Resident Engagement Guidebook

Exploring Readiness and Options

THE ASPEN INSTITUTE
Community Strategies Group

LEADS
Community Foundations Leading Change

October 2014

About the Aspen Institute Community Strategies Group

The Aspen Institute Community Strategies Group (CSG) designs, leads and delivers work focused on strengthening community philanthropy, regional vitality, and family economic success across the United States. Within these focus areas, CSG designs and manages action-inducing peer-learning among organizations, leaders and policymakers. It convenes thinkers and doers to swap strategies and find common ground. It manages initiatives that catalyze innovation and progress. It builds networks to spread good ideas and useful lessons. And, it produces tools, analysis, and stories that help communities make better decisions. Overall, CSG strives to help leaders at the community level – and the stakeholders who support them – sharpen their focus and strategy in the midst of action.

Aspen CSG served as lead facilitator of the CFLeads 2013-2014 Resident Engagement Community Leadership Network (CLN), after serving as the primary facilitator in three prior CLNs. In addition, CSG partnered with CFLeads for its 2007-2008 National Task Force on Community Leadership and in developing the *Framework for Community Leadership by a Community Foundation.*

About CFLeads

CFLeads is the hub and go-to resource for community foundations seeking to make more impact in their communities through community leadership. As a national network, CFLeads supports and connects hundreds of community foundations across the country as they take on new roles, push their practices, and learn from the experiences of their peers.

Mission

CFLeads helps community foundations advance their community leadership practice to build thriving communities.

Vision

Community foundations take on challenging issues, engage residents, pursue cross-sector solutions to community problems, and marshal the needed resources to improve their communities and provide opportunity for all.

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Acknowledgements

This *Guidebook* emerged from the learning journeys of the following eight community foundations that participated in the 2013 – 14 CFLeads Resident Engagement Community Leadership Network (CLN):

Amarillo Area Foundation
Baltimore Community Foundation
The Community Foundation Serving Boulder County
Community Foundation for Greater Buffalo
The Denver Foundation
Foundation for the Mid South
Fremont Area Community Foundation
Humboldt Area Foundation

We are especially grateful to the CLN team members below who provided significant input and direction on many of the elements of the *Guidebook* – including the Resident Engagement Spectrum – in an effort to define what resident engagement is, and is not, for the community foundation field:

Chris Barge, *The Community Foundation Serving Boulder County*

Virginia Bayless, *The Denver Foundation*

Ellen Bernard, *Baltimore Community Foundation*

Clotilde Perez-Bode Dedecker, *Community Foundation for Greater Buffalo*

Angela Lust, *Amarillo Area Foundation*

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Introduction

Community foundations are unique institutions in the civic landscape; they are local, independent, permanent, and generally have broad community betterment missions. As such, they have a unique ability to further the public good. As community foundations have become more involved with their communities, expanding their role beyond grantmaking, resident engagement has emerged as a practice that is helping them make more sustained impact. Urged in 2005 by Monitor Institute's *On the Brink of New Promise: The Future of U.S. Community Foundations* to "shift priorities from a focus on the institution to the community" and in 2013 by the CFLeads Cultivating Community Engagement Panel's *Beyond the Brink: Engaging Residents. A New Call to Action for Community Foundations,* to directly engage residents as partners in change so that "all residents have a chance to participate in important decisions and take action to improve their communities," some community foundations have committed to work more closely with residents, particularly those residents that are most vulnerable and most affected by the programs and policies many foundations seek to influence.

This *Guidebook* helps community foundations and other community partners understand what it takes to deepen their resident engagement practice. It builds on the *Framework for Community Leadership by a Community Foundation,* which was created by CFLeads, the Council on Foundations' Community Foundations Leadership Team, and the Aspen Institute Community Strategies Group, and outlines the key building blocks community foundations need to have in place to be effective community leaders.

The *Guidebook* is part of a suite of products created by CFLeads to help community foundations better understand the concept, practice and impact of resident engagement. They are the result of two years of study and exploration, beginning with the 34-member Cultivating Community Engagement Panel, which concluded that resident engagement is largely missing from community foundation practices and urged foundations to do more. The Panel's work was followed by a Resident Engagement Community Leadership Network (CLN), which brought together eight community foundation teams over the course of a year to deepen their resident engagement practices. In addition to this *Guidebook, Powerful Partners: Lessons from Community Foundations about Resident Engagement* reports on the findings of the CLN, and *Community Foundations and Resident Engagement: Stories from the Field* illustrates the work through real-life examples.

The specific objective of this *Guidebook* is to help community foundations determine their readiness to engage residents more deeply.

With this *Guidebook,* users can:

1. Understand what resident engagement is, why it is important, and explore what it looks like in action.

2. Learn what critical skills and capacities are needed to more deeply engage residents from any starting point.

3. Determine specific steps that must be taken in order to engage residents more deeply in addressing issues that affect them.

This *Guidebook* was created as an early tool for community foundations interested in more deeply engaging residents. As the field learns more and more community foundations adopt this community leadership practice, we anticipate this *Guidebook* may change and that other tools will emerge. Users of this *Guidebook* are encouraged to provide feedback, suggestions and other tools to CFLeads at info@cfleads.org.

Why a *Guidebook*?

As community foundations have adopted new tools and approaches to strengthening their communities, resident engagement has emerged as a key practice. This *Guidebook* is designed to assist community foundations as they explore the range of efforts and activities that encompass resident engagement. It also describes why such efforts are critical to community change and deeper, long-lasting community impact.

The activities found in this *Guidebook* can assist community foundations in structuring productive dialogue around what it means to engage residents and help gauge the foundation's willingness and capacity to do more. From there, the community foundation can take its next best step to engage residents more deeply in addressing local challenges. This *Guidebook* is designed to move community foundations from *understanding* resident engagement to actually taking *action* in their community.

What this *Guidebook* is not designed to do is facilitate dialogue around some of the more complex issues that come with resident engagement, such as race, class, power and control. However, given that one objective of resident engagement is to connect with individuals or groups who have been historically marginalized or are currently disconnected from civic life, it is likely that these issues will come up. Because many resources already exist, we did not want to duplicate efforts. We instead strongly encourage you to look to those resources when (or even before) those issues come up. To help, we have included sources for additional information in "Readings and Resources" on page 9.

Who should use the *Guidebook*?

The *Guidebook* is designed for community foundations interested in engaging residents more deeply in addressing pressing community challenges. The *Guidebook* is geared primarily toward community foundation staff and board members, however the resources and tools found in this *Guidebook* are not exclusive to this audience. Private foundations, community-based organizations and local government may also find this *Guidebook* useful and are encouraged to apply it in their own work.

Community foundations that have embraced the community leadership practice of resident engagement have seen substantial and sustained impact.

How the *Guidebook* is Organized

The *Guidebook* is divided into three parts, each with activities and tools to help staff and board members better understand what resident engagement means and how to take that understanding and move it toward action.

Part 1: *Readings and Resources* introduces the concept of resident engagement through a series of short readings, reports and resources. A structured activity uses those readings to introduce the concept of resident engagement to foundation staff and board members and initiate a deeper conversation about what it can mean in a community foundation context.

Part 2: *The Resident Engagement Spectrum* offers a way to think about the multiple levels at which a community foundation and/or its partners can consult and engage residents in addressing local issues. The activities in Part 2 are designed to help staff and board members begin to develop a shared understanding of what resident engagement means within the context of their own foundation and to foster focused, intentional dialogue about potential risks and benefits that come with engaging residents more deeply in addressing local challenges.

Part 3: *From Understanding to Action* is a set of tools designed to take what staff and board members have learned about resident engagement in a community foundation context and move them toward action. Activities in Part 3 include:

- ***A Status Assessment Tool,*** which uses the *Framework for Community Leadership by a Community Foundation* to help determine the foundation's resident engagement strengths at a particular point in time.
- ***Designing for Impact Tool,*** which can help the foundation clearly articulate an issue or area of work where it wants to engage residents more deeply and describe what the engagement process will look like.
- ***Action Planner Templates,*** which can help the foundation define the specific steps it must take to engage residents more deeply in addressing community issues or strengthen specific resident engagement building blocks.
- ***Resident Engagement Check-Up,*** which can help the foundation evaluate its resident engagement efforts and consider how to strengthen its approach in the future.

How to Use the *Guidebook*

The *Resident Engagement Guidebook* is designed to be a structured exploration that a community foundation can undertake with staff and board members. Almost all of the tools can be pulled out and used individually, but for the best results, we encourage you to design a thorough exploration process.

Designing Your Resident Engagement Exploration:

1. Lay the foundation for the exploration process.
First, design the process in which you will explore resident engagement. Determine:

- ***Who will lead?*** Determine two or three people within the foundation who will take leadership in making this examination and exploration happen. In order to develop shared ownership of the process, these individuals should ideally come from different areas or departments of the foundation. If needed or desired, secure outside facilitation assistance to make sure the process is inclusive, targeted and engaging.
- ***Who will participate?*** Work with a specific group to deepen your understanding of and plans for resident engagement. For example, you might start with a committee of the board, with a special ad hoc board and staff group, or with the entire staff or board at a retreat. During the exploration process, you might break into sub-groups (e.g., by program, administrative, and finance staff) so that staff have an opportunity to explore resident engagement in the context of their particular job responsibilities.

- ***When?*** It's best to set a particular time period during which you will both conduct this exploration of resident engagement and make a determination about your next steps. Depending on the context and what you connect it to (see next point), that time period might be a few weeks to a year.

- ***Connected to what other action?*** This examination will have more impact if it is connected to making some decisions about or producing some results for the foundation – for example, as a preface to annual goal-setting, a board direction-setting retreat, significant strategic planning process, or as a new strategy to advance current community leadership work.

2. Use the activities and resources throughout the *Guidebook* to structure your exploration.
Each section of the *Guidebook* includes resources and activities to help structure conversations and guide your foundation along its resident engagement path. Use the activities as they are, or take them and make them your own.

You may want to tailor discussion questions to better meet your needs based on your community foundation's starting point and your reason for having the discussion. Ideas for discussion questions are included with activities.

3. Gather and have at it!
Assemble your group or team according to your plan to explore resident engagement. This might be a one-time event or a series of sessions. Whichever it is, make sure you have enough time to have a rich exchange of ideas, reflections and implications for foundation action.

• PART 1 •

What is Resident Engagement and Why is it Important?

The term "resident engagement" can mean different things to different people:

- "Resident engagement means that residents feel that they have a voice… that they're part of the decision-making for what their community should look like."
- "Working with the community… with people who live in the community, in their space, where they are, around the issues that they care about. Not the issues we might expect necessarily."
- "Resident engagement means creating the space – through small grants or literally physical space, food, child care – for low-income residents, and, in particular, people of color, to identify solutions they feel will most benefit them. And being patient in that development."
- "Resident engagement is when we not only are engaging with them, but they are involved in the design, implementation, and continuation of the project *post-grant period*."
- "I like the cliché, 'Do nothing about me without me.' You're more likely to develop something helpful and that people interact with if you involve the folks that you're trying to 'help.'"
- "It fundamentally comes down to a belief that a community can solve its own problems, and *only* the community can solve its own problems."

The comments above were made by community foundation staff and board members who were asked to define resident engagement in their own words. As you can see from their responses, resident engagement can be interpreted in a variety of ways. Those who are new to resident engagement may approach it cautiously—recognizing its importance but unsure of what exactly it entails—while those who have practiced it for some time may use phrases they have come to understand from experience to explain what it is and why it is important. Even within a single foundation, staff, board members and others may be at different places in their understanding of resident engagement.

Initiating a dialogue around what it means to engage residents in addressing community issues is an essential first step in deepening your resident engagement practice. Doing so can uncover hidden assumptions, produce new insights and create shared understanding among foundation staff and board members.

Part 1 provides a starting point for this dialogue. Here, we provide a definition of resident engagement and share thoughts on why it's important. Then, we offer a resource list and activity to help structure and guide your own foundation's resident engagement conversations.

Defining Resident Engagement

The CFLeads Resident Engagement Community Leadership Network and the Cultivating Community Engagement Panel spent a significant amount of time considering what resident engagement means in a community foundation context. For the purposes of this *Guidebook*, we have pieced together language and themes from those discussions to offer the following definition of resident engagement:

Resident engagement is an approach that centers on helping community members identify the changes they want to see and then supporting them in pursuing their goals. The community foundation and/or its partners ensure that community change is accomplished by working with residents, rather than doing things for them or to them.

Why is Resident Engagement Important?

The Cultivating Community Engagement Panel found that resident engagement is a critical – but often missing – piece of community leadership. So why, exactly, is resident engagement so important?

Solutions that Make Sense When Addressing Complex, Multi-Sector Challenges

While decisions made by traditional community leaders can have significant community impact, there is potential for those decisions to have an even greater impact when residents are involved. "The challenges facing our communities are too complex and too entrenched to be addressed by any one sector, or one organization," stated one Resident Engagement Community Leadership Network participant. No one sector can do it alone. *For example, a community foundation that decides to help build a new playground to encourage physical activity among children, may find that the playground goes unused. When the foundation finally asks neighborhood families why they aren't using the playground, parents explain that they don't feel comfortable letting their kids play outside unsupervised. What they really would prefer is an after-school program where kids can have supervised play.* If the foundation had engaged residents up-front in this scenario, they might have had a very different outcome – and a more worthwhile investment. When residents are involved in identifying and developing solutions to challenges that affect them, they create solutions that make sense. After all, who is more familiar with the issues affecting them than the residents themselves?

Long-Term, Sustained Community Impact

Community foundations often grapple with the tough question of how to sustain community initiatives in the long-term. They can't afford to fund projects for years on end, yet the issues being addressed may require long-term investment. When community foundations engage residents in issues that affect them, residents not only build relationships and generate solutions that make sense, but they develop the skills and capacity to take on issues on their own in the future. *For example, residents that come together to develop a farmers market may initially rely on community foundation and/or partner support, perhaps in the form of grants, staffing, business development training, or leadership development. Over time, residents build relationships, leadership skills, and a sense of ownership over the project – so much so that they find ways to support the market on their own (volunteers, vendor fees, crowdfunding, donations, special market currency, etc.) and no longer rely on the foundation.* This not only sustains the effort over time, but it may garner greater support for the community foundation from donors. Donors may be more energized and willing to step in and offer the community foundation support when they see community members investing time and effort to address an issue.

Relationships and Trust

When residents are given the opportunity to come together to identify and create solutions to common challenges – *to address bullying in their school system, for example* – new relationships are built. In working together, residents begin to realize that they have shared values and interests related to other issues and opportunities, and that they can work collectively to pursue them. And because the challenges facing communities are so complex, no one sector can do it alone. Everyone – including residents – must contribute in order for lasting results to be possible.

In addition, as the community foundation increasingly facilitates and supports resident-driven efforts, it builds relationships with residents and becomes a trusted partner in the community. Once relationships are established, they can be leveraged to address other issues in the future. *For example, while the parent coalition might initially come together to address bullying in schools, it could later go on to advocate for more vocational training opportunities.* It is these relationships based on trust and mutual respect that make community change possible. As one Resident Engagement Community Leadership Network advisor stated, "Change moves at the speed of trust."

The Role of the Community Foundation in Resident Engagement

In this *Guidebook*, we often refer to community foundations "engaging residents more deeply" or "strengthening their resident engagement practice." While these words suggest that the main role community foundations play in resident engagement is working directly with residents, we have found that community foundations actually play a number of different roles in resident engagement – often concurrently – and that they may never engage directly with residents. Instead, they may work closely with a community partner whose "on-the-ground" work is more connected to local residents or the issue at hand. In that case, the foundation may not work directly with residents but support the efforts of organizations that do.

Readings and Resources

Learn More and Be Inspired!

Before beginning the activities in this *Guidebook*, you and your team can gain a lot of inspiration from a number of sources!

1

Stories from the Field includes two articles that illustrate resident engagement in action and the incredible power of this work:

"Our Hearts Are In This"
Community Foundation for Greater Buffalo

"This Was Really An Eye-Opener"
Humboldt Area Foundation

http://www.cfleads.org

2

A report by the CFLeads Cultivating Community Engagement Panel that calls for more resident engagement by community foundations and makes recommendations for important changes in community foundation practice:

Beyond the Brink: Engaging Residents. A New Call to Action for Community Foundations
CFLeads Cultivating Community Engagement Panel.
July 2013.
http://www.cfleads.org/community-engagement/call-to-action.php

Beyond the Brink may also be helpful if you would like to engage in a discussion about how other terms will be defined during this process. Just as the term "resident engagement" can mean different things to different people, so can the term "resident." Some define residents as those with "lived experience" who add perspective to the work community foundations do with nonprofits, government, business, and other entities and sectors in the community. Others would prefer to use terms such as "resident agency" and/or "inclusiveness." For more information, see the box on page 8 ("Guiding Principles for Resident Engagement") of *Beyond the Brink*.

3

A webinar that highlights the findings of the Cultivating Community Engagement Panel and provides more examples of resident engagement practice by community foundations:

Resident Engagement: The Next Step in Community Leadership (Webinar)
CFLeads. July 2013.
http://www.cfleads.org/community-engagement/webinar-2013-07-29.php

4

Additional stories about community foundations and the steps they took to work more closely with residents:

Community Foundations and Resident Engagement: Stories from the Field.
CFLeads. October 2014.
http://www.cfleads.org

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In advance of participating in the activities found in Part 2 of this *Guidebook*, users are encouraged to read and review:

Powerful Partners: Lessons from Community Foundations about Resident Engagement
CFLeads. October 2014.
http://www.cfleads.org

In this document, resident engagement lessons are shared by eight community foundations that participated in the 2013-14 Resident Engagement Community Leadership Network hosted by CFLeads.

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Framework for Community Leadership by a Community Foundation

CFLeads, the Council on Foundations' Community Foundations Leadership Team, and the Aspen Institute Community Strategies Group
Updated July 2013.

The *Framework* serves as a foundational document on community leadership for the community foundation field by providing the building blocks of effective community leadership practice. See pages 18 and 19 of this *Guidebook* for building blocks that make up the "Practices for Success" and describe the skills and capacities needed to consult with and engage residents.
http://www.cfleads.org/community-engagement/framework.php

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Philanthropy and Resident Engagement: The Promise of Democracy

National Civic Review Special Edition. Fall 2013.

This special issue of the National Civic Review examines the vital role philanthropy can play in cultivating strong, connected communities where residents are actively engaged in shaping their community's future. Choose from more than 10 articles on resident engagement and philanthropy to deepen your resident engagement exploration.
http://www.cfleads.org/community-engagement/national-civic-review.php

8

On the Brink of New Promise: The Future of U.S. Community Foundations

Lucy Bernholz, Katherine Fulton and Gabriel Kasper. Blueprint Research & Design, Inc. and Monitor Company Group, LLP. 2005.

This report examines the changing environment for community philanthropy and its implications for community foundations. It explains the "shifting fundamentals" within the community foundation field – and how that shift points toward taking on more – and more effective – community leadership.
http://monitorinstitute.com/downloads/what-we-think/new-promise/On_the_Brink_of_New_Promise.pdf

9

Additional sources of information to facilitate dialogue around some of the more complex issues that come with resident engagement, such as race, class, power and control, as referenced on page 3:

Joint Affinity Groups (JAG)
Founded in 1993, JAG is a network of collaborating affinity groups engaging over 20,000 professionals, who are committed to equity and social justice.
http://jointaffinitygroups.org/resources/publications-research

The following JAG members also have resources available online:

Asian Americans/Pacific Islanders in Philanthropy (AAPIP)
http://aapip.org/what-we-do/publications

Association of Black Foundation Executives (ABFE)
www.abfe.orf/knowledge-center

Emerging Practitioners in Philanthropy (EPIP)
http://www.epip.org/

Funders for LGBTQ Issues
http://www.lgbtfunders.org/resources/publications.cfm

Hispanics in Philanthropy (HIP)
https://www.hiponline.org/resources/publications-and-recordings/terms/list

Native Americans in Philanthropy (NAP)
http://www.nativephilanthropy.org/articles/

Women's Funding Network (WFN)
http://www.womensfundingnetwork.org/tools-for-change/reports-resources/

Please also see the following resources:

Colorado Funders for Inclusiveness and Equity
http://www.coloradoinclusivefunders.org/resources.html

D5 Coalition
http://d5.sen-associates.com/tools/

Philanthropic Initiative for Racial Equity (PRE)
http://www.racialequity.org/resources.html

Racial Equity Resource Guide of the W.K. Kellogg Foundation
http://www.racialequityresourceguide.org/

• ACTIVITY 1A •

Reading into Resident Engagement: What it Means to Us

Purpose:

This activity is designed to introduce foundation staff and board members to resident engagement through relevant readings and generate conversation around what it means for community foundations to engage residents more deeply in addressing local issues. *This activity can be done on its own or immediately preceding Activity 2A: Introducing the Resident Engagement Spectrum.*

Objectives:

After completing this activity, participants will have a clearer understanding of what resident engagement is, why it is important and what opportunities and challenges come with it.

Materials Needed:

- Selected readings from the resource list in Part 1 (*ask participants to bring copies with them or have printed copies available*)
  - Recommended: "Our Hearts are in This," "That was Really an Eye-Opener," and *Beyond the Brink: Engaging Residents. A New Call to Action for Community Foundations*
- Discussion questions (*on-screen or printed*)
- Flip chart
- Markers
- Post-its

Preparation for Activity 1A

- Use a selection of readings from the resource list in Part 1 to help your group begin its resident engagement exploration.
- Organize a meeting where you can engage in a preliminary conversation about resident engagement. *Remember that foundation staff, board members, and others may be at different places in their understanding of resident engagement. Early on, consider conducting individualized sessions for different groups (e.g., donor services staff; program staff; board members; etc.) so that they understand how resident engagement applies in their own context. Later, bring the groups together for a broader conversation about resident engagement within the foundation.*
- Share the readings and a few discussion questions with participants in advance of the meeting.
- At the meeting, structure the conversation around a series of discussion questions. Constructing and asking good questions is critical to having a good discussion—both about resident engagement in general and about where your foundation wants to go with it.

Activity 1A: Reading into Resident Engagement

Here is a menu of questions you might consider for your discussion:

- **What surprised you** in the readings, if anything?
- **What "stuck"** from the reading – either because it resonated with you or because it seemed "off-the-mark"?
- What are the top two ways that resident engagement – as it is described in the readings – **feels *different from* or *similar to*** what our foundation is doing today?
- What do you see as potential **benefits** of engaging residents more deeply in the foundation's work?
- What **concerns** do you have about engaging residents more deeply in the foundation's work?
- What are the one or two things that most **excite** you about potentially strengthening our foundation's resident engagement practice?

Next Steps

- Continue the conversation with *Introducing the Resident Engagement Spectrum* (Activity 2A) and *Taking a Deep-Dive into Resident Engagement* (Activities 2B, 2C, and 2D).

• PART 2 •
The Resident Engagement Spectrum

The Resident Engagement Spectrum is a tool for understanding the various levels at which a foundation and/or its partners consult or engage local residents in designing, implementing and evaluating solutions to pressing community challenges.

The Resident Engagement Spectrum is presented as a diagram that illustrates two categories of activities undertaken by community foundations that involve residents: Resident **Consultation** and Resident **Engagement**.

Resident Consultation refers to practices in which residents receive information from – or participate in programs of – the foundation and/or its partners with little or limited input into design, implementation and evaluation.

- At the most basic level, residents receive or learn information about community issues and foundation initiatives from the community foundation and/or its partners.
- In some cases, the community foundation and/or its partners might ask residents to provide input on community issues or initiatives through surveys, focus groups or meetings.

Resident Engagement refers to practices in which residents work closely with the community foundation and/or its partners to design, implement and evaluate solutions to pressing community issues.

- Residents might advise or influence the community foundation and/or its partners on decisions affecting the community by serving on advisory groups or engaging in listening campaigns (voicing concerns and designing solutions).
- At the highest-touch level, residents actually work with the community foundation and/or its partners to set the agenda and drive change.

How the Resident Engagement Spectrum is organized

- The Resident Engagement Spectrum (page 13) defines the four types of resident consultation and engagement and lays them out in a diagram. The Resident Engagement Spectrum diagram can be helpful in introductory conversations about resident engagement.
- Four supplementary handouts (pages 14-17) provide a more in-depth description of each type of resident consultation or engagement. The handout for each of the four types includes:
  - Consultation or engagement tactics
  - Examples
  - Benefits
  - Challenges
- A separate document (pages 18 and 19) lists the Practices for Success – building blocks from the *Framework for Community Leadership by a Community Foundation* – needed for each approach.
- Page 20 provides additional resident consultation and engagement scenarios that can be used in Part 2 activities.

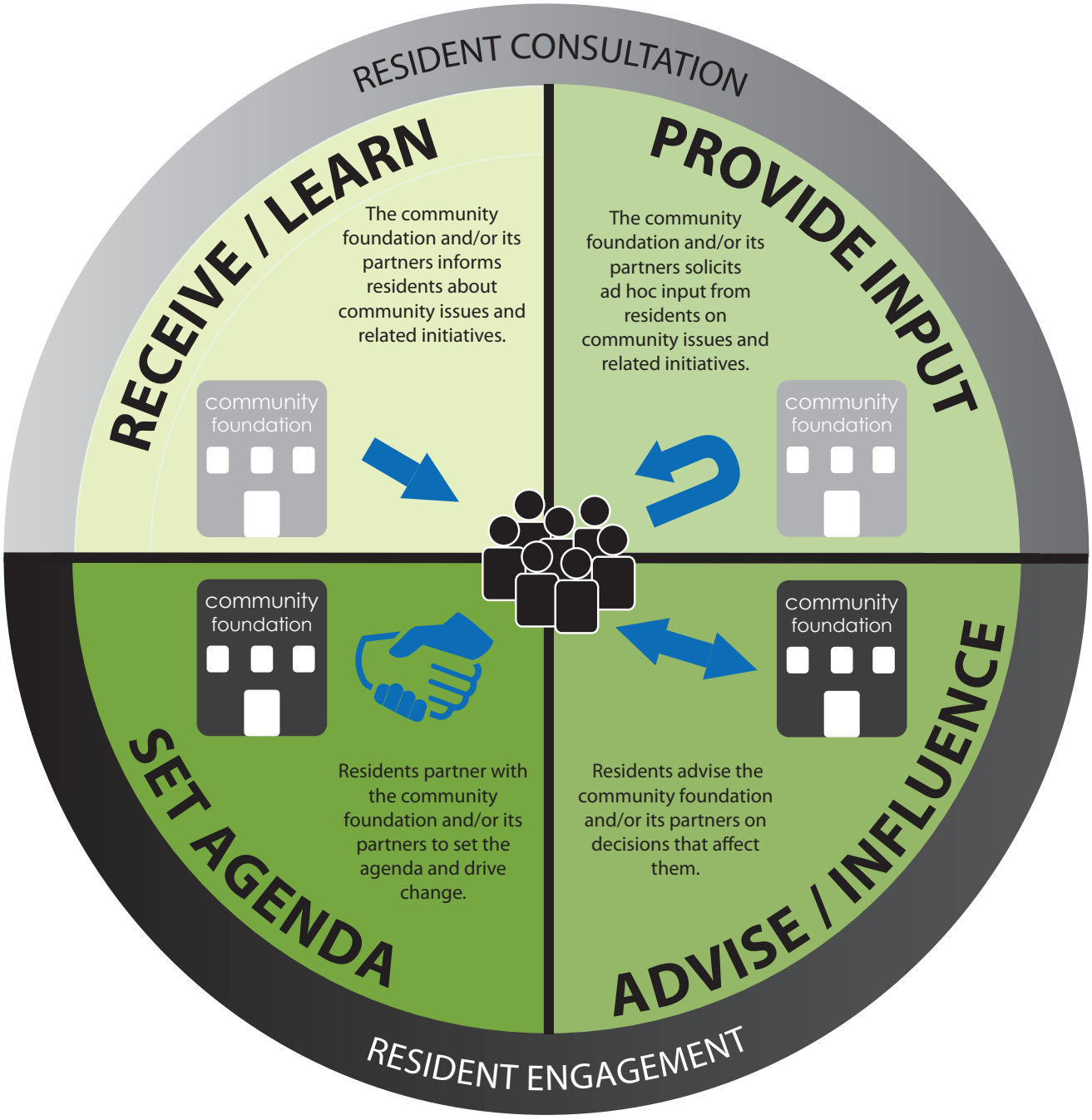
Thinking and Working with the Resident Engagement Spectrum

The Resident Engagement Spectrum and supplementary handouts are intended to help your community foundation develop a shared understanding of what resident engagement is, to gauge where you currently land on the spectrum, and to determine the next best step to take to advance your resident engagement practice. Keep in mind:

- Residents may play different roles in community foundation efforts depending on the activity, timeline and goal.
- The community foundation may play different roles depending on the activity, timeline and goal.
- The community foundation may never directly work with residents but instead support partners already engaging residents.

- You can learn a lot from stories about how to engage with residents more deeply, but it's up to you to determine what strategies make sense in your geographic, cultural, and organizational context.
- Your exploration of resident engagement may surface tough questions on issues such as power, race, class, culture and more. In order to successfully and substantially strengthen your resident engagement practice, we suggest you take advantage of resources on page 9 (or others you are familiar with) to engage your foundation in a deeper dialogue around these issues.
- Remember that resident engagement is just one piece of community leadership. In order to reflect on other elements of community leadership, refer to the complete *Framework for Community Leadership by a Community Foundation*.

Resident Engagement Spectrum

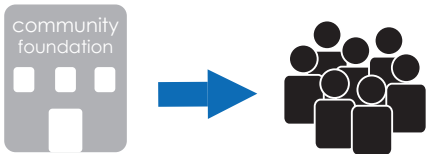


Resident Consultation

Receive / Learn

Resident Role

The community foundation and/or its partners inform residents about community issues and related initiatives.



Consultation Tactics

Residents receive information from the community foundation and/or its partners through community events, media, materials, and other sources. The intent is to help residents understand community issues and opportunities so that they can make informed, thoughtful decisions in both their personal and civic lives. For example, the foundation and/or its partners invite residents to hear the results of a local environmental study or share data from a community indicators project.

Example

A community foundation conducts or funds research and finds that teen smoking is on the rise in the community. In response, the community foundation funds a public awareness campaign to discourage smoking. Anti-smoking presentations are given at local meetings, and public service announcements targeted at youth are created and delivered by local media.

Benefits

By using this approach, the community foundation and/or its partners have the opportunity to reach many residents and build visibility within the community. The community foundation may come to be seen as a credible source of information in the community through this approach.

Challenges

As the one-way arrow on the Resident Engagement Spectrum indicates, this is an activity in which residents receive information or services from the community foundation and/or its partners but are not actively engaged by them. Residents may or may not see the information or services that are provided as relevant to them. While the community foundation and/or its partners may provide residents with information or initiatives deemed valuable or interesting, this activity is not designed to build or strengthen relationships.

Resident Consultation

Provide Input

Resident Role

The community foundation and/or its partners solicit ad hoc input from residents on community issues and related initiatives.

Consultation Tactics

Residents are asked to share input on community foundation and/or partner activities through surveys, foundation-led and/or foundation-convened community meetings or events, and focus groups.

Example

A community foundation has decided that it wants to conduct a public awareness campaign to discourage teen smoking. Before doing so, the community foundation hosts a number of focus groups with local teens to determine what type of awareness campaign teens think would be most effective. The foundation collects ideas from the teens and begins running the awareness campaign. The campaign messages generate local conversations about the issue and teens who participated in the focus groups begin engaging in conversations with their friends about the issue of smoking.

Benefits

By using this approach, the community foundation can be introduced to new perspectives and different ideas that help target the community foundation's actions and produce better results. Residents have an opportunity to share their ideas and opinions, and solutions identified will likely be more appropriate than had residents not been consulted. If the consulted residents see their perspective reflected in the community foundation's and/or partner's action, their opinion of and respect for the community foundation will likely improve.

Challenges

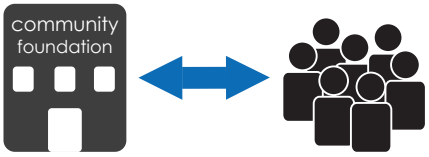
As the arrow on the Resident Engagement Spectrum indicates, the community foundation and/or its partners reach out to residents, who in turn provide input. This process may frustrate residents if the community foundation and/or its partners do not act on the input provided. Staff must also have the skills necessary to manage the process of reaching out to residents, particularly residents previously not engaged or under-engaged, and individuals who are low-income or people of color. Community foundations and/or their partners must also be mindful about appointing or consulting "gatekeepers" and leaving other residents out of the process.

Resident Engagement

Advise / Influence

Resident Role

Residents advise the community foundation and/or its partners on decisions that affect them.



Engagement Tactics

Residents advise the community foundation and/or partners in decision-making by serving on community foundation advisory committees and/or working groups. Residents are asked to share their perspective on community issues through activities such as listening campaigns and community dialogues or exchanges. These exchanges then lead the community foundation and/or its partners to engage in targeted action in partnership with residents.

Example

A community foundation holds a listening campaign to understand issues local teens face. While smoking is noted as an issue, what the teens deem more problematic is a lack of structured after-school activities. Hearing this as an issue, the community foundation decides to set up an advisory group with youth representation to advise the foundation on grantmaking related to the issue. Youth are excited to see that the community foundation cares about an issue of real importance to them. Teens who participate in the advisory group develop leadership skills and feel invested in the community.

Benefits

As the arrow on the Resident Engagement Spectrum indicates, this is a two-way process with information and input going back and forth between the community foundation and/or partners and residents. By using this approach, activities and decisions at the community foundation may be more likely to reflect the needs of residents and residents have some level of influence in decisions. Other benefits for the community foundation include building relationships with residents and staff and board members being energized and inspired by working with residents. Residents benefit from this approach as they have the opportunity to acquire new skills and connections and participate in new ways.

Challenges

In addition to the challenges found when residents are consulted, a community foundation and/or its partners may find they don't have the flexibility to act on the input of residents. The community foundation may find that existing processes – including grantmaking priorities, grant applications, grant due dates, etc. – need to be adjusted and/or changed to be able to go in new directions and engage in new types of community leadership. When engaging residents in this way, it is important to communicate both the short- and long-term benefits to board members and donors.

Resident Engagement
Set Agenda

Resident Role

Residents partner with the community foundation and/or its partners to set the agenda and drive community change.

Engagement Tactics

Residents set the agenda by designing and leading efforts to assess and act on community priorities. Community organizing or other intensive community processes are some tactics used to mobilize residents to act on community issues. Residents may decide to use data and/or policy to address an issue and may serve on the community foundation board or committees where they have decision-making power.

Example

A community foundation holds a listening campaign and finds that teens want more after-school activities. The foundation encourages the teens to organize a working group to take on the issue and offers the teens training support. The teens decide to take on the issue and work together to research and identify strategies to increase and strengthen after-school activities. They use what they learn to successfully lobby for the school administration to make changes. Through the process, the teens build research, advocacy, confidence and leadership skills.

Benefits

Benefits of this approach include a greater likelihood of improving the lives of residents as the decisions made by the community foundation and/or its partners are shaped by residents. Residents benefit by acquiring new skills and connections. They develop confidence and competence to move on to other issues and/or sustain the work over time. The community foundation and/or its partners benefit from having staff with the skills to engage residents and new leaders in the community are discovered and developed. As the handshake on the graphic indicates, the community foundation and/or its partners and residents are truly working in partnership with one another. Because relationships are based on mutual respect and trust, community impact is deeper and longer-lasting.

Challenges

Similar to the challenges mentioned previously, the community foundation and/or its partners must have the flexibility to go in new directions and a willingness to allow residents to set the agenda. This requires that staff and board members be actively involved - participating in networks and nurturing relationships with residents throughout the community. Staff and board members need to have relationships with broad constituencies and be willing to leverage those relationships. They need to serve as "bridge builders" that connect residents to traditional community leaders in positions of power. Staff need the time, sensitivity and skills to build long-term relationships to sustain the work.

Practices for Success

Community foundations and their partners need a variety of skills and capacities – referred to here as Practices for Success – when working with residents. Drawn from the building blocks in the *Framework for Community Leadership by a Community Foundation,* the practices for success of each approach builds on the previous one, such that the "Set Agenda" approach encompasses all the practices for success listed. For more information about the *Framework for Community Leadership by a Community Foundation,* see "Readings and Resources" on pages 8 and 9.

Receive/Learn

A2b: The community foundation board and committees are made up of people who have demonstrated a passion for the community's well-being.

Provide Input

A2d: The community foundation staff have an understanding of their community and the ability to work comfortably in multiple settings and places and at multiple levels.

B1a: The community foundation demonstrates respect for the assets (e.g., knowledge, relationships, experience, capacities, etc.) of residents and community partners.

B1c: The community foundation meets residents and other stakeholders where and when it is convenient for residents and other stakeholders.

B1d: The community foundation understands and acknowledges community members' multiple viewpoints and perspectives.

D2b: The community foundation understands the networks of organizations, individuals and associations working on community improvement.

Advise/Influence

A2c: The community foundation board, committees and staff are generally drawn from throughout the community and seen as being part of the community.

B1b: The community foundation engages diverse people, including people who have not historically been engaged and people who have been under engaged, from all parts of the community in setting goals and solving community problems.

B1e: The community foundation actively listens to the community, creates opportunities for continuous feedback, and follows through on commitments made to realize shared goals.

C1a: The community foundation offers convening space while making it clear that they are ready to meet residents and other stakeholders where and when it is convenient for the residents and other stakeholders.

C1b: The community foundation joins with the community in facilitating, creating, commissioning and sharing research, data and metrics that help strengthen planning, advocacy and implementation efforts.

C1c: The community foundation facilitates connections among residents, government, corporate and nonprofit decision-makers.

C1d: The community foundation makes connections among people from different cultural, racial/ethnic and socio-economic backgrounds.

C1e: The community foundation helps leverage financial and other resources from residents, other private funders and the public sector.

D2a: The community foundation understands the influence of race, class, culture and power and has the competencies to facilitate ongoing dialogue about these issues and others.

Set Agenda

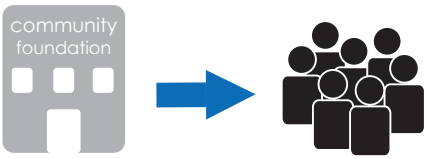
A2a: The community foundation supports broad community involvement in and community ownership of the shaping of community visions, possible solutions and collective actions around common concerns.

D2c: The community foundation understands the processes (e.g., community organizing, formal public engagement processes, organizational change efforts, etc.) that support community improvement.

D2d: The community foundation is able to cultivate an understanding of relevant systems (e.g., education, public health, community economic development, etc.) that provide services and shape the context for the health and well-being of the community.

D2e: The community foundation helps to ensure coordination and collaboration among processes and systems that support community improvement and when necessary works to reform or strengthen those systems.

Additional Resident Engagement Spectrum Scenarios

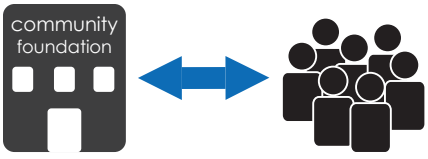


Resident Role: Receive/Learn

As part of a community indicators project, a community foundation funds a report on local water pollution. The report is distributed to residents and the media.

Resident Role: Provide Input

As part of a community foundation creating a new focus on environmental issues – specifically, water pollution – the community foundation convenes residents to provide input on the environmental issues of most concern to them. The community foundation finds that air pollution – not water pollution – is the top concern for residents. The community foundation commissions research on the status of air pollution in the community and distributes the findings widely.



Resident Role: Advise/Influence

The community foundation holds a listening campaign to determine what issues are of the greatest concern to residents. While jobs and child care are noted as issues of concern, the issue of greatest concern is air pollution. The community foundation creates a committee of residents who advise the community foundation on research to commission. Residents and community foundation staff provide the research to local elected officials and policymakers. Residents deliver the research to local elected officials and are able to garner press attention for their work.

Resident Role: Set Agenda

A community foundation is approached by a local environmental justice group that has conducted research to determine that air pollution is causing serious illness in the community. The foundation provides funding for a strategic planning process and civic-change trainings for individuals. Action by the residents spurs the EPA to raid a local plant omitting dangerous chemicals. The company is found guilty of violating pollution laws and is fined.

• ACTIVITY 2A •

Introducing the Resident Engagement Spectrum

Purpose:

This activity is organized around the Resident Engagement Spectrum and is designed to help your community foundation think about and better understand the different types of resident consultation and engagement and to examine your own community foundation's current activities, interest and concerns in doing more. It is through this dialogue that you can reach new understanding about the extent to which the community foundation currently practices resident engagement and how you want to change or strengthen your practice in the future.

Objectives:

After completing this activity, participants will be able to:

- Distinguish between resident engagement and resident consultation.
- Identify ways the community foundation and/or its partners are currently practicing resident engagement.
- Articulate opportunities and concerns in engaging residents more deeply in addressing issues that affect them.

Materials Needed:

- Resident Engagement Spectrum diagram on page 13 *(either printed or on screen)*
- Additional Resident Engagement Spectrum scenarios on page 20 *(printed)*
- Discussion questions *(either printed or on screen)*
- Flip chart paper
- Markers
- Post-its

Preparation for Activity 2A

Get familiar

As the organizer of this session, familiarize yourself with the Resident Engagement Spectrum and decide how you want to structure the session. A suggested approach and discussion questions are included here. *This activity is most useful following Activity 1A: Reading into Resident Engagement.*

Send advance materials

In advance of the meeting, send participants the "Additional Resident Engagement Spectrum Scenarios" handout and ask them to read them as preparation for your discussion. Ask participants to come to the meeting ready to discuss the following questions:

- What was different – in terms of approach, resident or foundation role, activities or results – across the four scenarios you read?
- What did you see as the benefits – to the community or to the foundation – of each approach?
- What did you see as the risks – to the community or to the foundation – of each approach?

Activity 2A: Introducing the Resident Engagement Spectrum

Review the Resident Engagement Spectrum Scenarios

Briefly review the Resident Engagement Spectrum examples you shared in advance.

Opening Discussion

Structure the opening conversation around the discussion questions you sent in advance. This can happen in a large group or you can break into smaller groups.

Introduce the Resident Engagement Spectrum

After the opening discussion:

- Explain each type of resident consultation and engagement pointing out where the scenarios the group just discussed fit.
- Open the floor for questions, comments, ah-ha's, and criticisms of the Resident Engagement Spectrum and what you've discussed up to this point.

Discuss Resident Engagement and Our Community Foundation

Bring the Resident Engagement Spectrum into your own foundation's context. Potential discussion questions might include:

- What efforts/initiatives is our group/community foundation currently involved in that fall into the Advise/Influence or Set Agenda sections of the Resident Engagement Spectrum? What qualities make them fit there?
- What are one or two concerns we have about engaging with residents more deeply?
- What are the one or two things that most excite us about taking on a deeper resident engagement approach?
- Over the next three years:
  - Where does this group and/or community foundation want to be (same place, deeper engagement, less engagement)?
  - Do we want to focus our resident engagement efforts on one or two major projects or in all that we do?
  - What role(s) do we see various staff and board members playing?
- What additional questions did today's discussion raise for us?

Next steps:

- Continue the conversation with *Taking a Deep-Dive into Resident Engagement* (Activities 2B, 2C, and 2D), where resident engagement is explored in greater detail.

• ACTIVITIES 2B, 2C, 2D •

Taking a Deep Dive into Resident Engagement

Purpose:

Activities 2B, 2C, and 2D are designed to help community foundation staff and board members have a more focused and intentional conversation about resident engagement — what it looks like and what it takes, and the challenges and benefits associated with strengthening their own resident engagement approach.

Preparation for Activities 2B, 2C and 2D

Get familiar

As the organizer of your resident engagement exploration, familiarize yourself with the Resident Engagement Spectrum, supplementary handouts and the activity ideas below. Feel free to mix and match activities to suit what works for your community foundation's resident engagement exploration or consider using them all across a series of sessions.

Activity 2B: Making Connections

Objectives

This activity is designed to help participants think about the value of resident engagement, using the lens of personal experience. It will also help build relationships among participants as individuals share personal stories with one another and discover common values or interests.

Materials Needed

- Questions from Making Connections Activity below *(either printed or on screen)*
- Flip chart
- Markers
- Post-its

Preparation and Activity Flow

Send the "Making Connections Activity" instructions below to participants in advance of the session.

During the session, have participants share their reflections with each other in small groups. After the small group discussion, ask each group to report back on themes and ah-ha's. Then, engage in a full group discussion about how this informs their thinking about resident engagement.

Making Connections Activity

In small groups: Everyone share a time in your life – personally or professionally – when you or someone you know has done something to incorporate another person's perspective or interest in an activity or decision. Or, alternatively, share a time in your life when someone you know did something to include YOUR perspective or interest in an activity or decision. (*Note that your example can come from work or school experience, your family, your child's school experience, a community activity, etc.*)

- Set the scene… what was the activity or decision being made?
- Why was it important to have that person at the table? (Or, why was it important that *you* be at the table?)
- What did you do to get that person to the table? (Or, what did that person do to get *you* to the table?)
- Was the process easy or difficult—why?
- Were you successful in getting them to the table?
- What happened as a result? Would the outcome have been different if they had not been at the table?

Full Group Discussion

After the report-out from small groups, engage in a full-group discussion. Questions might include:

- How did this activity inform, affirm, or change your thinking about engaging residents in decisions that affect them?
- Can you think of examples where community foundation staff or board made a similar effort to include certain voices at the decision-making table? Why was that important? Would the outcome have been different if those voices had not been included?
- Why might our community foundation want to engage residents more deeply in certain efforts or initiatives?

Activity 2C: Seeing the Spectrum

Objectives

After completing this activity, participants will better understand what resident consultation and engagement can look like in the context of a community foundation and will be familiar with the skills and capacities needed to connect with residents at different levels.

Materials Needed

- Resident Engagement Spectrum diagram on page 13 *(either printed or on screen)*
- Resident engagement/consultation examples from pages 14-17, making sure to remove the resident role and all other content *(either printed or on screen)*
- Practices for Success on pages 18 and 19.
- Flip chart
- Markers
- Post-its

Preparation and Activity Flow

Start the activity by introducing the Resident Engagement Spectrum and its four quadrants to the group. Highlight the similarities/differences across each type of resident engagement and consultation. *If this is the first time participants are being exposed to the Resident Engagement Spectrum, you may need to spend a good bit of time on this.* Then, break into small groups and have participants engage in a conversation about four resident consultation/engagement examples. Close the activity by having small groups report back and debrief their discussions.

Seeing the Spectrum Activity

Break into small groups and ask everyone to read the four resident engagement/consultation examples (without telling them where the scenarios fit on the spectrum). Provide each group with several discussion questions, such as:

- Who were the residents the community foundation/partner were trying to reach?
- What action did the community foundation/partner take in this scenario?
- What happened as a result of the community foundation/partner actions? How did their actions impact residents, the community, and/or the community foundation?
- Where on the Resident Engagement Spectrum do you think this example fits? Why?
- Which Practices for Success are demonstrated through this example of resident consultation or engagement?
- What questions did this activity raise for you?

Small groups then report back to the full group on any highlights, themes or ah-ha moments. Other full-group discussion questions might include:

- Did any of these examples sound familiar to something our community foundation or partners are doing or have done in the past?
- Did you notice any Practices for Success where our community foundation is particularly strong? Any Practices where our community foundation is particularly weak?
- What other questions, concerns, or insights do you have?

Activity 2D: Resident Engagement and Our Community Foundation

Objectives

After completing this activity, participants will be able to articulate what resident engagement currently looks like in the context of your own community foundation and what it could look like in the future. Participants will also gain deeper understanding of the skills and capacities the community foundation and/or its partners must develop in order to engage residents more deeply.

Materials Needed

- Resident Engagement Spectrum diagram on page 13 *(either printed or on screen)*
- Practices for Success on pages 18 and 19.
- Flip chart
- Markers
- Post-its

Preparation and Activity Flow

Prior to the session, print copies of the Resident Engagement Spectrum and Practices for Success handout.

Start the activity by introducing the Resident Engagement Spectrum and its four quadrants to the group. Highlight the similarities/differences across each approach. *If this is the first time participants are being exposed to the Resident Engagement Spectrum, you may need to spend a good bit of time on this.* Then, break into small groups and have participants engage in a conversation about resident engagement in your own foundation context. Close the activity by having small groups report back and debrief their discussions.

Resident Engagement and Our Community Foundation Activity

Bring the Resident Engagement Spectrum into your own community foundation's context through small group conversations. Questions might include:

- What efforts or initiatives are we and/or our partners currently involved in that fall into the *Advise/Influence or Set Agenda* sections of the Resident Engagement Spectrum? What qualities make them fit there?
- With those efforts and initiatives in mind, look at the Practices for Success handout. For each initiative, rate our community foundation/partner on each Practice for Success. What are our weakest practice areas? Somewhat developed practice areas? Strongest practice areas?
- Which of our practice areas do we most need to strengthen? Why? And what will it take to strengthen them?
- Where do you see our foundation's/partner's resident engagement efforts going in the next three years – e.g., piloting resident engagement in certain initiatives, embedding it throughout all of our work, building internal capacity for resident engagement, collaborating with a partner, etc.?
- What are the potential risks of moving in that direction?
- What are the potential benefits of moving in that direction?
- What do we consider to be our biggest resident engagement challenge – something we would like to take action on over the next year?
- Is this an internal challenge (a skill or capacity we need to focus on developing within the organization), or an external challenge (something we need to change about the way we connect with residents)?

Next steps:

- Use the activities in Part 3 to determine and carry out your next best steps in engaging residents more deeply in your community.

• PART 3 •

From Understanding to Action

Part 3: From Understanding to Action is a set of tools that are designed to take what staff and board members have learned about resident engagement in a community foundation context and move them toward action. Activities in Part 3 include:

- **Status Assessment Tool**, which uses the *Framework for Community Leadership by a Community Foundation* to help determine the community foundation's resident engagement strengths at a particular point in time.

- **Designing for Impact Tool**, which can help the community foundation clearly articulate an issue or area of work where it wants to engage residents more deeply and describe what the engagement process will look like.

- **Action Planner Templates**, which can help the community foundation define the specific steps it must take to engage residents more deeply in addressing community issues or strengthen specific resident engagement building blocks.

- **Resident Engagement Check-Up**, which can help the foundation track and evaluate its resident engagement efforts and consider how to strengthen its approach in the future.

Tool 3A • Status Assessment Tool: Resident Engagement

Purpose

The *Framework for Community Leadership by a Community Foundation* incorporates levels of building blocks essential to consistent, effective leadership. The *Framework* serves as a foundational document on community leadership for the field.

The Community Leadership Framework Status Assessment Tool (CL SAT) is designed to help you gauge your community foundation's community leadership strengths at a particular point in time, to identify the priority community leadership capacities that you want to strengthen, and to set you on a path toward doing so.

Building blocks A2, B1, C1, and D2 were added or updated in 2013 to address one specific community leadership practice: engaging residents. Users of this tool are encouraged to complete the checklist rating for all building blocks in order to gauge your community leadership strengths and challenges.

Objectives

Overall, the **CL SAT** helps you use the **Community Leadership Framework** as a simple checklist for considering the attributes and capacities your community foundation has in place to engage in community leadership—and identifying the next steps you need to take to achieve those attributes/capacities that you want but don't have. Used with the *Community Leadership Framework* and its building blocks – it can help your board and/or staff:

- Use an easy rating system to develop a shared sense of how strong each of the second-level building blocks in the *Community Leadership Framework* are in your foundation.
- Surface any differing perceptions of your community leadership strengths and weaknesses – and discuss them.
- When used on a regular basis – for example, annually – see the progress you are making in strengthening your community leadership capacity, and note when building blocks need bolstering.
- Set priorities for specific building blocks you want to strengthen right now.
- Analyze – by reviewing the third-level building blocks related only to your priorities – the particular capacities you want to strengthen.
- Summarize and track your action plan for strengthening your priority building blocks.

Materials Needed

- Community Leadership Framework Status Assessment Tool (CL SAT) – you may want to print part of it, or all of it, depending on what your focus will be
- Any notes from previous sessions that would be helpful (on-screen, printed or sent in advance)
- Flip chart
- Markers
- Post-its

Set a Process

First, design the process in which you will use the CL Status Assessment Tool. Determine:

- ***Who will participate?*** Use this tool with an Assessment Team. For example, you might use this tool with the entire board and staff, or with a key committee or special ad hoc group.
- ***Organized how?*** You can have the entire group fill out the entire assessment. Or split into more than one group, and have each group complete the entire assessment and then compare results (always a revealing practice!). Or split into groups and have each group focus on assessing one of the four main building blocks. Or … create another option.
- ***Over what period of time?*** It's best to use this tool at regular intervals, at least annually, to check back on your action and progress. Likewise, it makes sense to conduct the assessment in a time-limited process, over a specified two weeks or month, for example.
- ***Connected to what other action?*** The CL SAT is a stronger tool when accountability to its results are woven into other community foundation activities – whether that is action planning on specific projects, regular evaluations in which you check back on how your SAT score has changed, staff development and performance appraisals, or strategic planning.

Tool 3A • Status Assessment Tool: Resident Engagement

Gather

Assemble your Assessment Team or Teams – according to your plan – in person, on the phone, or in an electronic meeting to conduct the assessment.

Rate the Building Blocks

Complete the check-list rating in the CL Status Assessment Tool that begins on page 30. Again, according to your particular plan, have your team or teams do so as follows:

- First, as individuals, rate each second-level building block – in answer to the question: How strong is our foundation in relation to this Building Block? – by placing a check mark (•) in the appropriate box.
- Assign each answer a grade/number score: Barely (1), So-So (2), Fairly (3) and Very (4). Add up your individual scores to come up with the Group Average.
- If you have used the SAT in the past, note whether the Group Average has gotten better, worse or is the same since your last assessment.

Process Pointers

- *You can have each team member complete their check list rating prior to your working session, and submit them to the team leader in advance to fill in the Group Average and the "How Moved?" column. (Doing so anonymously may increase candor.)*
- *Alternatively, you could complete the entire rating as a group, discussing as you go. This might surface obvious points more quickly, but likely will not give equal voice to all team members. It works best with a team that has an established a record of trust and frankness.*

Discuss and Prioritize

With the initial ratings complete, it's time to talk through what they mean for your foundation.

- ***Note clear results.*** Have your Assessment Team or Teams walk through the results. Notice the second-level building blocks where your community foundation is strong and not so strong – or where it has made progress or declined since your last assessment (if relevant).
- ***Note differences*** – and clarify. If different members of your team produced widely differing ratings on any building blocks, discuss it, and see if you need to adjust your rating. Likewise, if you are comparing the assessment results of more than one team, notice where your building block ratings differ. Discuss those differences to arrive at a consensus rating.
- ***Identify a few priorities for strengthening.*** Based on the results, and on your knowledge of what your foundation is taking on over a specified timeframe – the next six months or year, for example – choose a few priorities for strengthening.
- ***Get more specific about what you need to strengthen.*** Using the Community Leadership Framework as your reference, identify third-level building blocks that you need to strengthen in relation to each priority second-level building block.
- ***Recognize and celebrate!*** If you have noted clear progress on a building block, or if you are simply happy that you have some very strong building blocks, give credit where it is due, and celebrate appropriately!

Process Pointers

- *Always have the Community Leadership Framework on hand as you work with the SAT.*
- *Make sure you have a good block of time to discuss differences and set priorities. This is a critical part of the process – it is the most important "value" that the tool "adds."*
- *Limit the number of priorities you set within an action time period to no more than five.*
- *If you find some disagreement on the second-level building block ratings, you may find that reviewing and discussing the relevant third-level building blocks will help you understand your differences and clarify a rating.*
- *It's important to complete the rating and priority-setting process – that is, your inventory of the entire Framework – before developing action steps. Why? Because some of your strategies might end up addressing more than one priority building block!*

Tool 3A • Status Assessment Tool: Resident Engagement

Begin to Plan

Once you've identified the five or fewer priority second and third-level priority building blocks you want to strengthen over your specified action period, it's time to begin to sketch out action steps. Use the SAT tool two ways to do this:

- ***Brainstorm and narrow.*** Work with the team to brainstorm tactics and strategies you might use to strengthen your priority building blocks. Narrow those to your lead ideas and list them in the Key Action Step box. For each Key Step, list a "Lead" person who will be responsible for pursuing it, and the relevant time frame for that next step.
- ***Notes and Observations.*** Use this space to record all any really important insights, details or caveats you want to remember in relation to the priority building blocks and your action plan next time you do your assessment.

Process Pointer

- *You could alternatively use the Key Action Step block as a shorter-term "Next Steps" task list, detailing research or outreach you need to do before developing a real Action Plan.*

Proceed!

Assign staff and board members to devise a fuller action plan using the Community Leadership Action Planner Tool.

Repeat

Use this tool at regular intervals to help you "see" progress, celebrate it, and get stronger over time.

Date of assessment:						Time Period for Action Steps:			
The community foundation manifests the values, culture, and will to exercise community leadership.									
Second -Level Building Blocks ?	How strong is our Foundation in relation to this Building Block?					How has this moved since our last SAT? Better / Same / Worse	**Is improving this a Top Priority?**	**For Top Priorities Only** What THIRD-LEVEL BUILDING BLOCKS *must* we strengthen to get better?	**Notes and Observations** Things to keep in mind as we plan our action - or when we check back in for our next Community Leadership SAT!
	Barely	So-so	Fairly	Very	Group Average				
1. We are committed to effecting change that advances the **common good.**									
2. We are **of, by, and for the community** we serve.									
3. We are fundamentally committed and organized to increase **opportunity, diverse participation and fairness.**									
4. We are a **results-driven learning** organization.									
5. We are **humble, respectful, and transparent.**									
Key Action Steps to address PRIORITY Building Blocks See Community Leadership Action Planner - ***and transfer these steps into that tool.***								**Lead Responsible**	**Time Frame**

Date of assessment:						Time Period for Action Steps:			
The community foundation continuously builds the relationships to exercise community leadership.									
Second -Level Building Blocks ?	How strong is our Foundation in relation to this Building Block?					How has this moved since our last SAT? Better / Same / Worse	**Is improving this a Top Priority?**	**For Top Priorities Only** What THIRD-LEVEL BUILDING BLOCKS *must* we strengthen to get better?	**Notes and Observations** Things to keep in mind as we plan our action - or when we check back in for our next Community Leadership SAT!
	Barely	So-so	Fairly	Very	Group Average				
1. We are an **engaged and trusted** community partner.									
2. We are positioned to **join with or convene** those involved in, affected by, or concerned about an issue.									
3. We **engage and support other community leaders.**									
Key Action Steps to address PRIORITY Building Blocks See Community Leadership Action Planner - ***and transfer these steps into that tool.***								**Lead Responsible**	**Time Frame**

Date of assessment:						Time Period for Action Steps:			
The community foundation accesses and develops the resources necessary to exercise community leadership.									
Second -Level Building Blocks ?	How strong is our Foundation in relation to this Building Block?					How has this moved since our last SAT? Better / Same / Worse	**Is improving this a Top Priority?**	**For Top Priorities Only** What THIRD-LEVEL BUILDING BLOCKS *must* we strengthen to get better?	**Notes and Observations** Things to keep in mind as we plan our action - or when we check back in for our next Community Leadership SAT!
	Barely	So-so	Fairly	Very	Group Average				
1. We serve as a place for residents to connect with intellectual, political social and financial capital.									
2. Our **internal information and implementation systems** maximize our ability to influence community change.									
3. We have the human resources to exercise community leadership.									
4. We engage **donors and other co-investors** in community leadership work.									
5. Our business model provides flexible financial resources to support community leadership efforts.									
Key Action Steps to address PRIORITY Building Blocks See Community Leadership Action Planner - ***and transfer these steps into that tool.***								**Lead Responsible**	**Time Frame**

Date of assessment:						Time Period for Action Steps:			
The community foundation accesses and develops the understanding and skills to exercise community leadership.									
Second -Level Building Blocks ?	How strong is our Foundation in relation to this Building Block?					How has this moved since our last SAT? Better / Same / Worse	**Is improving this a Top Priority?**	**For Top Priorities Only** What THIRD-LEVEL BUILDING BLOCKS *must* we strengthen to get better?	**Notes and Observations** Things to keep in mind as we plan our action - or when we check back in for our next Community Leadership SAT!
	Barely	So-so	Fairly	Very	Group Average				
1. We actively learn about, with, and for the community.									
2. We have the **skills to help residents and other stakeholders** be involved in and drive community improvement efforts.									
3. We stimulate **dialogue**, promote understanding, and build consensus.									
4. We strategically **craft and act** on community leadership opportunities.									
5. We engage in **public policy** to advance the common good.									
6. We **evaluate** the impact of our community leadership work.									
Key Action Steps to address PRIORITY Building Blocks See Community Leadership Action Planner - ***and transfer these steps into that tool.***								**Lead Responsible**	**Time Frame**

Tool 3B • Designing for Impact

Purpose:

The Designing for Impact Tool helps program staff (or others who are deeply involved in your resident engagement efforts) think through and clearly articulate an issue or area of work where the community foundation wants to engage residents more deeply and what the engagement process will look like. Once the contours of the engagement process are in place, use the Action Planner Templates (Tool 3C) to outline the specific steps you need to take to get started.

Objectives

This tool helps staff:

- Articulate an area of work where you want to engage residents more deeply and detail the reasons this is important to your community foundation.
- Describe what impact you hope to see – on residents, on community issues and/or on the community foundation – and the engagement tactics you think will get you there.
- Identify the skills and capacities that need to be strengthened in order to undertake this resident engagement effort.

Materials Needed

- Designing for Impact template on page 35 and Example on page 36 (*printed*)
- Any notes from previous sessions that would be helpful (*on-screen, printed or sent in advance*)
- Flip chart
- Markers
- Post-its

Gather

Assemble a team including staff, board members, and/or key partners – in person, on the phone, or in an electronic meeting.

Complete

With your team, work through the Designing for Impact template on the next page. Complete each section in order:

1. **Resident Engagement Effort:** Describe the issue, effort or initiative you want to engage residents in more deeply.
2. **Residents:** State who the "residents" are that you want to engage in this effort. Think of this as the target population(s) you are trying to reach.
3. **Reasons:** List two or three reasons why you want to engage residents more deeply in this particular effort.
4. **Transformations:** Think about what you are trying to achieve by engaging residents in this effort. What impact do you hope to see – on residents? On the issue of community concern? On community foundation strategy? On community foundation resources? On relationships?
5. **Tactics:** Now that you have a clearer idea of what you hope to achieve through this effort, think through what kind of engagement tactics will help you get there. List specific tactics you will use to engage residents, such as:
   - Listening campaigns
   - Advisory groups
   - Community organizing
   - Leadership training

   Then describe the roles residents will play with each tactic you use. For example, residents might serve as:
   - Idea generators
   - Advisors
   - Advocates
   - Organizers/leaders
   - Decision-makers
6. **Resident Engagement Hypothesis:** Now that you have articulated what you hope to achieve and how you hope to get there, you are ready to craft your resident engagement hypothesis. Your resident engagement hypothesis simply takes the ideas you came up with in Steps 4 and 5 and transforms them into a short if/then statement about what you think you will achieve through this effort.
7. **Skills and Capacities:** At this point, you know the contours of your resident engagement effort. Now, what skills and capacities does the community foundation have in place that will make this effort successful? What skills and capacities need to be strengthened? For guidance, refer back to Practices for Success in Part 2.

Next Steps:

Once you have completed the Designing for Impact Template, use it to draft an Action Plan (Tool 3C). Your action plan will outline the specific steps needed to get your resident engagement effort underway and will define a process for tracking your progress.

Designing for Impact Tool

1	**Resident Engagement Activity** - In *what* effort or initiative do we want to engage residents more deeply?	
2	**Residents** - *Who* are the residents we want to engage in this effort?	
3	**Reasons** - *Why* do we want to engage residents more deeply in this effort?	

4 – Transformations

What is the intended impact on…

5 – Process

What tactics will we use to achieve the impact we seek?

What role(s) will residents play?

Engagement Tactic...	*Resident Role(s)...*

Resident Engagement Happened

Residents	
The Community Issue of Concern	
Community Foundation Strategy	
Community Foundation Resources	
Relationships	• *Resident to resident* • *Residents and Neighborhood/Local Institutions* • *Residents and Change Agents (inside or outside the community)*

6 – Resident Engagement Hypothesis

State what you've described above as a hypothesis. If [processes] happen, then [transformations] will occur.

If... then...

7 – Skills and Capacities

Using the Practices for Success handout, think through the skills and capacities that will be essential to carrying out your resident engagement effort.

*What are your **strongest** Practices for Success?*	*What are your **weakest** Practices for Success?*

Designing For Impact ***Example***

1	**Resident Engagement Effort** - In what effort or initiative do we want to engage residents more deeply?	• *Campaign for Grade-Level Reading*
2	**Residents** - Who are the residents we want to engage in this effort?	• *Latino parents with children under age 5*
3	**Reasons -** Why do we want to engage residents more deeply in this effort?	• *Significantly fewer Latino children are prepared for kindergarten than other children in our community* • *When parents are involved in their child's education at home, children are more prepared for school*

5 – Tactics

What tactics will we use to achieve the impact we seek?
What role(s) will residents play?

Hire and train Latino residents to serve as School Readiness Coordinators that work with parents to identify barriers / develop solutions to improve school readiness.

• *Residents are trained as leaders and advocates in their community and advise the community foundation on the issue of school readiness.*

Latino parents work with each other and the Coordinators to identify and advocate for changes that will improve their children's readiness for school.

•*Parents serve as idea generators (designing solutions) and advocates on the issue of school readiness.*

Resident Engagement Happened

4 – Transformations

What is the intended impact on…

Residents	•Latino parents are actively involved in their children's education at home. •Latino children enter kindergarten at grade-level. •Latino parents develop the skills to support and advocate for their children once they start school.
The Community Issue of Concern	•The achievement gap closes over time.
Community Foundation Strategy	•Our commitment to resident engagement extends to other areas of the foundation's work.
Community Foundation Resources	•Donors increase their support of our community leadership work.
Relationships	•Latino parents build relationships with each other, call on each other for support, and develop interest in addressing other issues together. •Latino parents build trusting relationships with the community foundation and educational institutions in the community.

6 – Resident Engagement Hypothesis

State what you've described above as a hypothesis. If [tactics] happen, then [transformations] will occur.

IF Latino parents are trained as leaders and advocates and co-develop solutions to improve their children's learning, THEN more Latinos will arrive at kindergarten at grade level, narrowing the achievement gap, the community foundation will deepen its commitment to resident engagement on all issues, and donors will increase their support for our community leadership work.

7 – Skills and Capacities

Using the Practices for Success handout, think through the skills and capacities that will be essential to carrying out your resident engagement effort.

*What are your **strongest** Practices for Success?*

- B1c. The community foundation meets residents and other stakeholders where and when it is convenient for residents and other stakeholders.
- B1d. The community foundation understands and acknowledges community members' multiple viewpoints and perspectives.
- D2b. The community foundation understands the network of organizations, individuals and associations working on community improvement.

*What are your **weakest** Practices for Success?*

- B1b. The community foundation engages diverse people, including people who have not historically been engaged and people who have been under engaged, from all parts of the community in setting goals and solving community problems.
- B1e. The community foundation actively listens to the community, creates opportunities for continuous feedback, and follows through on commitments made to realize shared goals.
- D2a. The community foundation understands the influence of race, class, culture and power and has the competencies to facilitate ongoing dialogue about these issues and others.

Tool 3C • Resident Engagement Action Planner

Purpose:

The Resident Engagement Action Planner is a focused planning tool designed to help program staff (or others who are deeply involved in your resident engagement efforts) outline the specific steps needed to engage residents more deeply in addressing a community challenge or to strengthen a particular resident engagement building block – or both – within one year or less. Note: This tool is most helpful if used in conjunction with Designing for Impact (Tool 3B).

Objectives

This tool helps staff:

- Clearly state an area of work where you want to engage residents more deeply and/or a resident engagement building block you want to strengthen.
- Surface and detail the reasons this is important to your community foundation.
- Describe what success will look like – in terms of results, indicators and measures.
- Craft an action plan that includes key steps, responsibilities, deadlines and process for tracking.

Materials Needed:

- Action Planner Template A and/or B depending on what your focus will be, found on pages 38-41
- Your completed Designing for Impact template, if you used that tool, found on page 35
- Any notes from previous sessions that would be helpful *(on-screen, printed or sent in advance)*
- Flip chart
- Markers
- Post-its

Gather

Assemble a team including staff, board members, and/or key partners – in person, on the phone, or in an electronic meeting.

Identify

If you haven't already done so, choose what it is you want to act on. If you used the Designing for Impact tool, you likely already know what it is that you want to act on. You may want to engage residents in identifying and/or addressing a community issue. Or, before connecting with residents more deeply, you may want to take some time to strengthen a particular resident engagement building block within the foundation.

Complete

Develop your action plan and measurement plan using one of the two Resident Engagement Action Planner Templates:

- Action Planner A will help you plan how to strengthen specific resident engagement building blocks.
- Action Planner B will help you plan how to engage residents in addressing a community issue.

Process Pointers

- *If you used the Designing for Impact Tool, you will have a head start in completing your Action Plan—simply copy sections of the Designing for Impact Template and paste them into the corresponding sections of the Action Planner. If you did not use the Designing for Impact tool – not to worry! You'll just need to take a little more time thinking through the first part of your action plan.*
- *Though your resident engagement effort may be longer term, focus your action plan on a short time frame. For example, if you use a timeframe of four-to-six months, your action steps are likely to be more discreet and doable – and the nearer-term deadlines will help you make and see progress.*
- *You can have one or two people draft the plan using the Template, and then sharpen it during a broader team discussion – in person, or by soliciting feedback comments.*
- *Include securing any key resources and partnerships you need as part of your action steps – and as indicators in your measurement plan.*

Repeat as needed

Check in on your action plan frequently and use this tool again to develop an action plan for your next time frame. Doing so at regular intervals can help you "see" and celebrate progress and keep you on track. It can also help you make critical mid-course corrections at the right time, rather than after it's too late.

ACTION PLANNER A *Our foundation seeks to:*	**Strengthen a specific resident engagement building block or capacity within the foundation.** *Examples: Build board understanding of resident engagement, involve donor services in resident engagement efforts, increase cultural competency, etc.*	
Focus Building Block or Capacity *What building block or capacity do we want to strengthen?*		
Reasons *Describe the top two or three reasons we are choosing to strengthen this particular resident engagement building block or capacity.*	1. 2. 3.	
Time Frame *Specify start and end dates for this Action Plan (one year or less).*		
Desired Results *List:* ***In Column A:*** *The top three most notable results we are going for in strengthening this building block or capacity.* ***In Column B:*** *One or two indicators that we will monitor and measure during this time period for each result to tell us whether or not we are on the right track for strengthening this building block or capacity.*	**A – Desired Results** *These three results will be "true" if we succeed with our work on this building block or capacity over time.*	**B – Measures** *We will measure these indicators to track our progress on the result in Column A during the time frame of this plan.* *Hint: Include both the indicator and amount and direction (increase, decrease, quality, presence) of "improvement" you are targeting.*
	1.	a. b.
	2.	a. b.
	3.	a. b.

ACTION PLANNER A continued…

Focus Building Block or Capacity: *From previous page…*	

Key Action Steps

What will we do to produce the desired results?

Specify up to three Key Action Steps we will take to strengthen a specific building block or capacity in this time frame.

Then detail specific substeps and the lead people, partners or groups responsible for each, along with interim deadlines.

Key Action Step 1:		
Substep	**Lead Responsible**	**Deadline**
Key Action Step 2:		
Substep	**Lead Responsible**	**Deadline**
Key Action Step 3:		
Substep	**Lead Responsible**	**Deadline**

Tracking

Tracking indicators and measures related to our desired results is always part of our action plan.

List here who and how we will do that for each measure we detailed above.

Indicator and Measure	**Who will track it? How?**	**Tracking Report(s) Due:**

Next Steps	• Revisit the *Status Assessment Tool* (Tool 3A) to track progress on your building blocks.

ACTION PLANNER B *Our foundation seeks to:*	Engage residents more deeply in addressing an issue or challenge that affects them.	
Resident Engagement Effort *In what initiative or issue area do we want to engage residents?*		
Residents *Who are the residents we want to engage in this effort?*		
Reasons *Describe the top two or three reasons we want to engage residents more deeply in this effort.*	1. 2. 3.	
Time Frame *Specify start and end dates for this Action Plan (one year or less).*		
Engagement Process *List:* ***In Column A:*** *The top two or three ways we will engage residents.* ***In Column B:*** *One or two indicators that we will monitor and measure to tell us whether or not our engagement process is on track.*	**A – Engagement Tactics** *These are the primary tactics we will use to engage residents. Be sure to specify the role residents will play in each.*	**B – Process Measures** *We will measure these indicators to track our progress on Column A.*
	1.	a. b.
	2.	a. b.
	3.	a. b.
Transformation and Impact *List:* ***In Column A:*** *The top most notable results we are going for in this effort.* ***In Column B:*** *One or two indicators that we will monitor and measure during this time period to tell us whether or not our resident engagement efforts are successful.*	**A – Desired Impact** *These results will be "true" if we succeed in engaging residents.* *Hint: Consider impact on residents, on the issue of community concern, on community foundation strategy, on community foundation resource development, and/or on relationships.*	**B – Impact Measures** *We will measure these indicators to track our progress on the results in Column A.* *Hint: Include both the indicator and amount and direction (increase, decrease, quality, presence) of "improvement" you are targeting.*
	1.	a. b.
	2.	a. b.
	3.	a. b.
	4.	a. b.
	5.	a. b.

ACTION PLANNER B continued…

Our Resident Engagement Hypothesis: *If we do (x), then we will see (y) results…*	

Key Action Steps

What will we do to produce the desired results?

Specify up to three Key Action Steps we will take to engage residents more deeply in a community issue.

Then detail specific substeps and the lead people, partners or groups responsible for each, along with interim deadlines.

Key Action Step 1:

Substep	Lead Responsible	Deadline

Key Action Step 2:

Substep	Lead Responsible	Deadline

Key Action Step 3:

Substep	Lead Responsible	Deadline

Tracking

Tracking indicators and measures related to our desired results is always part of our action plan.

List here who and how we will do that for each measure we detailed above.

Indicator and Measure	Who will track it? How?	Tracking Report(s) Due:

Next Steps

- Use the *Resident Engagement Check-Up* (Tool 3D) to assess your resident engagement efforts and determine how to strengthen your approach in the future.

Tool 3D • Resident Engagement Check-Up

Purpose:

The Resident Engagement Check-Up is designed to help program staff and others involved in your resident engagement efforts evaluate those efforts and consider ways to strengthen resident engagement in the future. *Note: This tool is most helpful if used in conjunction with Designing for Impact (Tool 3B) and the Resident Engagement Action Planner (Tool 3C).*

Objectives

This tool helps program staff:

- Consider the ways in which the community foundation and/or its partners engaged residents in addressing a community challenge, the roles residents played, and the extent to which they continued to engage afterward.
- Explore the effort's impact—in terms of the effect it had on residents on an issue of community concern and on the community foundation.
- Examine what worked and what you could do differently in order to engage residents more effectively in the future.

Materials Needed:

- Resident Engagement Check-up found on pages 43 and 44
- Your completed Designing for Impact template, if you used that tool, found on page 35
- Any notes from previous sessions that would be helpful *(on-screen, printed or sent in advance)*
- Flip chart
- Markers
- Post-its

Gather

Assemble a team including staff, board members, and/or key partners – in person, on the phone, or in an electronic meeting. *Ideally, the check-up process should include residents who were/are involved in the effort. They offer a firsthand perspective of what occurred and may have helpful ideas for what to do differently in the future.*

Identify

Decide which resident engagement effort you would like to evaluate or track. *If you completed the Designing for Impact Template before your resident engagement effort you may want to refer back to it here.*

Complete

Work with your group to complete the Resident Engagement Check-Up on the next page. Be sure to discuss responses for each item in the template: Why did you respond the way you did? *It may be helpful to have individuals or pairs fill in the template on their own first before discussing the template as a full group. This may bring out perspectives or ideas that would otherwise not be shared.*

Repeat as needed

You do not need to wait until an initiative has ended to complete the Resident Engagement Check-Up. In fact, it's better if you use it at regular intervals throughout an initiative to check in on your efforts and redirect activities as needed.

Resident Engagement Check-Up

Our Resident Engagement Effort	
Who were the residents involved in this effort?	
Our Resident Engagement Hypothesis	*If… then…*

Use the questions below to help think about and analyze your resident engagement PROCESS.

What Resident Engagement approach(es) or tactic(s) were used?	**What was/were the role(s) of the residents?** (Circle all that apply.)					
	Listener/ Reader	*Responder*	*Idea generator*	*Advisor*	*Organizer/ Leader*	*Decider*
	Listener/ Reader	*Responder*	*Idea generator*	*Advisor*	*Organizer/ Leader*	*Decider*
	Listener/ Reader	*Responder*	*Idea generator*	*Advisor*	*Organizer/ Leader*	*Decider*

Participation	*Did this effort increase the number of residents engaged, compared to other initiatives?*	**No Increase**	**Minimal Increase**	**Fair increase**	**Good Increase**	**Large Increase**
	How?					
	To what extent did the effort engage hard-to-reach residents?	**Did not reach**		**Some reach**		**Significant reach**
	How?					
Motivation	*To what extent were residents able to "see" their self-interest (i.e., that engaging in the process was to their own benefit)?*	**Little or none**		**Some**		**Significant**
	Specify by tactic or approach if useful					

Use the questions below to help analyze the **TRANSFORMATIONS** that occurred as a result of your resident engagement effort.					
	Residents	*The Issue of Community Concern*	*Community Foundation Strategy*	*Community Foundation Resources*	*Relationships*
What was the impact of this engagement effort on…					
As measured/indicated by…					
Did this engagement effort produce the intended impact or results? Why or why not?					
Were there any unintended impacts, either positive or negative?					
How – or did – residents continue to engage afterward?					

Additional Discussion Questions	
What went well about this particular resident engagement effort? ***(This could be related to one of the responses on the Check-Up or something different.)***	**What would we do differently next time?**
How are we – or how will we – continue to engage residents in this particular issue and/or other issues in the future?	**What would it *take* for us to do things differently next time? In other words, what skills and capacities do we need to strengthen in order to be more successful in the future?** ***It may be helpful to refer back to the building blocks here.***

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