments, community-based organizations, mobilizing organizations, or nontraditional partners are already organizing around the project or program we are addressing?

Talk to current partners about who isn't involved and should be.

What community-based organizations, groups, or individuals do marginalized groups respect and trust in the project/program area? We are looking at all community groups, but we need to prioritize the marginalized groups first. Here's [Why](#).

How does this engagement project or program align with other past or present ODOT initiatives?

Key Stakeholders

Defined as: Political or organizational leaders with the greatest influence or power over a decision.

What is the political or legal landscape around the project or program at ODOT and how can we adjust?

What is the political or legal landscape around the project or program in this community (specifically concerning community leaders and elected officials)?

Which community leaders or media should we connect with prior to engaging with the general community? Clarify this with Public Information Officers to ensure we are equitable and inclusive.



Refer to the Community-Based Organization List in [Office of Social Equity Engagement Page](#) to build a stakeholder list.

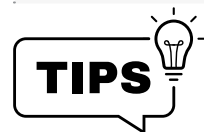
Determine Level of Engagement

Use this worksheet to:

With selected community leaders:

- Create a timeline for when each level of engagement will be implemented.
- Communicate the anticipated value to community members prior to, during, and after completion of the project/program.

Select levels of engagement to be implemented	Inform	Consult	Involve	Collaborate	Empower
Promise to the public	Share information, listen for understanding, and answer questions for clarity.	Two-way communication to obtain feedback on existing issues, projects, processes, or ideas.	Partner in each aspect of decision-making, including development of alternatives and identification of preferred solutions.	Place final decision-making in the control of the community.	Support the priorities and ideas identified and led by the community.
What it means	Providing communities with balanced information to assist in understanding issues, opportunities, alternatives, and potential solutions.	Informing communities of issues or decisions that need to be made, obtain their feedback, and report back on how their input helped shape decisions.	Establishing shared decision-making roles with community and committing to work together to identify issues, joint projects, and solutions.	Guiding and providing sufficient resources to communities, so they can lead the development and implementation of strategies, projects, and public policies.	When invited to partner, ODOT will support community-identified public health or city issues, plans, strategies, and public policies based on availability of ODOT resources and capacity.
What it looks like in practice	Announcement of project or programs with information on dates, websites or surveys.	Collect and use feedback from key informants, staff, and community residents to project plans.	Partner with CBOs, to produce the Community Needs Assessment.	CBOs determine how to allocate funds from the ODOT budget through participatory budgeting.	
Anticipated value for the community	Understand the project and program, and how to protect self, families and community.	Strengthened ODOT programs and services to address issues in Oregon, such as homelessness and opioid use.	Funded projects that create long-term positive change in the city.	Coordinated community-based. Programming implemented through a Community Improvement Plan.	
Data requested from the community	Communities receive information without expectation of two-way communication. Communicators prepare to respond to questions, concerns, and suggestions.	What are the top 3 priorities you believe should be addressed in the new strategic plan? What would you like to see ODOT look like in the future?	What are the most important concerns in your community that affect transportation? What are the strengths of your community?	How would you spend public funds in your neighborhood? What project is most important to you?	



The Community Engagement Spectrum is flexible and multi-directional; therefore, the use of different levels of this spectrum may be required.

Engagement Methods & Develop Communication Plan

Use this worksheet to:

- Determine the most appropriate engagement method; multiple methods may be required.
- Develop a communication plan to reach and engage stakeholders throughout the engagement process.
- If this project is high profile, send draft communication materials that carry the ODOT logo to the Communication Office for review.

Example Engagement Methods

How are you going to reach the community?
(Hold Ctrl to select more than one option.)

Inform Other

Consult Other

Involve Other

Collaborate Other

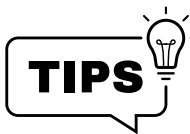
Empower Other

Communication Plan

Every engagement method requires a communications plan. This should be replicated based on the specific stakeholder and evolve over the course of the project or program timeline. Work with a community lead or liaison to answer these questions and determine a plan of action.

Stakeholders

Timing	Key Message	Communication Channels <i>Specify language preferences and location of interaction priorities.</i>	Lead on Delivery of Message <i>Specify level of engagement and clarify the community participant(s) role for accountability.</i>	Frequency and Adjustments
Before Engagement				
During Engagement				
After Engagement				



Communication is important throughout the process; at the onset to get stakeholders interested, during the process to provide updates on progress, and at the end to describe the difference the process made.

The key message should be persuasive, easy to remember, and align with what stakeholder's care about; ensure stakeholders understand what is being asked of them and the benefits of getting involved.

Design Data Collection Plan

Use this worksheet to:

- Define what information is needed on the project or program from stakeholders.
- Determine what questions to ask stakeholders and how information will be collected at engagement.
- Establish with project/program team how the information collected will be analyzed and reviewed by stakeholders.
- This can be an iterative process. Specifically when collecting information throughout the stages of a project as we may not know most information needed up front.

Research

Who is this information for?

ODOT Project Team	Planning
OTC	Stakeholders

Other:

What information is needed to move the project or program forward equitably?

This may vary depending on who the information is for. Clarify the primary languages in the area, ADA requirements, racial and ethnic demographics, age and income levels of residents, community history with ODOT, previous and current projects in the area, and strengths of the community.

What information already exists?

Explore existing data collected in planning, on previous projects or programs, or identify offices or departments doing similar work and request information.

Collect

What new information can be provided by stakeholders?

Intentionally verify and update all stakeholder and community based organization information, including but not limited to: name, position, address, zip code, population served, services provided, etc.

What questions will be asked of stakeholders?

Connect with community leaders and liaisons to build questions. Collect both quantitative and qualitative data. Consider history and narrative stories.

How will the information be collected from stakeholders?

Follow up with [Office of Social Equity](#) for long form details.

Survey/Questionnaires	Diagramming
Key informant interviews	Ranking/Voting
Brainstorming	Asset mapping

Other:

Analyze

How will data collected from stakeholders be analyzed?

Intentionally involve the community early in the planning. Invite select members to the planning meeting and set expectations and a timeline for the project milestones and goals.

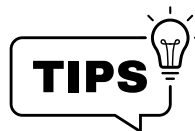
Who will be responsible for analyzing the data?

How will you involve the community in this process?

How will analyzed data be reviewed by stakeholders?

Before a final decision is made, check-in with stakeholders and ensure that analyzed data reflects their voice. Communicate a timeline for feedback and response.

Who will be responsible for sending analyzed data to stakeholders for review? And how will adjustments be made?



- Audit and consider consultants research collected on past projects and recent data, if applicable.
- No one data collection method fits all stakeholders. Use a combination of activities to listen to all perspectives and gather information from as many stakeholders as possible. Prioritize dialogue and interactivity.
- Ensure accurate and complete records are kept of all interactions and responses. Adhere to agreed-upon privacy of stakeholders involved.
- Sort group responses into categories to identify varying perspectives. Balance qualitative responses against other sources of evidence or research. Examine primary stakeholder viewpoints and consider implications for the decision or outcome. Identify trends, previously unknown information or new ideas that have been provided. Examine and justify any recommendations that cannot be pursued due to constraints (e.g. budget, political landscape).

Develop Evaluation Tools

Use this worksheet to:

- Create an evaluation tool to obtain feedback from participants on the engagement that aligns with the Community Engagement Principles.
- Each stage of the process should conduct an evaluation, unless this project will only exist within one team start to completion. Keep in mind project timeline.
- Create a self-assessment tool for the planning team to measure the implementation of the Community Engagement Principles.
- Refer to Resource 7: Sample Evaluation Form & Question Bank (pg. 16) for additional support.

	For Participants	For the Planning Team
	Evaluation Method:	Evaluation Method:
	Frequency:	Frequency:
Intentional Action	Evaluation Questions	
Accountable		
Collaborative		
Inclusive		
Sustainable		
Transparent		



Community engagement is an iterative process with many opportunities to learn and improve future engagement processes. Evaluation of the engagement plan keeps ODOT accountable to the community.

Report Back and Stay Connected

Use this worksheet to:

- Determine how the final engagement results will be summarized and reported back to stakeholders.
- Establish the appropriate methods and timelines for regular check-ins with stakeholders to use after the engagement ends.
- Identify a plan or resources to support stakeholders after the engagement process has ended.
- Refer to Resource 8: Sample Report Back Summary Infographic (pg. 17) for support.

Report back summary guide

List the engagement goals:

How was stakeholder input used to inform the final decision?

Indicate when there will be other times to provide feedback and coming dates, times, and locations.

Summarize what was heard from community members and leaders. Comments toward the project or program:

Describe participant demographics:

How will stakeholder feedback be collected?

Decide how information will be reported back to stakeholders:

Brainstorming
Infographic
Report
Other

Executive Summary
Presentation

State the final decision:

Stay Connected

List CBO partners in this area:

Staff responsible for staying connected to stakeholders:

ODOT contact:

Community partner contacts:

Opt-in/Opt-out follow up method:

Email/Phone
Social Media
Other

Newsletter
Community Event

Opt-in/Opt-out frequency timeline:

Monthly
Other

Weekly

Describe race/ethnicity of participants:

Support Stakeholders

- Connect stakeholders to funding opportunities at ODOT.
- Offer stakeholders ongoing training or technical assistance.
- Add stakeholder newsletters and social media to ODOT data banks.
- Promote stakeholder's work inside and outside of ODOT.

Resources Section

Common Barriers to Participation

Common barriers to participation	Potential solutions
<p>Government organizational structure and functions</p> <p><i>Stakeholders may be unfamiliar with how a government system works including roles and responsibilities of departments and employees. Additionally, they may be unfamiliar as to where one department ends, and another begins.</i></p>	<ul style="list-style-type: none"> • At the start of any engagement, orient stakeholders to organizational structures, policies, and procedures, including who the final decision-makers are. • Reach out to other ODOT programs and service areas and partners to coordinate engagement efforts, minimize community confusion and consultation fatigue. • Make engagement opportunities easy to find and accessible to communities.
<p>Distrust of the government</p> <p><i>Communities may not trust government for a variety of reasons, including personal negative experiences, lingering fears of oppressive governments, and historical government policies that created the injustices seen today.</i></p>	<ul style="list-style-type: none"> • Learn about historical injustices faced by different communities to not perpetuate trauma in the engagement. • Ensure leadership commitment and involvement in the engagement process. • Build trust by following through on commitments and refraining from making promises that cannot be kept. • Explain the expectations and any limitations of the engagement and be clear about what is or is not negotiable. • Neutralize power differences by ensuring institutional engagement priorities, efforts and timelines align with the communities and if they do not, explain why. <p><i>Suggested Resources</i></p> <ul style="list-style-type: none"> • ODOT Office of Social Equity – Engagement Assistance
<p>Implicit bias</p> <p><i>Implicit bias refers to learned stereotypes and prejudices that operate automatically and unconsciously. Individual bias influences organizational culture perpetuating or replicating negative impacts.</i></p>	<ul style="list-style-type: none"> • Recognize that everyone, regardless of their identity holds implicit bias and these same individuals are responsible for identifying and addressing their own biases. • Practice challenging individual biases by stopping, assessing, and inserting more intentional equitable actions into daily work. • Acknowledge that this is the beginning of a lengthy process towards equity and must be addressed at both individual and organizational levels to eliminate structural inequities. <p><i>Suggested Resources</i></p> <ul style="list-style-type: none"> • Social Equity Foundations document on the Office of Social Equity intranet site.
<p>Government jargon</p> <p><i>Government uses terminology that is useful when conveying technical concepts or when communicating between government institutions. However, certain terms can be unfamiliar and intimidating to stakeholders.</i></p>	<ul style="list-style-type: none"> • Use plain language and visuals to communicate complex concepts. • Do not assume that government jargon is common knowledge. • Refrain from using acronyms. <p><i>Suggested Resources</i></p> <ul style="list-style-type: none"> • ODOT Communications Office – Plain Language Guideline
<p>Language</p> <p><i>Many Oregon households experience difficulty speaking English. Among these households, Spanish language the most spoken outside of English. Ensure a comfortable environment for stakeholders with differing language, hearing, and vision needs.</i></p>	<ul style="list-style-type: none"> • Identify the language and ADA needs of the community by reviewing data and speaking to community leaders. • Translate materials to the language or dialect of the stakeholders. • Be mindful that some English words have a different meaning in other languages and dialects. • Provide real-time translation and accessible services. • Include closed captions for videos. • Insure that digital materials are accessible via screen reader. <p><i>Suggested Resources</i></p> <ul style="list-style-type: none"> • ODOT Communications Office – Interpreter/Translation process; Language and Communication Access – Interpretation, Translation, and Assistive Technology

Common barriers to participation	Potential solutions
<p>Communication</p> <p><i>Certain populations, including youth, individuals experiencing homelessness or with a substance use disorder, may be more difficult to engage with traditional communication methods. Often, they are the most valuable voices. Consider interactive, dynamic, and flexible engagement methods to reach less informed and unengaged stakeholders.</i></p>	<ul style="list-style-type: none"> • When using social media, tap into community influencers and key leaders that can promote the engagement. • Online engagement may work for more engaged populations, but digital barriers may prevent other communities from participating. Consider using: <ul style="list-style-type: none"> ◦ Word-of-mouth. ◦ Text messages to reach youth, younger adults, and cell phone users. ◦ Printed fliers. ◦ Local radio, newspaper, or television. ◦ Emails to partners that engage with primary stakeholders. ◦ Partner with spaces that have open wifi or a local/nearby library to view our online materials <p><i>Suggested Resources</i></p> <ul style="list-style-type: none"> • ODOT Communications Office – Communications
<p>Geographic location</p> <p><i>Review the Social Equity Index Map to ensure resources are distributed equitably, it is important to identify where investment and resources are needed most and prioritize the voices of those living in marginalized areas.</i></p>	<ul style="list-style-type: none"> • Plan multiple events in different locations within the same community. • Choose a location within walking distance or accessible by public transportation. • Offer the Equitable Engagement Compensation Program.
<p>Immigration status</p> <p><i>The growing hostility towards immigrants and fear of deportation in the U.S. may make it difficult to engage this population.</i></p>	<ul style="list-style-type: none"> • Refrain from holding meetings in government buildings and opt for community settings. • Collaborate with trusted cultural, professional, advocacy, or faith organizations to make participants feel safe. • Use trusted sources like community partners or popular media outlets to reach immigrant communities. <p><i>Suggested Resources</i></p> <ul style="list-style-type: none"> • Mayor’s Office for Immigrant Advancement – Resources, Contact List, Community Resource Directory
<p>Intercommunity dynamics</p> <p><i>Community tensions, power structures, and other norms may create a barrier when bringing together different groups.</i></p>	<ul style="list-style-type: none"> • Recruit key members of the community to learn about the relationships and history between communities and prepare for any issues that arise before bringing them together. • Build on existing community-based work so that the engagement does not perpetuate trauma or tension. • Understand that intercommunity dynamics may need to be addressed before moving forward in the process. • Commit time to learn and practice facilitation for equity and inclusion to increase the success of the engagement. <p><i>Suggested Resources</i></p> <ul style="list-style-type: none"> • ODOT Partnership Database • Resource 2: Facilitating for Equity and Inclusion
<p>Competing priorities</p> <p><i>Stakeholders have other commitments and responsibilities that may make it challenging for them to participate in engagement processes.</i></p>	<ul style="list-style-type: none"> • Food: Budget for healthy and culturally appropriate snacks or meals to offer, especially if the engagement is taking place during a mealtime. • Time: Provide stakeholders with advance notice of the engagement by reaching out to them at least 2 weeks before for face-to-face and online meetings. • Relevancy: Ensure the project or program is important to stakeholders and that they will see results from their participation. • Finances: Always offer the Equitable Engagement Compensation Program. • Schedules: Ask Community Leaders to partner in hosting engagements. Do so before or after work and school hours or meet people where they are by bringing to an already scheduled event. • Capacity: Involve stakeholders as early as possible and asses their readiness to participate. If necessary, set time aside to get them ready.
<p>Stigma</p> <p><i>The stigma placed on certain populations, such as people lack of expertise on an area or lack of skill, can prevent them from participating in the engagement.</i></p>	<ul style="list-style-type: none"> • Consult with other agencies, community experts, and other nontraditional partners to reduce stigma in chosen engagement strategies. <p><i>Suggested Resource</i></p> <ul style="list-style-type: none"> • ODOT Office of Social Equity

Facilitating for Equity and Inclusion

The facilitator's role is key to the success of community conversations, dialogues, forums, or town halls. More importantly, facilitator's help to create culturally appropriate, safe, and respectful engagement settings.

The Facilitator's Role is to:

- Create group agreements (with the group if time allows) or present a draft and ask participants to add what is missing.
- Encourage the participation of those with a quieter voice and less power.
- Respect participants' time by creating a thoughtful agenda with realistic timeframes for discussion and action items.
- Avoid tokenism by never expecting individuals to speak on behalf of, or represent, an entire group.
- Be interested in a participant's honest opinion – both positive and negative – and let participants know that there are no right or wrong answers.
- Encourage participants to listen for what is being created by the diversity in the space.
- Offer and receive feedback with tact and finesse.
- Remain neutral. Do not give preferential treatment.
- Look beneath emotional responses for root cause.
- Promote mutual learning and understanding.
- Understand that the collective wisdom of the group is more powerful than one person's position or voice.

Paraphrasing: Clarify what a participant said by using own words to restate the main points. Try, "What I think I am hearing is..., is this correct?"

Drawing People Out: Use in conjunction with paraphrasing to get more clarity. Try, "What do you mean by that?"

Stacking: If several people wish to speak, keep a speaking order list by saying "First we'll hear from Michael, then Jill, and then John."

Set an expectation of respect: If someone is using hurtful language, make it stop. Try, "That term makes me uncomfortable and might be hurtful to others. Could you please refrain from using it?"

Tracking: Pause to acknowledge the different ideas put forth to make sure nothing gets lost even if there isn't enough time to discuss. Create a sheet to parking lot or bike rack any ideas to be reviewed or discussed later.

Making Space: Keep an eye on the body language and facial expressions of participants. One's body language could indicate that someone wants to speak but is hesitant or was made to feel uncomfortable by something that was said. Take a moment to check-in to see how everyone is feeling about the discussion so far.

Thinking Outside of the Box: If the group is sharing similar ideas, ask if anyone sees things differently that they wish to share or if they can step into the shoe of someone who might see the issue differently.

Balancing: Outspoken people can dominate or dictate the direction of a discussion. Balancing asks for others to share their views because the silence of others does not imply consent. Try, "Those are good points. Let's be sure to hear what others have to say as well." "Are there new voices that we haven't heard?"

Intentional Silence: Introduce a few seconds pause to give participants time to collect their thoughts before they respond. A pause may also encourage a less talkative person to speak up.

Check in: Take intentional time to pause the entire meeting space. As a facilitator observe and ask all participants to check in with themselves, ask questions that they don't want to state aloud, or generally soak in information that has been offered.

Sample Engagement Plan

- **Engagement Lead(s):** Steering Committee, Community Engagement and Secondary Data Workgroups and Consultant Partner
- **Purpose:** To activate and administer the [Engagement Grid \(EG\)](#)
- **Anticipated Outcome:** To develop and implement a [Community-Based Organization \(COB\)](#)
- **Stakeholders:** Residents, ODOT, local elected officials, local businesses, community organizing groups and others
- **Timeline:** September 2018 through September 2019

Stages of the process	Engage communities?	Engagement level	Engagement method
Pre-planning to create the new EG.	Yes	Inform – communities of EG requirements and opportunities to participate in the planning and development process. Consult – primary stakeholders to help shape the purpose, anticipated outcome and EG engagement plan.	Phone calls, emails
Identify stakeholders to invite to partner in on developing the Oregon EG.	Yes	Inform – potential stakeholder partners of purpose and anticipated outcome, time and roles and responsibilities.	Phone calls, emails
Launch EG/COB kick off celebration.	Yes	Inform – Community of purpose, anticipated outcome and the information needed from them for the process.	Emails, fliers, web-based: social media
Develop community engagement strategy for EG process.	Yes	Collaborate – with stakeholder partners to identify engagement strategies and actions to assess community needs.	Steering Committee, Community Engagement and Secondary Data Workgroups.
Develop EG primary data collection tools and implementation process.	Yes	Collaborate – with stakeholder partners to identify qualitative and quantitative questions.	Steering Committee, Community Engagement and Secondary Data Workgroups and Consultant Partner
Administer EG primary data collection tools.	Yes	Collaborate – with stakeholder partners to promote online survey and to facilitate focus groups and key informant interviews.	All stakeholder partners involved.
Review Secondary (existing) data.	No	N/A	N/A
Analyze EG data results.	Yes	Inform – stakeholder partners of survey data results. Consult – stakeholder partners to prioritize reoccurring themes and needs e.g.: housing, employment.	Steering Committee, Community Engagement and Secondary Data Workgroups, Consultant Partner, and other stakeholder partners.
Prioritization of EG data results.	Yes	Inform – residents of survey results and key priority areas. Consult – residents to vote on top areas of need, e.g., public transportation, employment resources.	Oregon residents
Draft EG Report	Yes	Collaborate – with stakeholder partners to draft EG Report. Inform – residents of Final EG Report.	Steering Committee, Community Engagement and Secondary Data Workgroups, and Consultant Partner.

Virtual Event Planning Checklist & Sample Agenda

Virtual Event Planning Checklist

Before the event

Planning Team:

- Create the agenda for the event and connect with the community to specify how far in advance.
- Determine format to achieve the event purpose (See Step 4: Data Collection)
- Select date, time, and video platform for community event
- Identify event roles and responsibilities (facilitator/moderator, speakers, note takers, and chat box monitors)

- Request City Officials or Press through the ODOT Event Form
 - If requesting speakers, complete the ODOT Briefing Form
- Address potential barriers to engagement (See Resource 1: Common Barriers)
- Contact the [Office of Communications](#) to add the event to the ODOT event calendar
- Promote the event using key message and communication channels identified in the communication plan (See Step 3: Communication Plan)

Set-up

- Does the date or time conflict with other city events, holidays, or school times?
- Do participants need to RSVP in advance?
- How will event information be sent to participants?
- How can the event accommodate meeting participants with disabilities? (Live captions, sign language interpreters, or other assistive technology)
- Who will be responsible for sharing presentation screen?

- Will the event have a call-in option?
- What are the ground rules for the event? (Audio and video etiquette)
- How can participants engage during the event? (Raise hand feature, chat box, or calling on participants)
- What event tools are needed? (Virtual whiteboard, screen share, break out rooms, or live polls)
- Will the event be recorded and made available to the public?

During the event

- At least 30 minutes before event, test technology with event speakers and facilitators to confirm audio and visual.
- Monitor attendance and admit registered participants into the event.
- At the start of the event, share the meeting agenda, the Community Engagement Principles, and the Community Engagement Process.
- Let participants know if the event will be recorded.
- Depending on number of participants and type of event, present an icebreaker or allow participants to introduce themselves in the chat box or over video.
- Share participant feedback evaluation before the event ends or soon after.

After the event

- Schedule a community engagement planning team debrief meeting soon after the event ends.
- Complete engagement planning team self-assessment (See Step 5: Evaluation Plan)
- Develop or review after action plan.
- Develop and distribute summary, final recommendation, or status reports (See Step 6: Report Back)

Sample Agenda

- 5:00 p.m. **Technology Check**
Allow facilitators and speakers to test out internet connection, audio, and visual.
- 5:30 p.m. **Admit participants into the event**
Give event participants time to connect.
- 5:35 p.m. **Welcome and introductions**
Give folk time to introduce themselves or conduct an icebreaker if time permits.
- 5:45 p.m. **Overview of purpose of event**
Use the completed Community Engagement Plan (Section 1 of the Guide) to provide participants with details of the goal and anticipated outcome including the value to communities, level of participation and what is needed from attendees to help achieve the anticipated outcome.
- Group agreements and event ground rules**
Develop agreements with attendees or share draft and ask attendees to add/edit accordingly. Inform attendees of the virtual event ground rules.
- 6:00 p.m. **Speaker 1: Opening Remarks - Public health or content expert**
Provide overview of the project or program – connect back to purpose of event and describe health impact.
- Speaker 2: Community Expert**
Share lived experience and familiarity with project or program.
- 6:30 p.m. **Data collection**
Describe the process to collect data/information from participants i.e. survey, dot voting, small group discussions.
- 7:30 p.m. **Take a 5-minute Stretch Break**
- 7:35 p.m. **Interactive activity report back**
Invite individuals or small groups to give high level report of experience or top themes.
- 7:45 p.m. **Evaluation**
Administer participant feedback survey to learn what worked well or any opportunities for improvement.
- 8:00 p.m. **Closing remarks and thank participants**
Share next steps including when and how participants will be informed of final decision, timelines, and where to find additional information.

Group Charter Template

This is a simplified document. For robust charter guidance and alignment with HB2985, visit the Office of Social Equity's external facing site: [Social Equity and Advisory Committees](#).

- I. Overview – How did the group originate?
- II. Group's Mission Statement – What does the group aim to do and why?
- III. Statement of Purpose – How does this group help ODOT achieve its mission and vision?
- IV. Group Responsibilities – What duties does the group have to fulfill?
- V. Member Responsibilities – What duties do members have to fulfill?
- VI. Operations and Procedural Rules – Define structure and operating procedures of the group.
 - a. Meeting frequency- How often will the group meet?
 - b. Team Structure – Who can participate in the group? What is the length of membership? Are there any leadership roles that members can assume? Who serves as the liaison between ODOT and the group?
 - c. Group Agreements – What guidelines will the group follow?
 - d. Decision-Making - How will the group make decisions? (e.g., consensus, voting, etc.)
 - e. Engagement Process – What other groups or agencies will the group collaborate with? How will the group engage with ODOT, staff, clients, and community residents?
 - f. Executive Participation – What role will ODOT leadership play?
 - g. Subcommittees – Can the group form subcommittees? How can members participate in a subcommittee?
 - h. Minutes – Who will keep group meeting minutes and how often will they be distributed?
 - i. Dismissal - What causes a dismissal from the group? How will a vacancy be filled?
 - j. Charter Review - Will there be an evaluation of the group's performance or charter and how often will adjustments be made?
- VII. Group Member Signature

Sample Memorandum of Agreement

Memorandum of Agreement (MOA): A written legal document describing a cooperative relationship regarding goods and/or services between ODOT and a vendor to meet an agreed upon objective(s).

Outline the expected contributions or commitments of ODOT.

Thank you for your contribution to the ODOT Advisory Committee. As a member, you are making a commitment to help the Oregon Department of Transportation achieve its mission – to provide a safe and reliable multimodal transportation system that connects people and helps Oregon’s communities and economy thrive.

This document outlines the necessary conditions of your role.

ODOT Advisory Committee will:

- Adhere to values of equity, community engagement, and racial justice in all its work.
- Provide staff support to coordinate meetings.
- Provide resources and trainings to support activities.
- Conduct an annual review of the charter and performance to make recommendations for adjustments based on identified community needs, trends, and available resources.
- Provide an incentive of \$30 per hour. This will include 10 meetings per year, and it will not exceed \$600 a year without approval from ODOT.

Outline the expected contributions or commitments of the vendor.

Advisory Committee members will:

- Serve a two (2) year membership term and attend no more than ten (10) meetings a year.
- Represent the concerns and interests of their communities and/or their respective constituency by actively participating in meeting discussions.
- Ensure committee work is responsive to community needs and aligns with ODOT’s mission, vision, and the Strategic Action Plan.
- Review population data reports, transportation planning documents, and other materials to make recommendations on ODOT policies, procedures, programs and services.
- Promote community awareness of the social determinants of health and health equity issues.
- Collaborate with ODOT’s programs and services to plan, support, and facilitate community meetings and special events.
- Attend, as needed, other internal and external partner meetings.

Oregon Department of Transportation:

Signature: _____

Printed Name: _____

Date: __/__/__

Resident

Signature: _____

Printed Name: _____

Date: __/__/__

Approved as to Form:

Date: __/__/__

Sample Evaluation Form & Question Bank

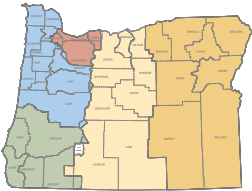























- Evaluation survey to collect feedback from participants
- Evaluation method: Survey sent electronically to registered participants via Forms
- Frequency: Survey participants after every community event

Questions

<p>Are you</p> <ul style="list-style-type: none"> <input type="checkbox"/> Hispanic or Latinx or <input type="checkbox"/> Not Hispanic or Latinx? 	<p>What racial group describes you?</p> <ul style="list-style-type: none"> <input type="checkbox"/> Asian/Asian American <input type="checkbox"/> Black/African American <input type="checkbox"/> Native American/Alaskan Native <input type="checkbox"/> Native Hawaiian/Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Other: 	<p>Principles</p>	<p>Example feedback questions for participants</p>	<p>Principle</p>	<p>Example self-assessment questions for planning team</p>
<p>What ethnic group describes you?</p> <ul style="list-style-type: none"> <input type="checkbox"/> Arab/Middle Eastern <input type="checkbox"/> Afro-Caribbean <input type="checkbox"/> Cape Verdean <input type="checkbox"/> Chinese <input type="checkbox"/> Colombian <input type="checkbox"/> Dominican <input type="checkbox"/> Haitian <input type="checkbox"/> Portuguese <input type="checkbox"/> Puerto Rican <input type="checkbox"/> Vietnamese <input type="checkbox"/> Don't know <input type="checkbox"/> Other 	<p>Where do you live? Specify neighborhood and zip code:</p> <p>Where did you learn about this community event?</p> <ul style="list-style-type: none"> <input type="checkbox"/> Newspaper <input type="checkbox"/> Social Media <input type="checkbox"/> TV <input type="checkbox"/> Radio <input type="checkbox"/> Community Organization <input type="checkbox"/> Family/Friend <input type="checkbox"/> Other: 	<p>Accountable</p>	<ul style="list-style-type: none"> • Did this [engagement] meet your expectations? Describe your level of participation. • How satisfied are you with the issues addressed in the process? 	<p>Accountable</p>	<ul style="list-style-type: none"> • What were the gaps between the plan and the reality? • What were the goals of the process and what did you expect to happen? Were your goals achieved? • Were there any unforeseen negative impacts/ consequences identified?
		<p>Collaborative</p>	<ul style="list-style-type: none"> • How satisfied are you with the diversity of people, organizations, or neighborhoods in the process? • How satisfied are you with your level of influence over the outcomes? • How likely are you to attend another ODOT community [engagement] in the future? • What can you help us do to make this better? 	<p>Collaborative</p>	<ul style="list-style-type: none"> • Did engagement process planning partners reflect the priorities, needs, interests and assets of stakeholders? • How did the engagement change or improve relationships with residents or community partners? • How do new or established relationships fit into long-term program goals?
		<p>Inclusive</p>	<ul style="list-style-type: none"> • How would you rate the {Location, Date, Time, Length, Speakers, Language/Translation, Accessibility} of the [engagement]? • How satisfied are you that the process includes those who will be most impacted by the outcome? • How satisfied are you with the facilitator/s? • How did you hear about this [engagement]? • What can you help us do to make this better? 	<p>Inclusive</p>	<ul style="list-style-type: none"> • Were the demographic characteristics of participants representative of stakeholders? • Were there stakeholders missing from the engagement process? • When stakeholders with less power or a quieter voice brought forward issues, how were those addressed?
		<p>Sustainable</p>	<ul style="list-style-type: none"> • Were you offered additional information about training, technical assistance, or funding opportunities? • What impact do you see this [engagement] having on your community needs? • What other needs exist? 	<p>Sustainable</p>	<ul style="list-style-type: none"> • What was the short term or long-term impact on residents, participants, partners, and ODOT programs, services, and staff? • How do these results contribute to improved health outcomes?
		<p>Transparent</p>	<ul style="list-style-type: none"> • How satisfied are you with the information you were provided about the community engagement process? • How satisfied are you with the outcome of the process? • What can you help us do to make this better? 	<p>Transparent</p>	<ul style="list-style-type: none"> • Was there appropriate information provided to stakeholders? Was it timely, accessible, and easy to understand? • Did we obtain the information we needed or wanted? • How was the information generated by the engagement process used by ODOT, policy makers, partners or others?
			<ul style="list-style-type: none"> • Overall, how would you rate this [engagement]? • How likely are you to attend a similar community engagement event in the future? • If you would like to be contacted about your responses, please leave your information here: Name, phone, email address. 		

Sample Community Engagement Summary Infographic

Conversations about (what?):
(WITH WHOM?)

<p>GOALS</p> <ol style="list-style-type: none">1 What was your first goal? <i>Ex. Provide a platform for listening to concerns.</i>2 And your second goal? <i>Ex. Provide forums to discuss emergent traffic issues.</i>3 How about the third? <i>Ex. Promote planning with non-traditional partners.</i>	<p>NEIGHBORHOOD</p> <p>Share a map of the specific community as it relates to your project or program. List the neighborhoods or counties.</p> 							
<p>DATA</p> <p>What data did you collect? <i>Ex.</i></p> <table><tr><td> Surveys ? Submitted</td><td> Miles ? Daily</td></tr><tr><td> Age Range ?? -??</td><td> EV Drivers ?</td></tr></table>	 Surveys ? Submitted	 Miles ? Daily	 Age Range ?? -??	 EV Drivers ?	<p>PARTNERS</p> <table><tr><td> ? Partners</td><td> ? Meetings</td><td> ? Attendees</td></tr></table> <p>List the partners who were in attendance, sponsored, or hosted your meetings.</p>	 ? Partners	 ? Meetings	 ? Attendees
 Surveys ? Submitted	 Miles ? Daily							
 Age Range ?? -??	 EV Drivers ?							
 ? Partners	 ? Meetings	 ? Attendees						
<p>WHAT WE HEARD</p> <p>Be specific on what was learned in the community meetings. <i>Ex:</i></p> <ol style="list-style-type: none">1. <i>What are specific concerns?</i>2. <i>What increased access is required?</i>3. <i>What support is needed that you didn't expect?</i>4. <i>Who needs to be involved that didn't get invited?</i> 								
	<p>Community Meetings</p> <p>Date: Location: Presenters:</p>							