

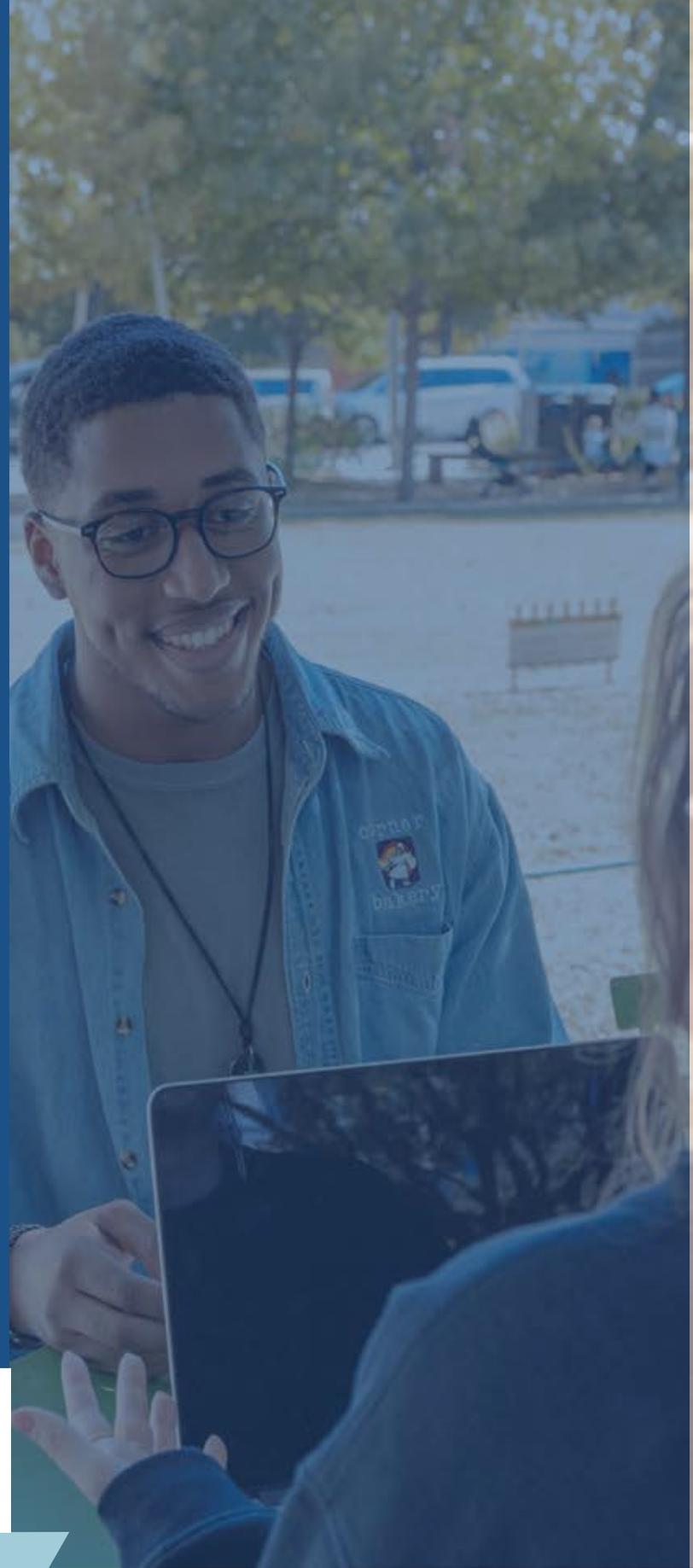


# ENGAGE THE COMMUNITY

## A Guide for Developing a Community Engagement Plan

September 2022

*Project Implementation Toolkit  
Guide 3 of 5*



Engage the Community

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# WHAT IS CMO?



The Clean Mobility Options Voucher Pilot Program (CMO) is part of the [California Climate Investments \(CCI\)](#), a statewide initiative that puts billions of Cap-and-Trade dollars towards reducing greenhouse gas emissions, strengthening the economy, and improving public health and the environment — particularly in disadvantaged communities.

CMO provides voucher-based funding for zero-emission carsharing, carpooling/vanpooling, bikesharing/scooter-sharing, innovative transit services, and ride-on-demand services in California's historically underserved communities. CMO also aims to improve underserved communities' access to clean mobility options and seeks to further mobility equity.



*Fresno Metro Ministry demos the Arcimoto FUV at Manchester Center during a shared mobility event. This event was part of the Fresno Metro Ministry Southern Blackstone Transportation Needs Assessment Project.*

This program is co-funded by the California Energy Commission's Clean Transportation Program, which is investing more than \$1 billion to accelerate the deployment of zero-emission transportation infrastructure and support in-state manufacturing and workforce training and development.

# WHAT IS THE PROJECT IMPLEMENTATION TOOLKIT?

The Project Implementation Toolkit is a suite of five guides designed to help each of the awardees implement their mobility project well. Each Guide in the Toolkit has been designed as a stand-alone resource with tips and worksheets.



## Guide 1: Calculate Costs

This guide includes information about budgeting throughout the Planning & Construction Phase and the Operation Phase of your mobility project. Special considerations and notes are included for bikeshare, carshare, carpool/vanpool, innovative transit services, and ride on demand.



## Guide 2: Hire Locally

This guide includes information about hiring positions, budgeting, and strategies to create a team for your mobility project.



## Guide 3: Engage the Community

This guide includes information about fostering project identity, addressing institutional inequalities, building capacity with residents, creating community buy-in, and developing sustainable ridership.



## Guide 4: Finalize Contracts & Procurements

This guide includes information about procuring new mobility service operators, construction and maintenance services, project management services, or any other necessary contractors.



## Guide 5: Plan the Site

This guide includes information to help you in planning the location of zero-emission vehicle or micromobility options stations and charging infrastructure, navigate the municipal permitting processes, check insurance requirements, and establish partnerships.

# ABOUT THIS GUIDE

In your application, you submitted a Community Outreach Plan that summarized your outreach efforts and activities to engage community residents as you prepare for the launch of your project and throughout the project's operations.

This guide helps you expand upon your plan so that you can bring the community into decision making around things like project siting, pricing, a launch event, and other project milestones. This guide also provides guidance for fostering project identity, addressing institutional inequalities, building capacity with residents, creating community buy-in, and developing sustainable ridership. That trust is imperative to making your program successful.



## TIP!

### *NEED MORE GUIDANCE TO ENGAGE THE COMMUNITY?*

For any questions or for further guidance, CMO awardees are encouraged to contact their Cohort Facilitator.

For prospective CMO applicants, please contact the CMO Administrator Team to receive one-on-one technical assistance.

 CMO Hotline: 626-744-5670  
Monday - Friday : 9AM - 5PM PST

 [info@cleanmobilityoptions.org](mailto:info@cleanmobilityoptions.org)

 [www.cleanmobilityoptions.org](http://www.cleanmobilityoptions.org)

# SET COMMUNITY ENGAGEMENT GOALS

## *Refine Community Outreach Plan and Project Milestone Schedule*

At the time of application, you submitted a Community Outreach Plan to show how community engagement would inform your project, and a Project Milestone Schedule, to lay out a timeline for your project's major achievements. Holding these up together and pairing engagement strategies with your milestones will help you set goals for community engagement.

Review your Community Outreach Plan from your application. You might have goals identified or need to tease them out. Here are some steps to help refine your goals, center them around community decision making, and tie them to your project's timeline.

## *Establish an Engagement Timeline*

Looking at the milestone schedule and community outreach plan, identify major milestones for and where there are opportunities for synergy to engage and include the community. Ensure there is sufficient time to plan and prepare for the engagement, build relationships and trust, and incorporate community in a meaningful way.

### *Key Milestones to build your engagement timeline around:*

**Project Kickoff** - before service begins, it's not too early to bring in the community, establish relationships, and start building buzz.

**Planning Phase** - A crucial opportunity to build trust, create community buy-in, and leadership.

**Construction Phase** - If installing charging stations, docks for bikes, or even using a public parking space for a shared vehicle, it's vital to let the community know what to expect, and get feedback. Critical here too is anticipating any political pushback and using engagement to get ahead of it.

**Project Launch** - This is a chance to celebrate the project with the community that helped bring it to life.

**Operations Period** - Engagement doesn't stop when the service starts. Keep engaging the community throughout the operations period to continually improve it to better meet the community's needs, and market the service to build sustainability beyond the grant period.

## Worksheet

### *Identify Target Participants*

An important step before determining how you engage the community is to establish who to involve in the process (e.g., who you want to inform, get feedback from, and lead specific project elements).

- Define what 'community' means to your project; describe the groups of people the mobility team aims to impact with the mobility project and bring in through engagement.
- Which priority populations or groups are you trying to ensure use the service?
- Which groups of people in your project area have been historically marginalized?
- Who is often excluded from engagement? Who is most impacted by projects? Are these the same groups? Different groups?
- Who often chooses not to participate in community engagement efforts in your project area?



After identifying these groups, think about what that history will mean when trying to involve them. It may not be as simple as inviting them to a meeting. For more about building trust, see “Establish Context and Principles of Community Engagement” below

**TIP!**

## Write Out Engagement Goals

What are you hoping will happen because of this engagement process?  
How do you want community engagement to impact your project?

After thinking about the above, you could write out goals like this:

“We want \_\_\_\_\_ (target audience) to \_\_\_\_\_ (role/action) during \_\_\_\_\_ (project phase or activity).”

Examples:

“We want **Spanish-speaking seniors** to **identify key drop-off locations** during the **planning phase of the service.**”

“We want **local businesses** to **learn that on-street parking is being removed for service** during the **construction phase.**”

“We want **students** to **use the service** during the **operations phase.**”

“We want **six representative residents** to **lead 10 house visits** to collect feedback during **the entire project period.**”



For help identifying roles and levels of participation for community members in your engagement process, see the [IAP2 Spectrum of Participation](#).

**TIP!**

# REVISIT COMMUNITY CONTEXT AND PRINCIPLES FOR ENGAGEMENT

## *Review and Build on Previous Efforts*

Project teams conducted robust outreach and engagement efforts during the Community Transportation Needs Assessment, which was required for the Mobility Project Voucher (MPV) Application. Along with that, there may have been more transportation planning efforts or outreach in the project area that should be reviewed for more context. Further community engagement throughout the MPV project period should build and improve on these past processes. The focus of this engagement is much smaller as well and will present different users and feedback than previous efforts. Project teams know their communities best, but engagement must continue to facilitate a community-led project.

- Screen for community triggers and community trauma around planning, mobility, and displacement.
- Research what community engagement work has already been done.
- Closely review and understand findings from the “Needs Assessment.”
- Move at the speed of trust. For example, rather than wanting to engage residents first, a great step is to think about how you can be a source of knowledge and service.
- Work with key stakeholders in the area to understand the best paths forward for community engagement.



**TIP!**

It's always good to show your face, and a great opportunity to start doing this is while you are learning about community context. Attending meetings and saying nothing will get you recognized as someone ready to listen, and not purely to extract from the community.

## *Establish Principles for Your Community Engagement*

Develop guiding principles to help the Mobility Project Team stay rooted in how the mobility project is connected to the community. Here are some basic core tenets to keep in mind when conducting community engagement:

- Clarity:** Clear communication about the purpose of the community engagement, the project, and the community's role in project planning and implementation.
- Accessibility:** Accessible times and locations of events, meetings, and gatherings (e.g. virtual engagement when possible, evening meetings, meeting locations close to transit, neutral meeting locations) and accessible materials (e.g., language and ADA accessibility).
- Representation:** Activities that reach a broad and representative subset of the whole community, including hard-to-reach residents that are not typically served well by existing public feedback processes.
- Transparency:** Consistent, clear, and easily available information about community engagement activities, including notices before they happen and follow-up after they happen

# PLAN FOR REQUIRED SURVEYS

## *Develop Goals and Strategies for Survey Collection*

The CMO Voucher Pilot Program requires that awardees collect information from community members participating in engagement activities and from those using the services. Some questions are required for each survey category, but there are also opportunities to modify, add, or subtract optional questions to get the information needed to improve the project. There should also be a timeline and goals set for these surveys that you can work with the Program Administrator to develop.

- **Intake/Sign-Up Surveys (Required)** - Deployed either during planning and construction phase or beginning at Operations Launch as residents begin to use the services.
- **Post Trip Surveys (Required)** - After a designated intake period, post-trip surveys will be deployed to capture travel activities and service feedback and satisfaction throughout the Operations Period.
- **User Surveys (Required)** - Beginning at least 1 year from Operations Launch and 6 months before the end of the Voucher Agreement Term a user survey will be deployed to capture behavior change and service feedback and satisfaction.
- **Community Engagement Surveys (Recommended)** - During or after community engagement activities, Awardees are encouraged to request feedback from attendees, however all the required questions are included in the intake/sign-up surveys and/or annual user surveys throughout the Voucher Agreement Term.



### **TIP!**

For more tips on survey design and deployment, see the

[Community Transportation Needs Assessment Survey Guide.](#)

# CHOOSE ENGAGEMENT ACTIVITIES

## Worksheet

### *Pick the Right Activity to Meet Project/Community Goals*

Reviewing your milestones, context, and core principles for community engagement, **identify the specific community engagement events that best support the goals and attract the intended audience to participate. Below are some activities.** For more examples, please see the [Community Transportation Needs Assessment Engagement Guide Appendix](#).

- Steering/Planning Committees:** A steering/planning committee is made up of a group of individuals or organizations who help guide the project and planning by using their expertise within certain aspects of the project.
- Resident Committees:** Create a resident-based committee with target populations, youth, seniors, and more. The committee can be empowered to lead further community engagement activities and given decision-making authority.
- One-on-One Discussion:** One-on-one discussions are similar to interviews where you discuss with one or two individuals to get insider knowledge or expertise on a topic or field. These can occur with industry experts, residents in the project area, and more. These conversations can be extremely helpful at the beginning of your project when you are working to build relationships.
- Focus Groups:** Group interviews or discussions involving a limited number of people to receive opinions and impressions on a specific topic.

-  **Town Halls** Meetings that are generally held in a public or governmental space to review specific topics with members of the community and record their opinions.
-  **Interactive Workshops** Events where community members have a specific list of questions or hands-on activities to explore specific topics and offer reactions and/or potential solutions.
-  **Open Houses** Invitation to a public event where people can view and interact with a specific place, concept, or new technology.
-  **Roundtables** Roundtables invite key stakeholders from the community to discuss a set of guiding questions related to project implementation. Roundtables usually feature a facilitator, a clear outcome of the discussion, and allow for knowledge sharing.
-  **Local Partners & CBOs** Coordinate with local partners or community-based organizations to share information and surveys with their group members through email newsletters, social media, and announcements at their events/activities. Consider paying CBOs to help with the engagement.
-  **School & PTA Meetings** Connect with local schools and Parent-Teacher Associations (PTAs) and become a regular at their meetings. Ask to present items or facilitate discussions around the needs of your project.
-  **Pop-Up Shops** Opening a short-term space for an event or series of limited events to sell or showcase new items or concepts.
-  **Web-Based Engagement** Engage with the community online through websites, email or social media to keep them informed about news, events or products.
-  **Mobility Launch** The start of a service or set that includes carsharing, bike sharing, mobility hubs and/or data platforms.
-  **Safety Courses** A class or series of classes to teach best practices for safe use of specific equipment or services. These could include in-person, online or video training.

## Key Considerations for Engagement Activities

Consider the following questions when considering community engagement events:

**Where:** Where will the community engagement activity or event be held? Is it accessible to the individuals or groups that should be there?

**When:** What date and time will the event be held? How long will the event last? Is this a good time for target populations or groups?

**Who:** What level of staffing or volunteer support is needed?

**Outreach:** How will the engagement activities be advertised and shared with audiences?

**Materials:** What material or equipment is needed to ensure a successful event?



*What additional community engagement components will be provided to make it more inclusive?*

Consider cultural relevance, language, virtual options, health and safety measures (i.e., COVID-19), etc. See the [Community Engagement Guide](#)

**TIP!**

[Appendix](#) for more in-depth information on these additional components.

### **Be Flexible, Prepare for Different Communication Styles**

Develop multiple strategies, alternatives, and ideas for engagement. Sometimes an idea or approach won't provide the results that were anticipated, and you will need to shift your strategy altogether. Rather than waiting for that moment to come, plan for different forms of engagement upfront.

Some residents may prefer to engage verbally, with written text, or tactile exercises. Further, some residents may prefer quick and direct answers, while others like answers with tons of context. In any case, it's always best to ask if the community has further questions or would like to approach something differently.

### **Provide Different Types of Incentives**

Consider using raffles, gift incentives, prizes, and other creative incentives to get residents to participate and provide input during events. Awardees should note that CMO cannot directly pay for food or childcare expenses.

### **Use Digital and Analog Outreach**

One community may prefer to use online surveys, while another may find paper surveys more suitable. Making sure you include an array of options for engagement, including digital and analog outreach opportunities, will include residents with limited-technology capabilities and can help bolster engagement responses.

### **Understand When It Is A Good Time To Reach Out To Residents**

Talk to place-based organizations, review your needs assessment results, and generally get a feel for when your community prefers to engage, such as weekends, evenings, or during regular business hours.

### **Host Engagement Efforts In Centrally-Located Destinations**

Host events that are readily accessible by transit, familiar to residents, and generally ADA accessible. Even if there are more lucrative and luring areas to host an event, residents may not feel compelled to attend if they are not centrally located or easy to find.



#### **TIP!**

*Inclusive ADA event resource: University of Kansas' [Best Practices for Planning an Accessible Event](#).*

**Meet People Where They Are**

Some residents will be somewhere at a specific time - leverage those opportunity moments for engagement. These events could include laundromats, food carts, post-church community events, school events and meetings, park visits, and more.

**Leverage Existing Events**

Rather than creating a new event, join an existing event like a community fair, a church event, council meeting, farmers market, and more. Coordinating with existing events will avoid organizing a new event, engage people that wouldn't otherwise attend your event, and allow you to be part of the community.

## Creating Content

When designing content for community members, such as flyers for events, social media posts, or informative brochures, it's important to make the document accessible, enjoyable, and representative of the community. Here are some tips to ensure that documents, social media posts, flyers, and more are created in an inclusive way.

**Don't Assume**

Be sure to include descriptions, benefits, and images of mobility options and reference any projects in the community.

**Language**

Produce content and documents in all major languages spoken in the community and avoid jargon and acronyms to make language explicit and direct. Include images, photos, or icons to help convey a message or tell a story.

**Cultural Relevance**

Consult with local community groups, leaders, and champions, including youth and local artists, for culturally relevant ideas that will resonate with the community and gain traction. Conversely, discuss what cultural sensitivities need to be kept in mind when creating content so as not to surface any community traumas.

### **Americans with Disabilities Act Accessible**

Ensure material and documents are ADA accessible and are available in multiple formats and languages using both digital and analog formats per the community's needs/preferences.

### **Informed Consent/Data Transparency**

Be transparent about how participants' data or responses will be used or protected.

# MEASURE PROJECT SUCCESS

## *Build Evaluation into your Engagement Timeline*

Over your project period, an easy place to start evaluating is to go back to your community engagement goals and see if you were able to meet them fully or in part. With that in mind, how often will you check back on these goals and recalibrate if necessary? Who will you incorporate in this evaluation? Remember your post-event surveys!

### *Worksheet*

## *Questions for Evaluating Engagement*

Here are some more questions to consider asking throughout the engagement process and after activities:

### *Evaluating Community **Reach***

- Did our target audience participate in this engagement?
- Were they actively participating in the engagement, giving feedback? Or were they passively listening or watching?

### Evaluating Community **Access**

- Were participants' language, literacy, age, and culture taken into consideration with the process design?
- If a facilitator was used, did they provide a safe and well managed environment?

### Evaluating Community **Capacity Building**

- Did the public engagement process provide residents with additional skills, knowledge, and experiences likely to encourage their role as committed and effective community members?
- Was background information provided so participants were prepared?
- Did the process result in the agency making a more informed and/or better decision?
- How might your agency continue to draw on and develop these community capacities?

### Evaluating Community-led **Decision Making**

- Did the agency consider the ideas resulting from public process in final decisions?
- Did the process result in the agency making a more informed and/or better decision?

## Evaluating **Transparency**

- What happened to the input gathered?
- Have participants been given the opportunity to add their names to appropriate mailing lists/listservs for future engagement opportunities?
- Was the process appropriate for the degree of specificity you were seeking?
- Were materials used in the process helpful?
- Did the agency provide feedback to participants about how their recommendations were or were not used and why?
- Was there an effective external communications effort to the larger public during, or at the conclusion of, the engagement effort about the intent of the process, or its outcomes?

## Evaluating **Effectiveness**

- Were you satisfied with the internal communication among staff within your organization, project partners, and (any) consultants during the engagement process?
- Was there greater support for the (resulting) new policy or action?
- Did the community say they would be more or less likely to participate in other such processes in the future?

Remember your post-event surveys as well. These are vital to the evaluation. Remember to be flexible! Listen to the community and show that you are learning from them and incorporating their feedback. This will also build trust and buy-in to your process and improve your service.

# NEXT STEPS: MOVE TO THE NEXT GUIDE

Thank you for using the Engage The Community guide. We hope it helps you engage with your community throughout your mobility project. Feel free to repurpose, change, or modify any of these activities to best support you with engagement.



## Additional Support

For any questions or for further guidance, please contact your Technical Assistance Leader.



CMO Hotline:  
626-744-5670  
M-F | 9AM- 5PM PST



[info@cleanmobilityoptions.org](mailto:info@cleanmobilityoptions.org)



[www.cleanmobilityoptions.org](http://www.cleanmobilityoptions.org)