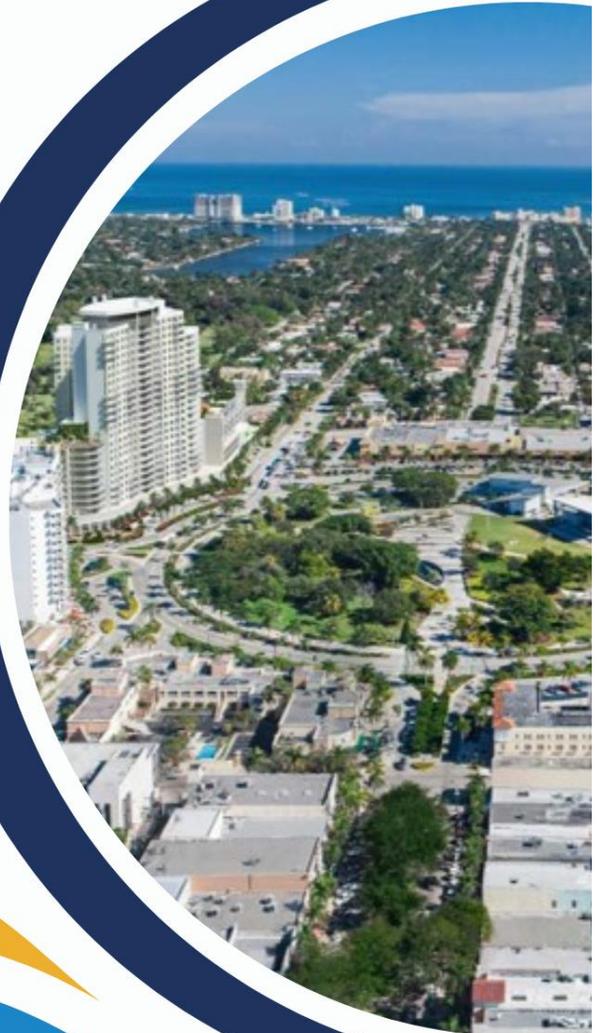# HOW TO GUIDE

COMMUNITY AND PARTNERSHIP ENGAGEMENT FOR DEVELOPING RECOMMENDATIONS AND ACTION PLANS

January 2024

The How To Guide to Community and Partnership Engagement was developed by Ocha Transformations, a national WBE- and MBE-certified facilitation, training, and technical assistance firm. Our mission is to bring leaders, organizations, and communities together to maximize social impact and sustainable change. With a focus on advancing anti-racism and equity for communities most impacted, we specialize in harnessing the collective power of groups through participatory facilitation and engagement methods where participants actively contribute to the generation of ideas, shared decision-making, and collective action. - www.ochatransformations.com

Acknowledgments

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BACKGROUND

Overview of Prosperity Broward

The Prosperity Partnership is Broward County's collective impact initiative focused on creating an inclusive economy that creates high-wage jobs, vibrant communities, and global competitiveness. This initiative is housed within the Greater Fort Lauderdale Alliance Foundation and prioritizes its efforts through eleven prosperity pillars.

Broward County has thousands of non-profit organizations with billions of dollars in funding but still faces many economic challenges. Too many families within Broward County struggle to make ends meet and at the same time, businesses are seeking needed talent. Longstanding structural barriers and resource constraints have resulted in fragmented opportunities and unrealized potential. There is a need and mutual benefit in aligning efforts to improve the well-being of families and our economy. Core to this effort is strengthen connections with communities most impacted by inequities.

The Prosperity Partnership's economic mobility pillar, also known as Prosperity Broward, engages municipal leaders, funders, educational institutions, social service and faith-based organizations, business leaders, and residents to increase economic mobility through policy and system changes.

Figure 1. Six Broward County Zip Codes Impacted by Economic Inequity
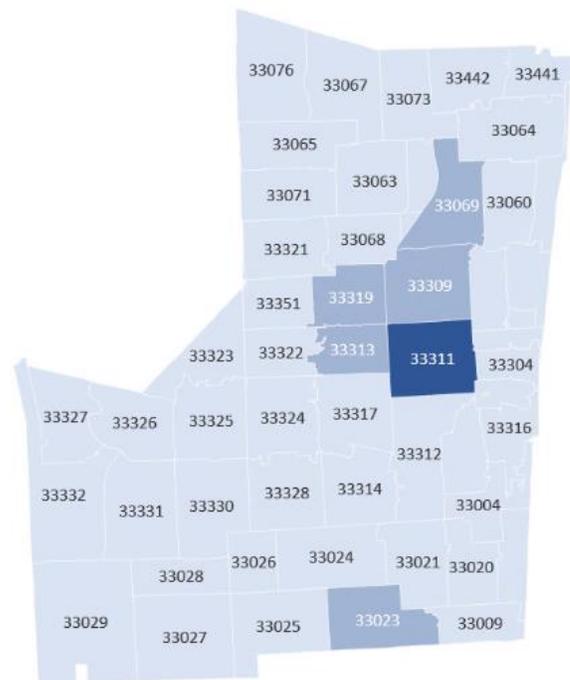
To identify the area and population with the greatest need, the Prosperity Broward's Data Working Group analyzed specific variables, such as per capita income, poverty rate and expected job growth. Six zip codes - 33311, 33313, 33319, 33069, 33023, 33309 – were identified, representing 12 of Broward County's 31 municipalities.

Due to ongoing structural racism and racial residential segregation, these areas have median income levels that are lower than the county average. The median household income in the six zip codes is $30,000 compared to the county median of $53,000. While the post-secondary educational attainment rate for the county is

43.9% for adults 25-64 years old, the average is 27% in the six zip codes, and the under-18 poverty rate ranges from 20.1% to 47.3%.

Additionally, these zip codes have a history of racial inequalities, impacting access to transportation, home ownership, education, employment, and other resources. This has created generational cycles of poverty among people of color living in these areas. 65% of the residents in the zip codes are Black and 14% are Latino/Hispanic, making up 79% of the residents.

Table 1. Identified Pilot Zip Code

	33023	33069	33309	33311	33313	33319
Per capita income	$20,511 Growth	$26,115 Growth	$24,782 Growth	$16,449 Flat	$17,052 Growth	$26,554 Growth
Poverty rate	15% Slow drop	15% Slow drop	17% Slow drop	31% Flat	21% Steep drop	15% Flat
HS diploma	83.2%	84.1%	84.7%	75.8%	80.2%	84.8%
Expected job growth through 2031 *per 1000 residents*	+542 *8*	+1014 *35*	+4735 *13*	+974 *15*	+731 *12*	+549 *11*
Top 5 opt. jobs as % of expected growth	11%	28%	7%	13%	13%	9%

The six zip codes highlighted in Figure 1 experience high levels of economic inequity in Broward County. The zip code shaded in darkest blue (33311) is home to the city of Lauderdale Lakes, which leads the state of Florida with the highest number of children living in poverty.

Table 2. Identified Pilot Municipality

	Ft. Lauderdale	Lauderdale Lakes	Lauderhill	Oakland Park
Per capita income	$37,583	$18,738	$23,189	$27,006
Poverty rate	17%	21%	21%	17%
HS diploma	84%	74%	86%	83%
BA degree	32%	16%	23%	26%

Economic Mobility Pilot Project with the City of Lauderdale Lakes

In 2022, Prosperity Broward launched a groundbreaking economic mobility pilot project to engage a cross-sector of groups in advancing economic mobility in the City of Lauderdale Lakes. Prosperity Broward served as the convener. The pilot project focused specifically on mothers who were the only parent and primary earners in their household. The development and implementation of an action plan consisted of multiple phases:

> **Economic mobility** is the ability for an individual, family, or group to improve their economic status.

Phase I: Pilot Co-Design Launch & Development of Action Plan

- MOU signing with the City of Lauderdale Lakes
- Hiring a facilitator and evaluator
- Recruiting a cohort of community co-researchers.
- Conducting a community asset and resource analysis
- Conducting level-setting sessions
- Setting up a community action board
- Developing a community engagement plan
- Identifying barriers and list of recommendations to address each barrier
- Conducting data analysis.
- Developing action plan

Phase II: Implementation

- Engaging employers and service providers to adopt best practices
- Involving cities to drive system and policy changes
- Coordinating support service partners

- Measuring and reporting results

Phase III: Evaluation

- Developing a roadmap that will enable replication and scale for all of Broward County
- Sharing roadmap broadly as a national example for other communities to dismantle their barriers to economic mobility

The pilot project engaged mothers, residents, service providers, and employers using participatory methods to identify community assets and needs. Together, they co-designed solutions to remove barriers and create fair, sustainable pathways to economic mobility.

Note: This document combines learnings from Phase I of the pilot project with best practices for community and partner engagement more broadly. In doing so, this document serves as a "how to" guide to support the initial stages of future Prosperity Broward projects using participatory approaches to create system and policy changes in addressing inequities.

HOW TO USE THE GUIDE

Overview of the Guide

This guide offers a step-by-step process for Prosperity Broward to implement a strategic, participatory approach for systems change. The guide provides key considerations, strategies, and tools to support partnering with communities who have been systematically marginalized. While this guide is rooted in Prosperity Broward's experience with its economic mobility pilot project, the steps and strategies are generalizable to any project within or beyond Prosperity Broward that intends to partner with communities to advance equity. Through this guide, Prosperity Broward and partners will be able to effectively address socioeconomic disparities with solutions that center, engage, and mobilize communities.

Intended Users of the Guide

The primary intended users of this guide are Prosperity Broward staff responsible for implementing social impact projects across the six Prosperity Broward pillars. However, this guide can also be used more broadly by service providers, employers, and individuals interested in engaging and partnering with communities experiencing inequities.

Structure of the Guide

The structure for this guide is based on the four-step framework used for the City of Lauderdale Lakes Economic Mobility pilot project. Each section of the guide highlights one step and related community-centered strategies, tips, and tools. The guide also includes real-world examples of how Prosperity Broward implemented each step in the pilot project, when available.

1. ***Step One - Build the Foundation for a Strategic Participatory Approach****.* This initial step focuses on setting your project up for success by assessing and building readiness, establishing an internal team that will meet your project needs, gathering formative information about your community of interest, and managing expectations about the time and resources required for community engagement.

2. ***Step Two – Conduct an Environmental Scan***. The second step focuses on methods to understand the community context, as well as selecting partners from various sectors.

3. ***Step Three - Launch the Process****.* The third step shows how to establish a framework for engagement that truly shifts power and leadership to the community and partners for a participatory process.

4. ***Step Four – Deepen Understanding through Community Engagement****.* The fourth step focuses on how to develop a community engagement plan, creating a process to identify needed data and relevant data collection methods.

5. ***Step Five - Community Action Planning****.* The fifth step focuses on prioritizing recommendations to address inequities and developing recommendations into a one-year community action plan.

The document closes with high-level guidance for implementing the community action plan and sustaining momentum over time.

Introduction to Strategic Participatory Approaches

A **strategic participatory approach** is a process in which community members, organizations, or individuals, actively and collaboratively engage in decision-making, planning, and problem-solving activities. This approach involves a structured and intentional strategy to engage community and partners in a way that ensures their input and perspectives are prioritized when developing strategies, policies, or interventions. The goal is to achieve more inclusive, effective, and sustainable outcomes by harnessing the collective wisdom and expertise of individuals directly impacted by or involved in a particular issue or project.

There are other terms and phrases that are used interchangeably or in conjunction with "strategic participatory approach", including:

- Participatory Planning
- Community-Centered Approach
- Community Participation
- Citizen Participation
- Public Engagement

While a strategic participatory approach is integral to systems change, it cannot be launched overnight. It requires a deliberate allocation of time and resources. This level of commitment is often tested when engaging diverse partners and ensuring sustained funding. Building meaningful partnerships, fostering trust, and involving communities authentically necessitate a patient and iterative journey. Embracing the long-term nature of this approach yields substantial success in terms of tangible outcomes. Equally vital are the relationships and trust fostered throughout the process, resulting in outcomes that transcend immediate changes and move towards achieving sustainable impact in complex systems that truly transforms communities. Overall, the strategic participatory approach offers several benefits:

Inclusivity: It ensures that a wide range of perspectives and voices are heard, including those of marginalized or underrepresented groups, leading to more inclusive decision-making processes.

Collective Ownership: Gives community and partners a sense of ownership and control over the decisions that affect their lives or organizations, fostering a greater sense of responsibility and commitment.

Enhanced Problem Solving: It taps into the collective knowledge and expertise of communities and partners, often resulting in more innovative and effective solutions to complex problems.

Transparency: It promotes transparency in decision-making, as communities and partners can see how and why certain decisions are made, which can build trust and accountability.

Improved Implementation: When communities and partners are actively involved in the planning and design of solutions, they are more likely to support and actively participate in the implementation phase.

Tailored Solutions: The approach allows for the customization of solutions to fit the specific needs and context of the community, increasing the chances of success.

Long-Term Sustainability: Solutions developed through this approach are often more sustainable because they are aligned with community values and priorities and have leveraged the assets of partners.

Social Capital: It can strengthen social networks and relationships among communities and partners, fostering a sense of community and collaboration that extends beyond the immediate project or decision.

Meaningful Community Engagement

Ensuring the meaningful involvement of communities most impacted by inequities is a central component of a strategic participatory approach. The term "community" is a group of people who are brought together by something in common. This can include refer to any group sharing something in common – **socio-cultural background** (such as Latino, LGBTQ or soccer moms), **place** (such as a city, neighborhood, or school district), **experience** (such as shared experience of racism), or **interest** (e.g., a community's concern about poverty or violence prevention). One person can belong to many different communities.

Figure 2. Differences in Defining Community

Community Members	Community Partners
Groups of individuals who have something in common. • Parents • People with disabilities • Latinx youth	Organizations, agencies, or community groups. • Church • Neighborhood association • Community center

The key is to identify individuals who have direct, firsthand experiences with the issue or topic. Grassroots, voluntary and faith organizations as well as mutual aid groups or civic associations are deeply embedded in their communities and have a great understanding of local dynamics. Often staff of these organizations reflect the community they serve. This is what makes them such important partners – but their role complements, rather than replaces, the voices and perspectives of those with lived experiences. Communities possess invaluable cultural knowledge and contextual insights, which can be a determining factor to whether a solution works or not.

For community involvement to be effective, partners must be willing to share and shift power. Failure to involve communities appropriately can lead to resistance, opposition, or even conflict – which furthers distrust and reproduces existing inequities and power imbalances. Given that the community members most impacted by systemic inequities have been under-represented in the decisions that impact their lives, organizational partners must be able to act in a way that understands, amplifies, and mobilizes community voices. To do so, organizations must first develop a strong foundation of organizational self-awareness, capacity to shift power to communities, and community trust.

Trust is the foundation of successful community engagement. However, it is important to acknowledge that establishing trust can be a complex and challenging endeavor. **The process of cultivating trust begins with the recognition of historical injustices, including the structural racism and generational trauma that have perpetuated inequities within communities.** To bridge the gap of distrust, it is imperative to create spaces for healing and reconciliation, allowing the foundations of trust to be nurtured. This journey involves proactive efforts to gather information, create genuine connections and engage in shared learning experiences.

Tips for Facilitation

Effective group facilitation is at the core of successful implementation when it comes to the activities and processes outlined in this guide. In the context of a strategic participatory approach, creating an environment that fosters open communication and active participation is crucial. Whether it's seating participants around small tables, opening sessions with an icebreaker or encouraging collaboration through activities, the facilitator plays a pivotal role in shaping the dynamics of the group. Listed below are valuable tips for facilitation. By following these guidelines, facilitators can create an inclusive and productive atmosphere where participants are engaged and able to contribute meaningfully to the process.

1. Create an environment conducive to communication by seating participants around small tables or in semicircles.

2. Make participation an expectation; ask questions frequently and use open-ended questions to encourage thought and participation.

3. Create opportunities for participants to work in teams.

4. Give small assignments in advance, and ask participants to come to meetings prepared to share their work.

5. Encourage participants to evaluate the group's working dynamic and offer solutions to improving interaction if needed.

6. Talk with quiet participants during breaks, and help them express their ideas and share their thoughts with the group.

7. Use flip charts or overhead transparencies to record comments, but face participants while writing or ask someone else to do it.

8. Suggest the "next step" if a meeting seems to be stagnating.

9. Walk around to gain attention, but look directly at participants.

10. Expect to make some mistakes! Acknowledge them, correct them, and move on.

STEPS FOR A STRATEGIC PARTICIPATORY APPROACH

STEP 1: BUILD THE FOUNDATION FOR A STRATEGIC PARTICIPATORY APPROACH

This initial step focuses on setting your project up for success by assessing and building readiness, establishing an internal team that will meet your project needs, gathering formative information about your community of interest, and managing expectations about the time and resources required for community engagement.

STEP 2: CONDUCT AN ENVIRONMENTAL SCAN

The second step focuses on methods to understand the community context, as well as selecting partners from various sectors.

STEP THREE - LAUNCH THE PROCESS

The third step shows how to establish a framework for engagement that truly shifts power and leadership to the community and partners for a participatory process.

STEP FOUR – DEEPEN UNDERSTANDING THROUGH COMMUNITY ENGAGEMENT

The fourth step focuses on how to develop a community engagement plan, creating a process to identify needed data and relevant data collection methods.

STEP FIVE - COMMUNITY ACTION PLANNING

The fifth step focuses on prioritizing recommendations to address inequities and developing recommendations into a one-year community action plan.

STEP 1:

Build the Foundation for a Strategic Participatory Approach
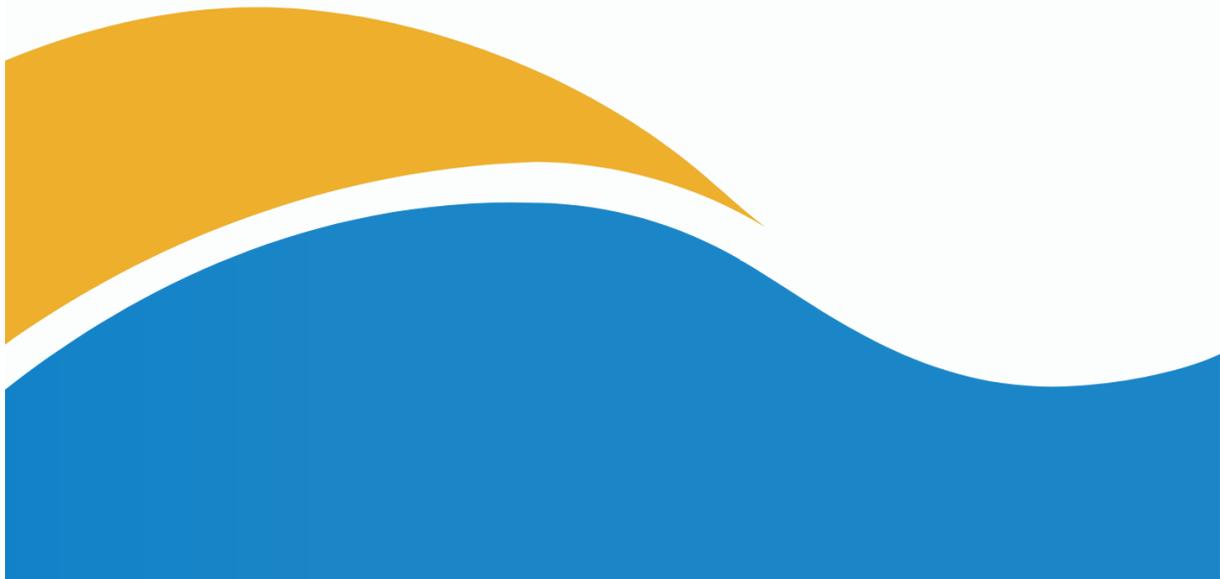
STEP 1: Build the Foundation for a Strategic Participatory Approach

> In this section:
> - Gain Organizational Leadership and Buy-in
> - Assess Internal Capacity

1.1. Gain Organizational Leadership and Buy-in

Gaining organizational buy-in is a critical step in implementing a successful strategic participatory approach. It involves securing the commitment and support of key decision-makers, including the Board, senior leadership, and other decision makers within the organization. This buy-in ensures that everyone in the organization is aligned with the project's goals and objectives, creating a foundation for a successful outcome.

The provided questions serve as a valuable framework. Engaging in open and constructive discussions around these key aspects can effectively convey the project's value, its alignment with the organization's mission, and its potential to drive positive change. It's essential to approach these questions with sensitivity to the perspective of the receiving audience, as this may influence the nature of your responses.

For instance, when responding to these questions, consider tailoring your explanations to highlight specific aspects that resonate with organizational leadership. This may include emphasizing how the project contributes to the organization's visibility, its impact on the budget, or its implications for public relations. By doing so, you can craft responses that not only address the core elements of the initiative but also align with the priorities and perspectives of the intended audience. This targeted approach ensures that your discussions foster a deeper understanding of the project's value.

- Addressing the Problem: Start by clearly defining the problem your project aims to address. **How will this initiative effectively tackle the identified problem?** Provide a comprehensive understanding of the issue and how the project's outcomes will contribute to its solution.

- Confidence in the Solution: Assess the extent to which organizational leadership is confident that the proposed effort will be an effective solution. **To what extent are you confident that the proposed effort will be an effective solution to the identified problem?** Discuss the evidence, research, or data that supports the project's potential to deliver positive results.

- Alignment with Mission and Values: Explore how the participatory approach aligns with your organization's mission and values. **How does it support and reinforce your organizational identity and commitment to specific principles and goals?**

- Organizational Leadership: Clarify why your organization is uniquely positioned to lead this effort or serve as a convener. **What unique qualities or strengths does your organization possess that make it well-suited to act as a convener?** Highlight the strengths, expertise, and resources that your organization brings to the table.

- Execution Capability: Evaluate the organization's capacity to execute the desired project effectively and innovatively. **To what extent is your organization able to effectively (and innovatively) carry out the desired project?** Discuss any relevant experience, capabilities, or strategies that demonstrate your readiness for the undertaking.

- Staff Resources: Consider whether the staff members who will contribute to this effort, both in the short and long term, have the necessary time available within the desired timeframe. **Do we have staff available to take on the work?** Address any concerns about workload and capacity.

- Championing Support: Identify whether other staff members are willing to champion the project within the organization. **Are other staff willing to champion your project?** Consider staff at different levels of the organization and with different skills and knowledge. Building internal advocates can be instrumental in garnering broader support.

- Resource Requirements: Outline the resources needed for the project, including funding, personnel, technology, and any other critical elements. Discuss the duration for which these resources will be required. **What resources will be needed, and for how long?**

Obtaining buy-in from organizational leadership and access to needed resources may require several conversations. Be sure to build in adequate time on the front end for this process, as well as time during the project to sustain the buy-in.

1.2. Assess Internal Capacity

Assessing internal capacity is not merely a checklist but a comprehensive process that encompasses people, resources, culture, and the organization's readiness to engage in a participatory process.

An assessment involves a critical examination of the team's readiness and capabilities to shoulder the tasks and responsibilities associated with the project. Simultaneously, it entails evaluating the organizational culture – explicit and implicit. Culture reflects biases, privileges, and limitations, which impacts how staff interact with partners and the relationships with community members. An organizational culture that values and actively practices transparency, collaboration, and equity lays the groundwork for meaningful and productive interactions with communities and partners.

Furthermore, assessing internal capacity is intertwined with the organization's readiness for embracing new approaches, adopting innovative practices, and adapting to ever-evolving dynamics. It serves as the foundational step that not only informs strategic decision-making but also assists in setting realistic expectations for project outcomes.

A key objective of this assessment is the identification of potential gaps or areas within the organization that may require strengthening. These gaps may manifest in various forms, including skill deficiencies, resource limitations, or structural constraints. Identifying these gaps in advance enables proactive measures to address them and navigate potential obstacles effectively during project execution. In sum, assessing internal capacity is an integral part of project planning, ensuring that the organization is well-prepared to navigate the complexities of the journey ahead and successfully achieve its desired outcomes.

Here are six areas of focus to assess within the organization before implementing a strategic participatory approach.

Table 3. Key Areas of Focus for Assessing Internal Capacity

Area of Focus	Key Questions to Consider
Organizational Commitment	• Is your organizational leadership ready and willing to commit resources and support a community engagement project? • Has the organization allocated funding and include the project in its annual budgeting and fundraising efforts?

	• Are there mechanisms in place to ensure ongoing leadership support throughout the project's duration?
Equity in Organizational Culture and Practices	• Has your organization causes harm to communities you want to engage? • Does your organization apply equity principles in your work, such as in your organizational mission/vision statement, organizational systems, organizational events/trainings, and organizational culture? • How are you ensuring that all staff, not only staff of color, are engaged in the outreach and engagement aspects of the project? • How does the organization address power imbalances that may exist between the organization and the community? • Are there feedback mechanisms in place for community members to voice concerns about equity and power dynamics within the organization?
Organizational Cultural Humility	• How does the organization actively seek to learn about and respect the cultural values and traditions of the community? • How does your organization address cultural misunderstandings or conflicts that may arise? • Does your organization have experience working with diverse communities?
Staffing Capacity	• Does the team representative of the community? • Does the team collectively include the needed skills, knowledge, and connections? • Is there a clear understanding of the workload that community engagement projects may place on staff members? • Does the organization provide professional development opportunities for staff to enhance their community engagement skills? • How does the organization ensure that staff members have the necessary support and resources to balance project needs with their other responsibilities?
Budgetary Capacity	• Does your budget truly cover the cost of community engagement? • Are there funding restrictions?
Partnership Capacity	• Is your team skilled in initiating and sustaining partnerships? • How does the organization assess the readiness and willingness of potential partners to collaborate effectively?

	• Are there established communication and collaboration protocols for maintaining and nurturing community partnerships over time?

Organizational Commitment

Key Questions to Consider
• **Is your organizational leadership ready and willing to commit resources and support a community engagement project?** • **Has the organization allocated funding and include the project in its annual budgeting and fundraising efforts?** • **Are there mechanisms in place to ensure ongoing leadership support throughout the project's duration?**

Readiness for a strategic participatory approach requires buy-in and willingness from leadership and/or decision makers to commit to and support your project. Obtaining buy-in from organizational leadership and access to needed resources may require several conversations. Be sure to build in adequate time on the front end for this process, as well as time during the project to sustain the buy-in.

However, gaining and sustaining their commitment may not always be straightforward, and it's essential to understand some of the reasons leaders might hesitate or not agree with this approach. Leaders may be unfamiliar with the concept of strategic participatory approaches and may not fully comprehend how they work or their potential benefits. Concerns about resource allocation - time, budget, or staff - can be a significant barrier. Resistance to change is a common factor. Leaders may be accustomed to traditional top-down decision-making and may resist adopting a more collaborative and participatory model.

Here are strategies that can be implemented to address concerns and secure leadership buy-in:

Present at Standing Leadership Meetings: Schedule dedicated time during regular leadership meetings to present the strategic participatory approach. Provide a comprehensive overview of the approach, its goals, and anticipated benefits. Use this opportunity to address any questions or concerns from leaders directly.

Organize Workshops or Training Sessions: Host workshops or training sessions specifically designed for organizational leaders. These sessions can delve into the principles and methodologies of the participatory approach, providing leaders with a deeper understanding of how it works and its potential benefits.

Share Success Stories and Case Studies: Compile success stories and case studies from organizations that have successfully implemented similar participatory approaches. Share these examples with organizational leaders to illustrate the positive impact such approaches can have on outcomes and community relations.

Hard and Soft ROI Messaging: Use data and projections to demonstrate that the investment in this approach can potentially yield tangible financial returns over time. Highlight how it can lead to cost savings, increased efficiency, and improved resource allocation. Beyond monetary gains, emphasize how the participatory approach can enhance the organization's visibility in the community, strengthen its reputation as a collaborative and responsive entity, and open doors to new partnerships and funding opportunities. Being clear about the ROI at the beginning of the project will help define metrics and tracking mechanisms to effectively measure and assess the success of the investment over time.

Equity in Organizational Culture and Practices

Key Questions to Consider
• **Has your organization causes harm to communities you want to engage?** • **Does your organization apply equity principles in your work, such as in your organizational mission/vision statement, organizational systems, organizational events/trainings, and organizational culture?** • **How are you ensuring that all staff, not only staff of color, are engaged in the outreach and engagement aspects of the project?** • **How does the organization address power imbalances that may exist between the organization and the community?** • **Are there feedback mechanisms in place for community members to voice concerns about equity and power dynamics within the organization?**

Understanding Intersecting Systems of Oppression

Inequities are shaped by pervasive and oppressive societal systems, including systemic racism, classism, xenophobia, and sexism, among many others. These systems influence the social determinants of health[1]—the conditions in which people are born, live, work, and spend their time—as well as shape access to opportunities, resources, and decision-making processes within communities. By recognizing and acknowledging these systemic injustices, community and partnership engagement efforts can move beyond addressing surface-level symptoms and focus on tackling the root causes of disparities. This approach not

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[1] Social Determinants of Health (U.S. Department of Health and Human Services)

only signifies a commitment to transparency but also demonstrates a willingness to rectify past wrongs, which, in turn, fosters trust, minimizes conflicts, and mitigates tension. Overall, it leads to more effective, contextually relevant, and sustainable solutions that collectively embraced.

Importantly, these systems are interrelated, with many people and communities experiencing multiple forms of oppression simultaneously. For example, Black women are typically paid only 67 cents for every dollar paid to white men, and the wage gap widens to 65 cents on the dollar for Black women who hold doctorate degrees compared to white men with the same education. This adds up to a loss of $53,334 a year, and more than $2.1 million over the course of a 40-year career.[2] Intersectionality helps in recognizing that individuals' experiences are shaped by multiple systemic barriers based on race, gender, socioeconomic status, and more. Projects using strategic participatory approach must have a deeper understanding of the complexities of human experience, leading to more nuanced and impactful strategies.

> **Intersectionality**, a term coined by Kimberlé Crenshaw,[1] acknowledges the way that a person's multiple identities shape their experience in the world, due to society's interlocking systems of oppression.

Embedding Equity into Organizational Culture

In addition to gaining insights into the key drivers of inequity, your project can proactively prepare for a strategic participatory approach by examining how your organization incorporates equity into its culture. Embedding equity into your organization's culture is not only a forward-looking step to prepare for participatory initiatives but also a tangible demonstration of your commitment to equity and inclusion. This intentional effort sets the stage for an environment where diverse voices are not just welcomed but valued, and where decisions are guided by principles of fairness and justice. By addressing these aspects first within your organization, you will be better positioned to engage communities and partners. Hence, your organization can cultivate a culture that doesn't merely talk about equity but actively embodies it in every facet of its work. Here are some best practices in embedding equity into organizational culture.

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[2] It's Time to Pay Black Women What They're Owed (National Women's Law Center)

Prioritize Equity in Vision and Mission: Ensure that the organization's commitment to equity is reflected in its core values and mission statement. This sets a clear direction and reinforces the importance of equity as a foundational principle.

Create Public Accountability: Develop mechanisms that make everyone – leaders, managers and employees – accountable. Include equity-related goals in performance reviews for individuals as well as departments. This ensures that the commitment to equity is not just theoretical but is also reflected in the practical actions and achievements of the organization.

Regular Reflection and Learning: Encourage a culture of learning and reflection where employees at all levels regularly consider how their actions and decisions contribute to or detract from equity. This can be facilitated through regular feedback sessions, reflective practices, and continuous learning opportunities.

Go Beyond Training: Regular training programs are crucial to support individual learning and establish a shared language and understanding about equity. However, it is only a starting point. Trainings or other types of sessions (e.g. strategic planning) should identify and develop a plan for what is being learned to be implemented within the organization.

Use a Data-Oriented Approach: Conduct an assessment to serve as a baseline and identify areas of inequity within the organization. This can include disparities in pay, promotion rates, and employee satisfaction across different demographic groups. Use this data to inform policy changes and targeted initiatives. Continuous monitoring and evaluation allow for tracking progress over time and adapting strategies as needed.

Implement Comprehensive Policies: Policies should be regularly reviewed and updated to ensure they align with current best practices in equity. This includes not only HR policies covering all aspects of the employee life cycle from recruitment to retirement but also policies related to procurement, partnerships, and business practices.

Create an Employee Support Structure: Employee Resource Groups (ERGs or Affinity Groups provide a forum for employees from similar backgrounds or with shared interests to support each other and raise awareness about their experiences. These groups are also essential in providing feedback directly to leadership and recommending strategies to improve policies and practices.

Balancing Power Dynamics

> **Power** is dynamic and relational, rather than absolute — it is exercised in the social, economic, and political relations between individuals and groups. It is also unequally distributed – some individuals and groups have greater control over the sources of power and others have little or no control. The extent of power of an individual or group is correlated to how many different kinds of resources they can access and control.[1]

In strategic participatory approaches, recognizing and responsibly managing power dynamics is essential for effective and equitable engagement with communities and partners. As the convener, your organization inherently possesses considerable power, particularly in terms of resources, decision-making, and influence. It's vital to critically assess and understand this power imbalance. This involves acknowledging how systemic inequalities and historical contexts have shaped current power structures. Your organization should strive to create a transparent and inclusive process where power is shared, and the voices of all partners, especially those traditionally marginalized, are heard and valued. Setting clear expectations about the role and extent of your organization's influence in the process is crucial. By doing so, you can mitigate the risk of unintentional inequities or strained relationships, fostering a more collaborative and respectful partnership dynamic.

Power within organizations and communities manifests in various forms, each carrying significant impact on how decisions are made, policies are formed, and outcomes are shaped. Understanding these different forms of power is crucial[3]:

- Power to Name or Define: This is the ability to label or characterize situations, problems, or groups. It's a powerful form of influence as it shapes perceptions and frames the narrative around an issue or a group of people.
- Power to Set Rules, Standards, or Policies: This involves establishing the guidelines or norms that govern behavior and actions within an organization or community. Those who set these standards have the power to determine what is considered acceptable or unacceptable, shaping the operational and ethical landscape.
- Power to Change Rules, Standards, or Policies: Beyond setting initial standards, having the authority to alter them in response to changing needs or circumstances is a significant form of power. This can be used to address

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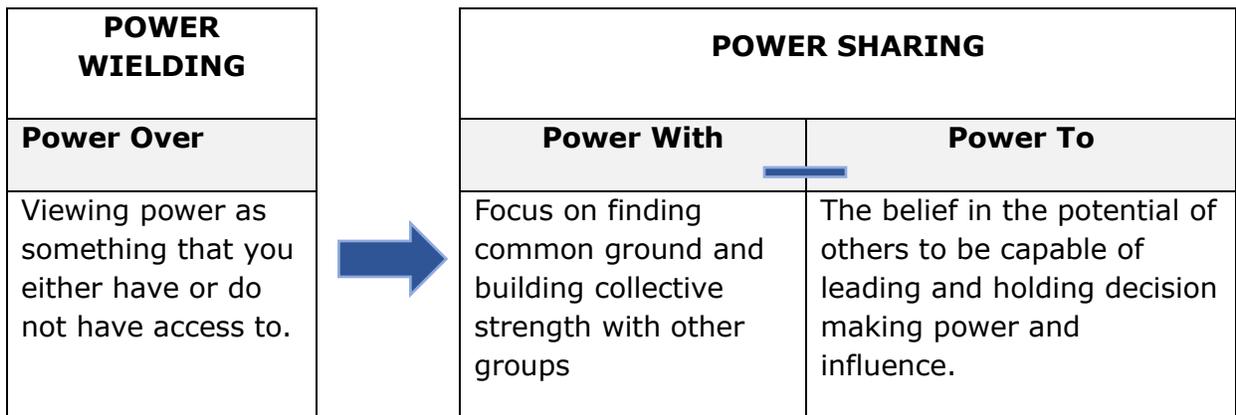[3] Alberta Civil Liberties Research Centre, "Racism and Power" (2018) / "CARED Glossary" (2020).

inequities or adapt to new challenges but can also be wielded to serve personal or institutional interests.

- <u>Power to Influence Decision-Makers</u>: This is the capacity to sway the choices of those in positions of authority. It can be exercised through persuasion, advocacy, or lobbying, and is often critical in advancing causes, issues, or concerns.

Power does not operate in a vacuum - it manifests within and across the personal, social, institutional, and structural levels.[3]

The "power over, power with/to" framework[4] is a concept that helps in understanding different approaches to wielding power, especially in the context of organizations working towards greater equity and impact.

Figure 3. The 'Power over, Power with/to' Framework:

POWER WIELDING	POWER SHARING	
Power Over	**Power With**	**Power To**
Viewing power as something that you either have or do not have access to.	Focus on finding common ground and building collective strength with other groups	The belief in the potential of others to be capable of leading and holding decision making power and influence.

By exploring the following questions, an organization can gain a deeper understanding of how the 'power over, power with/to' dynamic operates within its structure and the impact it has on both internal and external equity. This introspection is crucial for identifying areas where power can be redistributed or shared.

Power Over

1. In what ways does our organizational structure or leadership style reinforce hierarchical power dynamics?"

[4] Bartczak, L. (2021). Three Frameworks for Shifting Power for Greater Equity and Impact. https://communitywealth.com/three-frameworks-for-shifting-power-for-greater-equity-and-impact/

2. How often do we rely on authoritative decision-making rather than collaborative processes?
3. How does our organizational power structure impact the distribution of resources and opportunities?
4. In what situations might our policies or practices unintentionally exert undue pressure or influence on employees, communities, or partners?
5. In what ways might our organizational influence be contributing to wider societal inequalities?

Power With

1. How do we ensure that all team members, regardless of their rank or role, feel empowered to contribute their ideas and expertise?
2. What mechanisms do we have in place to handle conflicts or disagreements in a way that respects and integrates diverse viewpoints?
3. How do we encourage open dialogue and transparency in our operations?"
4. How does our organization engage with partners and communities in a way that builds and shares power?
5. What strategies do we use to ensure that our partnerships are based on mutual respect and collaboration?

Power To

1. How do we support and encourage continuous learning and skill development?
2. How does our organization support partners and communities we interact with?
3. What strategies do we employ to support others outside our organization to develop their own capacities and achieve their goals?
4. What are the limitations to the amount of power I can relinquish in this process?
5. What does it look like for me to entrust decision making to others?

Organizational Cultural Humility

Key Questions to Consider
• **How does the organization actively seek to learn about and respect the cultural values and traditions of the community?**
• **How does your organization address cultural misunderstandings or conflicts that may arise?**
• **Does your organization have experience working with diverse communities?**

Cultural biases, whether implicit or explicit, hold the potential to impact every facet of a strategic participatory approach. These biases dictate which voices are acknowledged and esteemed and influence the degree of comfort when collaborating with individuals from diverse communities. Cultural bias can reinforce power imbalances, with certain groups or individuals holding more influence in decision-making processes, sidelining others and perpetuating inequities.

Prior to embarking on a process that involves engaging communities and partners, it is imperative for your organization to foster an awareness of how your individual and collective culture and cultural biases influence your work. Being mindful of the role that culture and cultural bias play in community-centered initiatives is essential in recognizing potential pitfalls and devising strategies to counteract the influence of such biases.

To explore how culture and cultural bias shows up in your organization and staff, consider the following questions:

Table 4. Questions Exploring Culture and Cultural Bias

	Reflection Questions
Individual Reflection Questions	• What social identities and cultural groups do you belong to? Consider factors like race/ethnicity, culture(s), gender identity, sexual orientation, income level, education level, age, ability/disability. • What assumptions or stereotypes do you hold about the community you are engaging? • How could your assumptions negatively impact your interactions or efforts? • How do your cultural norms and values align with those of the community?
Organizational Reflection Questions	• Are there efforts to be inclusive and respectful of diverse identities? • Does your organization engage in any training or capacity-building to improve practices working with local diverse communities? • Are issues of racism, discrimination and power imbalance discussed transparently? • Have there been missteps in past projects that have harmed community trust? • Have we made any adjustments based on feedback from community members or partners about cultural insensitivity or bias?"

Project-specific Reflection Questions	• Are you the most effective team to be leading this engagement effort, or should you work with or through partners
	• How do your social identities and cultural groups shape your views about the community you are seeking to engage?
	• Is there equitable representation of the community within the project team and decision-making processes?
	• In what ways have we considered and incorporated the cultural context and norms of the communities we are engaging with?"
	• Do our communication methods and engagement strategies consider the cultural sensitivities and preferences of the community?
	• Have we provided accessible and culturally appropriate materials and resources throughout the project?

Staffing Capacity

Once you have obtained organizational buy-in and deepened your understanding of how culture, power, and other equity-related dynamics may show up in your project, you are ready to build your internal project team. There is no one right way to accomplish this task, as there are many factors that will inform how your internal team is structured, such as the availability of resources to hire or allocate staff time to the project, and the skills sets required.

Responsibilities of the Internal Team

Members of the internal team are responsible for supporting the daily administrative needs of the project, ensuring that program goals are met, and addressing or mitigating structural or organizational barriers that impede project activities. The specific tasks can vary but often include a range of duties such as:

Table 5. Team Responsibilities by Area

Area	Responsibility
Coordination	• Identify potential risks and challenges that could impact the project and developing strategies to mitigate them • Monitor compliance with legal, ethical, and organizational standards

	• Develop project overview and progress reports • Cultivate relationships across all individuals and organizations involved • Keep organizational leadership informed of successes and challenges
Data and Evaluation	• Designing benchmarks and criteria for evaluation • Analyzing data • Report the outcomes
Resource Management and Logistics	• Solicit, hire, and manage project consultants • Meeting planning and facilitation • Manage project budget and expenses
Communication	• Promote milestones and successes • Monitor communication channels (e.g. email, social media, newsletter)
Community / Partner Engagement and	• Identify and recruit community residents and organizations, and partners • Maintain regular communication to ensure their ongoing involvement and to gather feedback • Building and nurturing relationships to facilitate collaboration and trust
Sustainability	• Identify and write grants • Network with funders and investors

Potential Internal Team Roles

The three common roles on internal project teams responsible for implementing strategic participatory approaches include: (i) Project Director, (ii) Project Manager, and (iii) Community Engagement Coordinator.

Figure 4. Common Roles for Projects Using Strategic Participatory Approaches

Project Director (0.25-0.5 FTE)	Project Manager (0.5-0.75 FTE)	Community Engagement Coordinator (1.0 FTE)
• Accountable for the overall project scope and success	• Often assists the project manager with daily administrative tasks such as documenting outcomes,	• Responsible for designing and leading implementation of

• Lead decision maker for how project activities will be designed, implemented, monitored, and reported • Official point of contact for the project • Manages the project budget	maintaining monitoring tools, coordinating resources, and disseminating information • Depending on skill set and project need, may also lead community recruitment activities and data collection tasks	community outreach, relationships, and engagement activities • Main liaison and builder of trust between the rest of the project team and the community
Other position titles for this role may include: • Project Director • Project Lead • Team Lead • Project Officer	*Other position titles for this role may include:* • Project Coordinator • Administrator • Project Assistant • Project Specialist	*Other position titles for this role may include:* • Community Liaison • Community Outreach Specialist

Additional roles on an internal team may include:

- *An evaluator or data lead* – responsible for managing the collection, analysis, visualization, and interpretation of data to showcase project outcomes and support ongoing quality improvement.

- *A communications lead or specialist* – design and implement internal and external communication efforts, such as marketing, recruitment, and dissemination materials.

Regardless of your internal team composition, it is critical that your project offers staff sufficient time to fully support and prioritize related activities. This may require discussions with organizational leadership around workload allocations and staffing. Your project is unlikely to be successful in engaging community if baseline workloads are stretching team members thin. Moreover, if your internal team—especially your community engagement coordinator role—experiences frequent turnover, you may lose trust in the community.

Recruiting and Selecting Staff

While having staff having the capacity is a critical factor, it's only one aspect to consider when staffing projects using strategic participatory approaches. It is essential to identify individuals within your organization who are not only excited about the project but also possess the capabilities to champion it effectively. Hence, review of the skills, knowledge, and experience that staff members bring to the table. Successful implementation of participatory projects often requires a diverse set of competencies, including:

- community outreach and engagement experience
- project management skills
- communication skills
- conflict resolution skills
- facilitation experience
- ability to navigate complex power dynamics

In addition, look for staff who are adaptable and open to learning from community and partners. Adaptability is key to adjusting strategies and approaches based on community feedback and evolving needs.

By assessing your team's readiness in terms of both availability and qualifications, you can ensure that you have the right individuals in place to drive the project forward effectively. Furthermore, it's important to consider whether the composition of your internal team reflects the diversity and backgrounds of the communities you aim to engage. This diversity can enhance the project's ability to connect with various partners and foster a more inclusive and equitable participatory process. Overall, the selection of the internal team plays a crucial role in the success of strategic participatory approaches, and a thoughtful approach to staffing can make a significant impact on the project's outcomes and social impact.

Filling Gaps in Staff Capacity

Sometimes it will not be possible to staff your internal team with the full capacity needed for a strategic participatory approach. While capacity gaps may be a warning sign that your organization should pause before moving forward, sometimes it is appropriate to fill these gaps via:

- internal training—such as training on community engagement, cultural topics specific to the community in which your project takes place, or technical skills like data collection or evaluation,

- external partnerships—such as collaborating with an organization already deeply rooted in the community to support recruitment and advise implementation, and

- hiring of consultants who can fill technical or administrative gaps in your team's capacity, such as[5]: knowledge and expertise related to an issue, knowledge of a process (e.g., evaluation, strategic planning, facilitation, community organizing), expertise in a specific area (e.g., outreach, policy), an extra set of hands to carry out a time-limited task (e.g. graphic designer), or an outside perspective.

Figure 5. Checklist to Explore Hiring a Consultant

	No	Unsure	Yes	If you responded "No" or "Unsure"
My project team currently possesses the knowledge and/or needed skills sets:				
…. to design a strategic participatory approach for my project.	☐	☐	☐	You may want to consider bringing on a strategy consultant.
….to perform data collection, data analysis and/or project evaluation tasks needed for my project	☐	☐	☐	You may want to consider bringing on an evaluation consultant.
… facilitate meetings and strategy sessions.	☐	☐	☐	You may want to consider bringing on a strategy consultant or a facilitator.
…. to ensure the project implementation process will be equitable, inclusive and advance racial justice.	☐	☐	☐	You may want to consider bringing on a strategy consultant or DEIJ* consultant.

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[5] The Community Toolbox. (n.d.). Choosing a Consultant. https://ctb.ku.edu/en/table-of-contents/structure/training-and-technical-assistance/choosing-consultants/main

…to recruit and engage members of the target population.	☐	☐	☐	You may want to consider bringing on a strategy consultant or community organizer.

*DEIJ – diversity, equity, inclusion, and justice

Budgetary Capacity

Creating a budget that truly covers the cost of a project engaging communities and partners is fundamental to the success of a strategic participatory approach. Budgets that do not appropriately accommodate for needed expenses run the risk of forcing teams to cut corners and/or skip critical activities. Access to sufficient resources typically requires buy-in from leadership. Examples of items that should be budgeted in a strategic participatory approach include:

- Internal staff/personnel, including consultants
- Compensation for community members and partners who serve a specific role on the project (e.g., members of a Community Action Board)
- Compensation for community members and partners who participate on an ad hoc basis (e.g., attend a meeting to share input; help with one-time data collection)
- Facilities (e.g., meeting spaces)
- Technology (e.g., computers, phones, survey platforms, marketing platforms, recording devices)
- Supplies/Materials (e.g., facilitation supplies, printing, meals)

Whenever feasible, solicit input from the community and partners regarding the adequacy of the budget. This step is instrumental in ensuring that the financial resources allocated to your project align with the genuine needs of individuals and organizations that will be engaged. By actively seeking feedback, you are not only fostering transparency, but it also serves as a mechanism for accountability and oversight.

IN PRACTICE
Prosperity Broward Economic Mobility Pilot Budgetary Capacity
During its Lauderdale Lakes Economic Mobility pilot, Prosperity Broward was intentional in allocating funding to support community members in participating. For example, they made sure there were meals and childcare at every meeting. In addition, community members on the Community Action Board received a stipend for each meeting attended.

Partnership Capacity

To employ a strategic participatory approach, your organization's team must have the capacity to fully engage in moving authentic partnership with the community forward. This requires a commitment to and time for building trust with community, nurturing existing relationships, and strengthening new relationships. In participatory processes, it is common to underestimate the amount of time and effort needed to truly engage communities in a meaningful and mutually beneficial way. If expectations are not aligned with reality, a project may experience detrimental consequences, including project failure, community dissatisfaction, and harm to the organization's reputation.

Reflecting on your team's capacity for partnership, while questioning common assumptions can help predict barriers, prevent mistakes, and ensure that the resources allocated will be sufficient for effective engagement. Figure 6 shares some common assumptions to avoid when planning for community engagement and partnership.

Figure 6. Common Misassumptions About Community Partnerships

Assumption to Avoid	Key Considerations
Expecting that communities will quickly buy-in. While there may be many organizations and constituents who are interested in your effort, building partnerships and cultivating buy-in often takes time and repeated conversations before communities are ready to engage.	• Allocate time and resources to understand how interested constituents and the community and how you might promote or market your project to their interests • Think about community engagement as an ongoing process that will require time and resources along the way
Expecting that communities will devote as much time as is needed. Amid the excitement of a new program or initiative, community organizations and members may be excited to contribute. Realistically, those commitments may be overshadowed by other priorities.	• Allocate time and resources to collaborate with community members in order to establish a practical time commitment • Plan to make community participation as low-barrier as possible by establishing a range of ways that communities can contribute (such as meetings that take place outside of the workday, both physical and virtual options, both synchronous and asynchronous options)

Expecting that everyone's priorities and goals are aligned with your effort. Although you might believe the goals of your initiative align with those of your partners or community members, your partners may feel differently.	• Carve out time and resources to understand the priorities of partner organizations to assess true alignment. Consider how you can reciprocate with partner organizations by offering support for their other priorities. • Plan to facilitate opportunities to hear the concerns, barriers, and goals directly from community members who would most benefit from the initiative. Use that information to shape your planning.
Expecting the community to be familiar with your planning process. Once community organizations and members are committed to your project, diving into a multi-stage planning process may feel like a natural next step. However, jumping in too quickly can overwhelm community members and make them feel like they do not have a voice in the process.	• Plan to offer a step-by-step introduction to your intended process and explain how each part contributes to the overarching goals. Ask for feedback about the process to better understand how you might adapt the process to allow for community participation.
Expecting the community engagement process to be linear. Anticipating a linear trajectory for community engagement limits its effectiveness and overlooks its dynamic nature. Applying a rigid community engagement plan will likely exclude key voices and result in a project that is unresponsive to community needs. engagement is a flexible and adaptive process that requires openness to change. Acknowledging the diverse and ever-changing nature of communities, it is crucial to approach engagement with flexibility.	• Make your plan for community engagement flexible and adaptive, with openness to change. • Embrace different perspectives and use them to adjust strategies based on community feedback and external circumstances.

STEP 2:

Conduct an Environmental Scan

STEP 2: Conduct an Environmental Scan

> In this section:
> - Gaining Baseline Understanding of Community Context
> - Identifying Potential Partners

Before launching a project and initiating engagement with the community and partners, it is important for your organization to establish a baseline understanding of the issue or challenge being addressed. This entails gaining insight into the broader context, such as what is currently occurring in relation to the issue or challenge, who is actively involved in addressing it, and what strategies, interventions and/or services address the issue. Additionally, this process requires knowing the perspectives, opinions, and concerns of the community members directly impacted by the issue.

This baseline understanding serves as the initial compass guiding your strategic participatory approach. You will be able to document current efforts, identify potential areas of collaboration, avoid redundancy, and ensure that your resources are channeled efficiently to address unmet needs and concerns. It can also aid in defining the issue to focus on and identifying the population within the community that is most in need.

> An **environmental scan is** a process of gathering, analyzing, and interpreting information about the external factors and conditions that can impact an organization, project, or initiative.

2.1. Gaining Baseline Understanding of Community Context

When conducting an environmental scan, it's essential to gather information about the community's demographics, culture, social dynamics, and needs. This understanding helps you not only identify the unique strengths, challenges, and opportunities within the community but also ensures that your project is relevant and responsive to their specific context.

Inequities have deep historical roots. Historical injustices, discriminatory policies, and systemic biases have left generational impacts on marginalized communities. By examining the history of a community and its residents, you can trace the origins of these inequities and gain a clearer understanding of the present-day

disparities, challenges, and opportunities that a community faces. In addition, you can identify how the community's history aligns with the migration of diverse immigrant communities and the implications of gentrification on long-standing residents.

However, in many cases where inequalities exist, historical grievances and tensions still affect community dynamics. This exploration could be traumatizing for staff, as well as community members; hence, it is important to approach the process using a trauma informed approach and ensuring safety measures and appropriate mental health supports are in place.

There are several common methods for gathering information about the community context, including surveys listening sessions and publicly available data at the local, state and federal level. These methods, when used in combination or separately, equip organizations with preliminary information at the unique challenges and opportunities presented by each community they seek to engage with.

Table 6. Common Methods for Gathering Preliminary Data About Community Context

	Survey	Listening Session	Publicly Available Data
What Is it?	• Primary data collection source • Can collect both quantitative (numeric) and qualitative (non-numeric) information • Can be administered as a written questionnaire (via email, postal mail, in-person or on a web page) or verbally	• Primary data collection source • Typically collects qualitative (non-numeric) information • Brings together participants from a community or social group to share their perspectives, experiences and/or recommendations on a specific topic	• Secondary data collection source • Examples include statistics, findings from previous research studies or reports related to your project's focus, or less formal sources (like newspaper articles) that give insight into your project's context
When should it be used?	• When you need a relatively efficient way to get information that	• Where there is a need for a deeper discussion, especially among a	• When the information you need is publicly available through local or national data

	is not already publicly available • When you need to reach a large number of people	specific community or community sub-group • When there are gaps in knowledge or understanding that cannot be explained through surveying or publicly available data	sets or credible reports, media articles, or websites
Limitations	• Difficult to ensure you are reaching your target population • Takes expertise, time, and resources to design, administer, and analyze	• Can be hard to schedule, especially if community relationships are not yet strong • Takes expertise, time, and resources to design, administer, and analyze	• Data may be outdated or not specifically relevant for your population • Requires knowledge of how to identify and synthesize data from a wide range of possible sources

IN PRACTICE
Prosperity Broward Economic Mobility Pilot Data Working Group

Prior to the launch of their pilot project, the Data Working Group collected preliminary data. Using publicly available data, a detailed analysis of local communities in Broward County was conducted to identify the geography and population experiencing the greatest need in Broward County. The variables used included: Per capita income, poverty rate and educational attainment, as well as organizational capacity and political will. Mothers who were head of household in Lauderdale Lakes were identified as the segment of the overall Broward County population experiencing the highest level of disparities.

In addition, Prosperity Broward conducted a series of listening sessions to identify key barriers to mothers' ability to maintain a high potential job. These sessions were facilitated by an external consultant and attended by a diverse range of community members. During the listening sessions, participants shared their

thoughts and perspectives on systemic and organizational barriers to economic mobility within Broward County.

A common theme was the need to develop a process in which members of the community could map the assets of the community, build relationships, identify how they want to engage with high wage/high potential job opportunities, and discuss how they want to support mothers and their families. With this information, the Prosperity Broward team sought out and eventually secured a consultant with the skills needed to co-design and support the facilitation of the community and partner engagement process.

2.2. Identifying Potential Partners

Engaging partners allows for your organization to tap into a broader pool of expertise, resources, and perspectives. Partners should be from various sectors, such as nonprofit organizations, government agencies, local businesses, educational institutions, faith organizations, and community organizations (e.g. neighborhood coalitions, advocacy groups, civic associations). The diverse experiences, knowledge, and skill sets, enrich the collective problem-solving and implementation capacity. These partnerships also facilitate the pooling of resources, reducing the burden on any single organization and increasing the overall capacity to effect meaningful change.

To identify and select partners effectively, it's crucial to be intentional in your approach. Being deliberate in the process reduces biases, opens doors to engage with new and diverse organizations, and allows you to connect with established and respected entities that can bridge the gap between your project and the community you aim to impact. When community members see familiar and trusted entities involved, their active engagement becomes more likely, further enhancing the project's chances of success.

As you compile your list of potential partners, consider the following questions:

1. How do potential partners' priorities, needs, interests, resources, and assets align with the project?
2. Why might different types of partners want to participate in your project? (What's in it for them?)
3. What existing partnerships or networks do you have that can be leveraged or strengthened for the project?
4. Are there any opportunities to build new partnerships with groups whose mission aligns with your project?

5. Are there community relationships that will need repair, and how can you repair them?
6. Do partners reflect the community you're trying to serve?

IN PRACTICE
Prosperity Broward Economic Mobility Pilot Community Mapping
Prosperity Broward invited organizations working on economic mobility (e.g. service providers, training and career advancement programs, educational institutions, etc.) to join a "Community Mapping" session in January 2023. Participants discussed similarities and differences between economic mobility initiatives in the city and identified new organizations, collaboratives, or other resources to engage in the Lauderdale Lakes pilot economic mobility project. The Community Mapping Process also helped to increase awareness about the pilot project.

There are several methods to conduct an environmental scan that supports identifying and selecting partners. Here are some common methods:

**Table 7. Common Methods to Identify and Select Partners**

Method	Description
Community Mapping	Community mapping is a process of visually representing and documenting the assets, resources, institutions, features, and social networks within a specific community or geographical area. It involves creating maps that highlight important locations, services, organizations, and natural elements within a community.
Rapid Assessment	Rapid assessment is a method used to quickly gather information and insights about a specific situation, issue, or community. It involves the collection of data, often within a short timeframe, to provide a snapshot of the current conditions or to assess the immediate needs, risks, or opportunities.
SWOT Analysis	SWOT analysis, which stands for Strengths, Weaknesses, Opportunities, and Threats, is a tool used for assessing the current and future potential of an organization or situation. Through SWOT analysis, both internal factors, such as strengths and weaknesses, and external factors, such as opportunities and threats, are identified and examined. This helps in making informed decisions and formulating strategies to effectively address challenges, capitalize on opportunities, and achieve objectives.

Stakeholder Analysis	Stakeholder analysis is a process of identifying and assessing the various individuals, groups, organizations, or entities that have an interest or stake in a particular project, program, or initiative. It focuses on understanding the interests, needs, and influence of different stakeholders (power) and categorizing them based on their level of interest and influence / power.

STEP 3:
Launch the Process
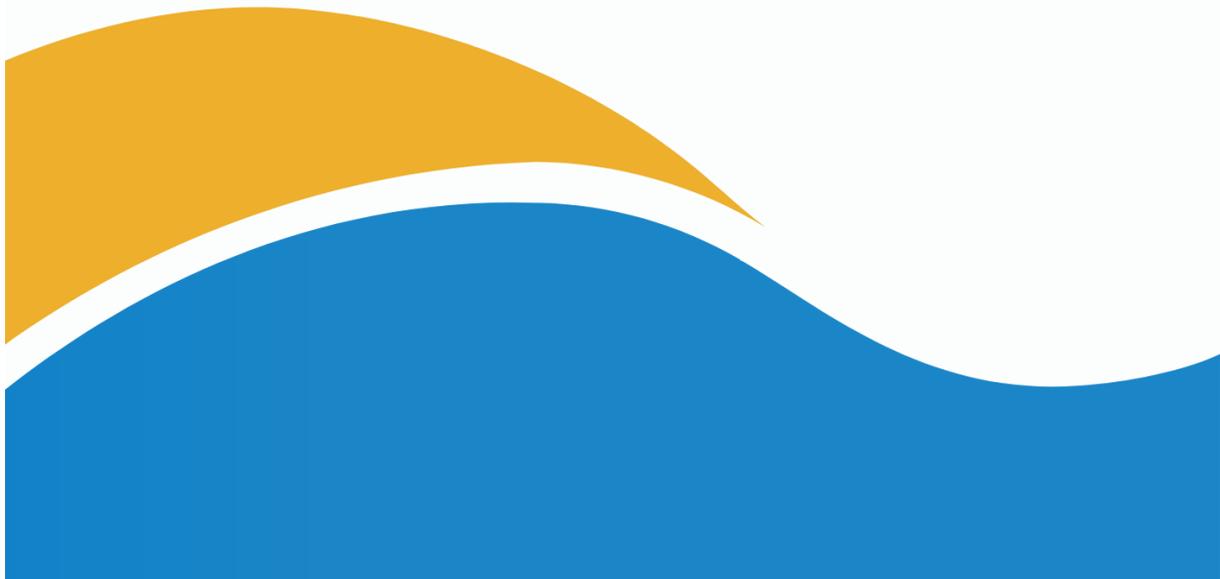
STEP 3: Launch the Process

> In this section:
> - Define Community and Partner Level of Engagement
> - Level Setting: Establish Shared Language, Values and Expectations
> - Maintain Continuous Engagement

## 3.1. Define Community and Partner Level of Engagement

After identifying and communicating with partners, it is important to determine the extent to which you will engage them and the community. Engagement is defined by a framework of guiding principles, strategies, and approaches. It operates along a continuum that encompasses a spectrum of involvement, ranging from inform, consult, involve, collaborate, to empower[6]. This continuum allows organizations to tailor their engagement strategies to the specific needs and objectives of each project, ensuring that the level of engagement aligns with the desired outcomes and the values of meaningful community participation. It acknowledges that not all engagements are created equal and that the depth and intensity of engagement should be responsive to the unique context and goals of each initiative.

As noted in Figure 7, at one end of the spectrum, the **"inform"** stage represents minimal engagement, where organizations simply provide information to the community or partnering organizations without active participation. Moving along the continuum, **"consult"** involves seeking input and feedback from the community but may not necessarily incorporate their suggestions into decision-making processes. The **"involve"** level entails deeper engagement, where community members or partnering organizations are actively engaged in decision-making processes, and their input is considered in shaping outcomes. **"Collaborate"** takes engagement a step further, emphasizing active partnership and co-creation, where organizations work hand-in-hand with the community to achieve shared goals. Finally, at the far end of the continuum, **"empower"** signifies the highest level of engagement, where communities have full control and ownership of decision-

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[6] Adapted from the IAP2 Spectrum of Public Participation

making, resources, and actions, promoting a sense of self-determination and autonomy.

Figure 7. Spectrum of Community Engagement
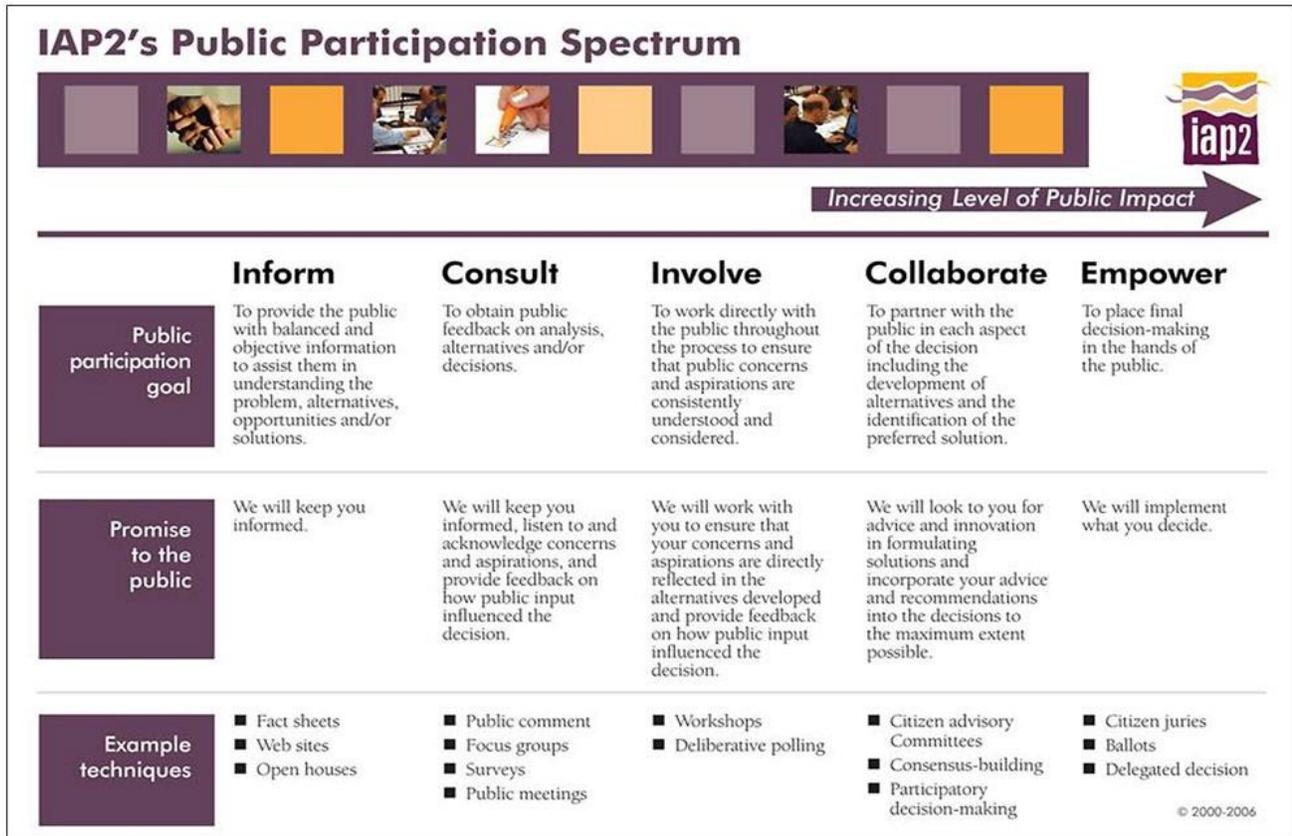
Taking the time to reflect and determine the level of engagement you want to take on is critically important. Not only should you consider resources, capacity, and capabilities, but also your readiness to embrace a power shift, including relinquishing control over decision-making processes. Failing to engage in this intentional reflection can result in a less effective and equitable participatory process. Here are some reflection questions:

1. How deeply do we understand the power dynamics within our organization and in our engagement with the community?
2. Are we fully prepared to change the power dynamics in our decision-making processes?
3. What specific leadership qualities and infrastructure are necessary to support this shift?
4. What potential risks might we face when shifting power dynamics, and how can we effectively mitigate them?
5. How comfortable are we with the uncertainties that arise from sharing control in decision-making?

6. How do we plan to handle situations where collective decisions diverge from our initial expectations for a project?
7. Are we equipped to handle all potential outcomes, whether they are positive or challenging?
8. What are our non-negotiable factors or principles in this process of power shifting?
9. How open and flexible are we in adapting our approach based on new learnings and insights?
10. What specific training or development is required to facilitate this power shift?
11. Which indicators will we use to measure the success of this shift and identify areas for improvement?

3.2. Level Setting: Establish Shared Language, Values and Expectations

"Level-setting" is a process used in organizational and collaborative contexts to establish a common understanding and alignment among community and different partners. It involves defining and agreeing upon key aspects such as goals, expectations, roles, responsibilities, and the scope of a project or initiative. The purpose of level-setting is to ensure that everyone involved has a clear, consistent understanding of the objectives and how they will be achieved.

This process should not be rushed. It sets the foundation for a shared vision which improves collaboration and engagement. Level-setting is the initial step and outcomes can be revisited as needed to maintain alignment throughout the course of a project.

A structured process that is well facilitated will ensure that your level-setting sessions are successful. The format of this session should be designed to encourage open dialogue and active participation from all participants. Depending on the resources and time availability of participants (community members and staff from partnering organizations), the session can be a single comprehensive meeting, a series of shorter meetings, or even a blend of in-person and virtual sessions to accommodate everyone's schedules and locations. In addition to an agenda with objectives and evaluation, key elements for the session to be participatory include:

- **Interactive methods** such as round-table discussions, brainstorming sessions, art, role-playing, problem-solving exercises, or small group breakouts to support all viewpoints being heard, collective thinking, and collaborative decision-making.

- **Activities specifically designed to foster partnership between participants, as well as build rapport and trust**, such as icebreakers, storytelling and team-building exercises. Such activities are vital in creating a comfortable and open environment, and encouraging participants to connect and understand each other's perspectives.

The four primary outcomes of a level-setting process are essential for establishing a solid foundation for any project or initiative from the very beginning.

Table 8. Outcomes for Level Setting Process

Outcomes	Description
Alignment of Vision and Goals	Ensuring that all participants understand and agree on the overarching vision and specific goals of the project.
Shared Language	Developing a common vocabulary and understanding of terms among a group, facilitating effective communication when navigating complex or sensitive topics.
Values	Establishing a set of principles that will guide the project, ensuring that all actions, decisions, and interactions are grounded in a collectively agreed ethical and cultural framework.
Expectations	Defining the specific roles and responsibilities of each individual and organization in the project. This clarity helps in efficient collaboration, reduces overlap, and ensures accountability and effective task distribution.

IN PRACTICE

Prosperity Broward Economic Mobility Pilot
Level Setting

Level setting sessions were split up into three population-based sessions: a) Community Residents (matriarchs, patriarchs, community leaders, city representative(s)); b) System Partners (Employers, schools, workforce development providers, service providers, and policy makers) and c) the Prosperity Broward Team. Each group met three times to accomplish the following objectives:

1. To build connections and relationships supporting the short- and long-term goals of the initiative
2. To establish guiding values and expectations for engaging residents and system partners in the initiative
3. To explore individual, organizational, and community assets that can be leveraged as part of the initiative
4. To identify opportunities for residents and system partners to participate in the next phases of the initiative

Prosperity Broward Team reflected on the current status of the project and their role as convener. The group established guiding values for their work with residents and system partners and decided on their goals for community engagement. The values were reviewed and edited by the mothers and system partners.

Mothers: Many of the mothers had entrepreneurial career aspirations, such as starting a real estate or content creation business. The challenges that mothers shared were related to balancing the duties of being the only parent and wanting to participate in education and training programs, as well as having a job that is not flexible with working hours or time off. One participant said, *"When life hits you, as a mom in a world that doesn't care, you still have to mother."* Participants also discussed the challenges with accessing resources, always having to *"jump hoops"* to get what they need.

System Partners expressed motivation to collaborate on strategies to advance economic mobility but also acknowledged institutional and systemic barriers, such as high staff turnover, lack of communication across agencies, and duplicated processes (e.g. intake). Priority was given to collaborate on implementing a communication and marketing plan for services in Broward County that will include public-facing materials, cross-staff training and regular meetings with partners. To improve access and the referral system, partners emphasized the need for a centralized system that allows service providers to share information and shorten intake / referral processes for clients.

At the end of the sessions, all three groups identified next steps for ongoing community and partner engagement.

3.3. Maintain Continuous Engagement

The level-setting process fosters motivation among the community and partners. It's crucial to capitalize on this momentum by further developing and sustaining engagement and collaborative efforts.

Community and partners should be involved in defining how they want to maintain continuous engagement, thereby ensuring that the strategies implemented resonate with their interests, availability and capabilities. This strategic participatory approach in deciding the modes and frequency of interaction, feedback mechanisms, and participatory activities leads to a more invested and committed

group. Community and partners will have a deeper sense of ownership and alignment with the project's goals.

There are several effective methods for maintaining continuous engagement, such as community forums, feedback sessions, interactive workshops, and the use of digital communication platforms to keep all parties informed and involved. Additionally, there are other strategies that position community members more as decision-makers rather than only participants. These strategies include: hiring community members as paid consultants and establishing community action boards or advisory committees.

Establish a Community Action or Advisory Board

Community Action Boards (Action CABs) and Community Advisory Boards (Advisory CABs) are two distinct forms of community-based groups that engage in guiding and influencing projects or initiatives, primarily differing in their level of authority and the nature of their involvement. Action CABs often have more direct decision-making power and play an active role in the management and execution of projects, while Advisory CABs typically provide guidance, insights, and recommendations to inform the decisions made by others, serving a more consultative function.

Table 9. Differences between a Community Action Board and a Community Advisory Board

	Community Action Board	Community Advisory Board
Authority and Decision-Making Power	Typically have a more active and direct role in decision-making. They may have the power to make binding decisions or significantly influence the direction of a project or program.	Primarily provide advice and recommendations. They may not have direct decision-making power but are consulted for their input and insights.
Function and Purpose	Involved in hands-on management and oversight of community projects, including responsible for setting priorities, allocating resources, or overseeing the implementation of initiatives.	Serves as a bridge between the community and organizations or governing bodies with a main role to offer guidance, feedback, and community perspectives to inform decisions made by others.
Level of Engagement	More intensive, with members being deeply involved in the operational	More consultative, with members meeting periodically to review plans,

	aspects of projects or programs.	discuss community needs, and provide advice.
Impact	Often more direct and immediate, given their decision-making capabilities and active management roles.	More indirect, influencing decisions through their recommendations and advice.

When establishing an Action CAB or Advisory CAB, it is important to co-create with CAB members a document that details how the CAB will operate. This document, often referred to as the "CAB Charter" or "CAB Agreement," serves as a guiding framework that outlines the purpose, roles, responsibilities, decision-making processes, meeting schedules, and expectations for both the organization and CAB members. It not only fosters transparency and mutual understanding but also ensures that the CAB functions smoothly and effectively in its collaborative efforts.

| IN PRACTICE |
|---|
| *Prosperity Broward Economic Mobility Pilot*
Community Action Board |

Prosperity Broward established a **community action board (CAB).** The CAB was a decision-making body that engaged and responded to the Lauderdale Lake community's concerns about economic mobility. The CAB was comprised of 15 members from three main sectors: (1) residents, (2) private industry, and (3) public sector / service providers, with collective knowledge of employment opportunities, workforce development, education, community issues, and other topics.

The CAB was responsible for designing and implementing a community engagement model that would provide the foundation for a detailed community action plan. The CAB also reviewed and approved all actions related to the Lauderdale Lakes pilot, except for requests for funding. Six meetings were designed and facilitated.

- Meeting #1: CAB Manual
- Meeting #2: Community Engagement Plan
- Meeting #3: Community Engagement Plan
- Meeting #4: Implementation of Community Engagement Plan
- Meeting #5: Review Data and Develop Recommendations
- Meeting #6: Prioritize Recommendations and Community Action Plans

STEP 4:

Deepen Understanding through Community Engagement Planning
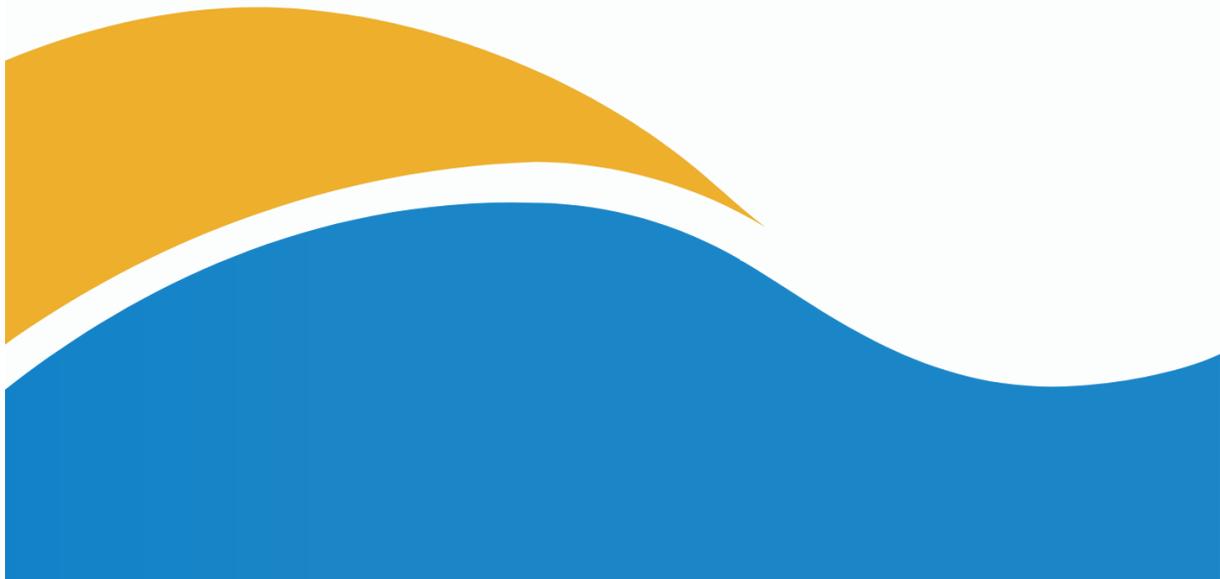
STEP 4: Deepen Understanding with Community Engagement Planning

> **In this section:**
> - What is a Community Engagement Plan?
> - Develop a Community Engagement Plan
> - Engage in Data Collection

With your Community Action Board (CAB) now established, you're set to start crafting a comprehensive community engagement plan. This plan is pivotal in shaping how you'll collaborate with the community and gather essential data on key issues. Entrusting the CAB with the leadership of this plan is a strategic move. It not only ensures that the plan genuinely mirrors the community's perspectives and needs but also empowers the CAB. Additionally, the process of developing this plan presents a valuable opportunity for CAB members to build and strengthen their connections. Such relationships are the bedrock of a robust support system, crucial for advancing the project's objectives.

4.1. What is a Community Engagement Plan?

Community engagement is both the process of how it is carried out and the desired outcomes it aims to achieve. Being intentional and thoughtful about the process is crucial for realizing meaningful and positive impacts on the community. Conducting a successful community engagement process requires a step-by-step plan.

> A **community engagement plan** is a step-by-step process for inviting the community (broadly defined) to participate in a new or reoccurring project. A community engagement plan emphasizes how community can be involved in all stages of the project, from planning to implementation to evaluation to dissemination.

A community engagement plan is a strategic approach that is used to:

- Identify needs and priorities
- Inform the decision-making or service delivery
- Develop new or collaborative ways of addressing a problem
- Develop a consensus on a proposal

- Create recommendations in addressing a problem

In general, your community engagement plan is answering four key questions:

- **What information** do we want to know? What information is missing?
- **Who** are we going to get the information from?
- **What methods** are we going to use to collect the information?
- **How will we implement** the plan? - e.g. responsible person(s), resources needed, timeline, etc.

This information can be captured by including certain components in your community engagement plan, which shape the entire process. These components are not one-size-fits-all; rather, they are adaptable and dynamic, designed to respond to the unique needs and context of each project.

Table 10. Common Components of a Community Engagement Plan

Community Engagement Plan Components	Description
Purpose	Defines the overarching goals and objectives of the engagement effort. It clarifies why the organization is seeking community input and what outcomes it hopes to achieve through the process.
Audience	The diverse groups, individuals, or organizations that will be engaged in the process, ensuring inclusivity and relevance.
Messaging	Clear and transparent communication that conveys the purpose, expectations, and benefits of community engagement to both the organization and the community members. It sets the tone for the interactions and helps manage expectations.
Considerations	Various factors and elements that influence the design and execution of the engagement strategy.
Outreach Strategies	Methods and channels the organization plans to use to reach and involve the community. This can include community meetings, surveys, social media, or other forms of communication.
Data Collection Methods	How data will be gathered from the community, whether through surveys, interviews, focus groups, or other data collection methods. It ensures that the process aligns with the engagement goals.
Data Analysis/Findings	How the information will be analyzed and synthesized to identify key findings and insights. It sets the stage for evidence-based decision-making.
Report Back to the Community	How the results of the engagement plan will be shared with the community, acknowledging their

	contributions and explaining how their input influenced decisions or actions.

4.2. Develop a Community Engagement Plan

There are various options for supporting a CAB in developing a community engagement plan. Figure 8 shows the three-session structure that Prosperity Broward used to develop a community engagement plan—including a data collection plan—in its Economic Mobility Pilot Project with the City of Lauderdale Lakes.

Depending on resources and time availability of CAB members, the session can be a single comprehensive meeting, a series of shorter meetings, or even a blend of in-person and virtual sessions to accommodate everyone's schedules and locations.

Figure 8. Meeting Structure to Facilitate CAB Expertise in Developing a Community Engagement (CE) Plan

Session	Content	Community Engagement Plan Components
Session 1: Introduce and outline the community engagement plan	1. Define a community engagement plan and share examples. 2. Identify potential benefits of a community engagement plan, as well as potential concerns. 3. Hold a small or large group discussion: • What do we need to consider for our community engagement plan? • What does success look like? • What are our goals for inviting the community into our project? *After the meeting:* The Consultant drafted the Purpose and Considerations statements for the community engagement plan.	• Purpose • Considerations • Existing Information
Session 2: Identify data needs	1. Review and discuss draft community engagement plan, including Purpose and Considerations statements.	• Audiences • Outreach Strategies • Data Collection Methods

	2. Share data regarding what is known about the issue
	3. Review available data
	4. Hold a small or large group discussion:
	   • What information will deepen our understanding of what we currently know?
	   • What specific data or indicators related to economic mobility among residents in Lauderdale Lakes do you feel are important but may be missing? Why is this information important?
	   • What perspectives might be underrepresented or absent in our understanding of economic mobility in Lauderdale Lakes?
	   • Why are these perspectives important?
	
	After the meeting: The Consultant facilitated a session with the Data Working Group. Attendees clustered the data / indicators identified by the CAB into categories, defined the intended audiences and selected data collection methods.
		• Data Analysis/Findings

Session 3: Design implementation timeline	1. Review and discuss draft community engagement plan, including recommendations for data collection methods.
	2. Prioritize information categories for the community engagement plan.
	3. Divide into small groups to outline an implementation plan for data collection, with each group outlining one information category.
	   • Data Collection method
	   • Tasks
	   • Resources needed
	4. Have small groups map the tasks of their information categories along a timeline.
		• Implementation Plan

	5. As a large group, discuss how to make the implementation plan realistic and doable.	

IN PRACTICE

Prosperity Broward Economic Mobility Pilot
Community Engagement Plan

In the Summer of 2023, members of the CAB convened three in-person meetings to develop a community engagement (CE) plan.

- During Meeting 1, CAB members discussed and determined the guiding framework for the CE plan: (i) Purpose, (ii) Considerations, and (iii) Existing Information.
- During Meeting 2, CAB members brainstormed the types of data and perspectives they felt should be collected about economic mobility among Lauderdale Lakes residents, with an emphasis on data that was not yet available or represented.
- During Meeting 3, CAB members prioritized data collection and developed an five-week implementation timeline for data collection.
  - o (i) individual experiences, such as understanding the experiences of fathers, single parents, and children in navigating systems and services,
  - o (ii) dissemination of information, such as exploring why opportunities for economic mobility are not being communicated to or reaching communities, and
  - o (iii) employers, such as understanding why employers are not in certain zip codes, what barriers exist for hiring minors, and how employers can support networking, connections, and paid internships among residents of Lauderdale Lakes.

These meetings helped guide the development of a CE plan that prepared Prosperity Broward, the CAB, and other partners to begin collecting data in the community.

4.3. Engage in Data Collection

Once data collection priorities have been identified in the community engagement plan, it is important to ensure that data collectors have everything they need to feel confident and be successful in collecting data. Consider providing:

- Tip sheets or formal trainings on how to design data collection instruments (such as surveys, focus groups, interviews, and observations), engage with participants in the data process (such as interviewees), and analyze data.

- Regular one-on-one or group check-ins with data collectors to discuss findings, share and troubleshoot challenges, and celebrate successes with data collection

IN PRACTICE
Prosperity Broward Economic Mobility Pilot Data Collection
During the Lauderdale Lakes economic mobility pilot, implementation of the community engagement plan included interviews with 6 service providers, surveys with 6 service providers and 33 residents of Lauderdale Lakes, 12 responses represented by 11 employers in Broward County completed a 14-item survey, and review of case management data for 25 local mothers.

STEP 5:

Community Action Planning
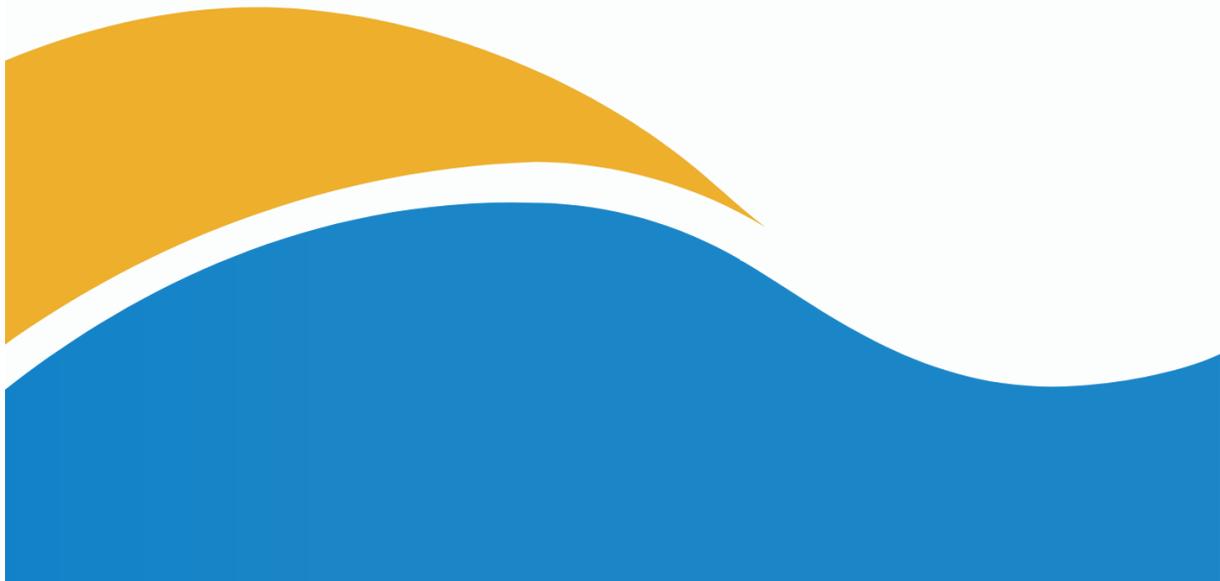
STEP 5: Community Action Planning

In this section:
- What is a Community Action Plan?
- Participatory Data Analysis Process
- Develop a Community Action Plan

After you implement a community engagement plan and collect data, the next crucial step is to utilize the gathered information effectively to shape the goals of a Community Action Plan.

5.1. What is a Community Action Plan?

A Community Action Plan responds to the needs and gaps identified from data collection. It is a roadmap for community members, local government, nonprofit organizations, businesses, and other interested in addressing the issue.

A **Community Action Plan** is a written document that outlines the specific goals, objectives, and actions a community, coalition or group intends to take to address a particular issue or challenge within that community.

Table 11. Common Components of a Community Action Plan

Components of a Community Action Plan	Description
Recommendation	A statement that defines the strategic action and provides details on the desired outcome
Value Added Statement	Concise and clear statement that articulates the specific benefits or positive contributions that a recommendation brings to a situation, organization, or community.
SMARTIE Goal	Specific and measurable outcome to achieve within a defined timeframe that is inclusive and equitable
Community Engagement	Strategy to meaningfully engage communities most impacted and partners in the planning, decision-making, and implementation process

Success Indicators	Measurement or achievable number / percentage that represents the success of completing the goal
Actions	Specific tasks need to be taken to achieve the goals outlined in the community action plan
Start	Commencement date or the beginning point of the action item
End	Conclusion date or the endpoint of the action item.
Partners	Individuals, organizations, or entities needed to implement the specific action.
Additional Resources Needed	List any extra resources, beyond what is currently available, that are required for the successful execution of the proposed actions. Resources can include consultants, materials or other support necessary for implementation.

5.2. Participatory Data Analysis Process

Once the data is collected, it needs to be carefully reviewed and cleaned. This involves fixing or removing incorrect, corrupted, incorrectly formatted, duplicate, or incomplete data within a dataset.

Participatory data analysis is the process of bringing individuals and organizations together to interpret and make sense of the data by providing context from diverse perspectives.

With cleaned data in hand, the next step is to conduct a group-level analysis, called a participatory data analysis. This analysis involves reviewing the data collectively with the community and partners (e.g. CAB) to identify major themes, patterns, and trends that emerge from the data. This collaborative analysis process ensures that diverse perspectives are considered in interpreting the findings. Once the major themes have been identified, they are translated into actionable goals for the Community Action Plan.

Establish a schedule for the participatory data analysis sessions, considering the availability of participants (e.g. CAB).

Figure 9. Common Steps to Conduct a Participatory Data Analysis

Step 1	Prepare the data	Depending on time availability and density of data, format raw data or create easy to understand visual

		representations of the data, such as charts, graphs, or diagrams, to help illustrate descriptive statistics.
Step 2	Share the data	Provide all participants with access to the collected data. Give an overview of the data collected and handouts, then allow time for participants to review the data independently and become familiar with the content.
Step 3	Facilitate group discussions	Pose critical questions to support small or large group discussions where participants can share their observations, insights, and initial interpretations of the data.
Step 4	Code the data	Collaboratively identify key themes, patterns, or codes that emerge from the data.
Step 5	Create categories	Group related codes or themes into broader categories to help organize the data and simplify the analysis process. Name each category.
Step 6	Interpret findings	Engage in discussions to interpret the meaning and significance of the identified themes and categories. This includes exploring relationships between different themes and consider how they connect and intersect.

5.3. Develop a Community Action Plan

Depending on resources and time availability of CAB members, the session can be a single comprehensive meeting, a series of shorter meetings, or even a blend of in-person and virtual sessions to accommodate everyone's schedules and locations.

To start the process, each goal for the Community Action Plan should related to one of the identified categories. Once the goals are established and prioritized, the next step is to develop detailed action plans for each goal. In some cases, there may be multiple goals identified. Prioritization is important to determine which goals should be implemented first based on factors such as urgency, feasibility, and potential impact. This involves additional discussions and input from the CAB.

There are various options for supporting a CAB in developing a community action plan. Figure 10 shows the two-meeting structure that Prosperity Broward used to develop a Community Action Plan as part of its Economic Mobility Pilot Project with the City of Lauderdale Lakes.

Figure 10. Meeting Structure to Facilitate CAB Expertise in Developing a Community Action Plan

Session	Content	Outcomes

Session 1: Participatory Data Analysis	1. Hold a small group discussion to:
	  • Review data from the community engagement plan
	  • Identify key findings from the data collected and document on a flip chart
	2. Facilitate in a "gallery walk" in which small groups move around to read what other groups wrote about key findings
	3. Hold a large group reflection on:
	  • Emerging patterns or contrasts within the data
	  • Points of intervention to support economic mobility, based on the data
	4. Hold a large group discussion to define what are the elements of a well-crafted recommendation
	5. Individually brainstorm recommendations
	6. Hold a large group discussion to cluster recommendations that are similar
		• Recommendations

Session 2: Develop Community Action Plan	1. Hold a large group discussion to review recommendation clusters from the previous meetings to identify if any changes need to be made 2. Individually prioritize three recommendations with the most impact and three easiest to accomplish 3. Hold a large group discussion to priorities and decide on three top recommendations based on a combination of impact, ease, and interest 4. Hold small group discussions to develop 1-year action plan, with each group working on one prioritized recommendation	• Community Action Plan

5. Facilitate in a "gallery walk" for small groups to review each other's action plans and provide feedback 6. Original groups revise their action plan based on feedback 7. Facilitate a large group reflection on the drafted Community Action Plans, including strengths, weaknesses, concerns, and next steps	

IN PRACTICE

Prosperity Broward Economic Mobility Pilot
Community Action Plan for Three Prioritized Recommendations

The Consultant facilitated the development of the community action plans. The workshop question was, "Given the information collected from residents, employers, and service providers through the CE plan, what changes are needed within organizations and at the policy and system level to make it easier for Lauderdale Lakes residents to achieve economic mobility?" CAB identified more than 35 recommendations for advancing economic mobility. During the community action planning process, they clustered recommendations into eight categories: (1) education and training, (2) marketing, (3) childcare, transportation, and other employer benefits, (4) convening and collaboration, (5) shared service processes and staff, (6) universal human resources guidelines, (7) gap funding, and (8) system accountability measures. From this organized set of recommendations, they prioritized three strategies, based on considerations of each strategy's impact and ease of implementation. Three community action plans were developed that included goals, objectives, and actions.

Transitioning to Implementation

Once your Community Action Plan is developed, you are ready to implement. While this "how to" guide does not detail implementation best practices, below are a few key implementation considerations:

Consider how to disseminate the action plan and increase awareness. Consider how to disseminate the action plan and increase awareness. Increasing awareness through a targeted communication strategy helps ensure that the action plan's goals and methods are clearly understood and embraced. This strategy should include identifying key audiences, leveraging various channels like social media, community forums, and direct communications. Additionally, ensure the action plan is available in diverse media formats (text, audio, video) for accessibility and to cater to different preferences. Encourage community members and partners to actively participate in dissemination, perhaps through sharing testimonials or distributing information within their networks.

- How can you format and frame the plan in a way that is accessible, understandable, culturally and linguistically appropriate, and interesting to diverse audiences?
- How are community and partners who are part of the project (e.g. on the Community Action Plan) engaged in the dissemination efforts?
- Which channels can you use to disseminate the plan to the community being impacted?

Consider how you can maintain engagement with the community and partners. Assess the current structure for community and partner engagement, and discuss if it works for the implementation phase. The community that will be impacted by the action plan should be actively involved in the implementation process. In addition, communicate regularly with all partners who have contributed throughout the process. This includes regular updates and feedback sessions.

- How can you build new relationships and strengthen existing relationships?
- How can you regularly practice communication and transparency with the community?
- How can you be responsive to community feedback?

Consider what is needed to prepare to implement the action plans (may require an environmental scan or other method of assessment). Take time to determine what is needed to fully implement the action plans. Begin by identifying the resources required for full implementation, not just in terms of funding, but also the necessary tools, technology, and personnel. Assess whether

your team and community members possess the requisite skills and knowledge to effectively carry out the plan. If gaps are identified, develop targeted training and capacity-building programs to equip them with an in-depth understanding of the plan's objectives and methodologies. Additionally, consider the logistical aspects such as timelines, workflow, and collaboration mechanisms.

- Are there gaps in our current resources, and how can we address them?
- Do our team and community members currently possess the skills and knowledge required to effectively execute the plan?
- Have we established a clear and realistic timeline?

Consider how to sustain momentum despite changes in the environment.^{Error! Bookmark not defined.} Develop a flexible and adaptive approach. This involves continuously monitoring external factors, being ready to adjust strategies as needed, and maintaining clear, open communication with all individuals and organizations involved. Encourage resilience and foster a culture of innovation to quickly respond to changes. Prioritize maintaining engagement and motivation among the convening organization, community and partners to keep the focus on long-term goals despite short-term fluctuations.

- How can your plan be resilient to changes in the political context?**Error! Bookmark not defined.**
- How can you ensure sufficient funding and other resources are available to fully implement the plan?
- How can you transition work to the community to avoid disruptions if/when your organization exits?

Additional Resources

Additional Resources to Support Organizational Commitment
- [Get the Boss to Buy In](#) (Harvard Business Review)
- [Sell It Up the Ladder: Top Presentation Tips for Leadership Buy-In](#) (Forbes)

Additional Resources to Support Cultural Competence and Humility
- [Developing, Understanding, and Strengthening Cultural Humility](#) (Community-Based Global Learning Collaborative)
- [Developing Culturally Responsive Approaches to Serving Diverse Populations: A Resource Guide for Community-Based Organizations](#) (National Research Center on Hispanic Children and Families)

Additional Resources to Support Identification of Partners
- [Creating and Maintaining Coalitions and Partnerships](#) (Community Tool Box, University of Kansas)
    - See #10A, which focuses on how your organization will ensure the 6 R's (recognition, respect, role, relationships, reward, results) for maintaining participant engagement
- [Boosting Upward Mobility: A Planning Guide for Location Action](#) (Urban Institute)
    - See pages 50-68 for guidance on identifying and recruiting partners

Additional Resources to Support Community Action Plan Development
- Template for Community Action Plan ([Appendix 4](#))
- [Boosting Upward Mobility: A Planning Guide for Location Action](#) (Urban Institute)
    - See pages 114-154

Additional Resources to Support CAB Development
- The Lauderdale Lake [Template for Community Engagement Plan](#) (Appendix 3)
- [Boosting Upward Mobility: A Planning Guide for Location Action](#) (Urban Institute)
    - See pages 69-114 on data collection related to local mobility conditions

Additional Resources to Support Reflection on Community Power in the Community Engagement Process
- [Using Fair Process to Make Better Decisions](#) (Management Center)

- [IAP2 Spectrum of Public Participation](#) (International Association for Public Participation, IAP2)

Additional Resources to Support Your Understanding of Equity Principles
- [Social Identities and Systems of Oppression](#) (Smithsonian National Museum of African American History and Culture)
- [Social determinants of health](#) (Healthy People 2030, US Department of Health and Human Services)
- [Talking About Race: Being Antiracist](#) (Smithsonian National Museum of African American History and Culture)
- [10 Keys to Everyday Anti-racism](#) (Greater Good Science Center, UC Berkeley)

Additional Resources to Support Evaluation
- [Results Based Accountability](#) (Clear Impact)
- [Evaluation Tools and Resources](#) (Better Evaluation)
- [The Equitable Evaluation Framework](#) (Equitable Evaluation Initiative)

Additional Resources to Support Your Understanding of Power Dynamics
- [Three Frameworks for Shifting Power for Greater Equity and Impact](#) (Lori Bartczak, Community Wealth Partners)
- [Building Community Power for Health, Justice, and Racial Equity](#) (The Praxis Project)

Additional Resources to Support Embedding of Equity into Organizational Culture
- [Assessing How Committed an Organization is to Diversity, Equity, and Inclusion](#) (University of Michigan)
- [Working Principles for Health Justice and Racial Equity: Organizational Self-Assessment Tool](#) (The Praxis Project)
- [Racial Equity Readiness Assessment for Workforce Development](#) (RaceForward)
- [How Can Organizations Improve Workplace Equity?](#) (Society for Human Resource Management)

Additional Resources to Support Partnership Capacity
- [Readiness Checklist: How Ready are we to Initiate the Partnership?](#) (SEED and MIT D-Lab)
- [Creating and Maintaining Coalitions and Partnerships](#) (Community Tool Box, University of Kansas)

Additional Resources on Filling Staffing Capacity Gaps

- [Boosting Upward Mobility: A Planning Guide for Location Action](#) (Urban Institute)
  - See pages 50-68 for guidance on identifying partners
- [Choosing a Consultant](#). (Community Tool Box, University of Kansas)

Additional Resources to Support Budgetary Capacity
- [Community Engagement Principles & Recommendations](#) (Elevated Chicago)
  - See "Best Practices in Budgeting for Community Engagement" (page 4)
- [Budget Template for Community Engagement](#) (US Department of Housing and Urban Development)

Additional Resources to Support Data Collection
- [What is Community-Based Participatory Research?](#) (Detroit Urban Research Center)
- [6 Methods of Data Collection](#) (With Types and Examples (Indeed)