

ITAViP Toolkit: Community Engagement

Community Engagement

This section of the toolkit is focused on activities that will help you with *planning* how to establish, stabilize, and evolve sustainable community engagement for your program. It is designed to help you structure discussions and gain consensus about next steps for sustainable community engagement for your OSS program. It is not a toolkit for day to day community engagement.



Definition: The Community Engagement facet reflects efforts to facilitate and foster involvement within a community. It is focused on encouraging users to become stakeholders. Those who have a sense of investment and ownership become champions who want the program to grow and succeed. A component of this facet also includes communication and outreach efforts to the community itself as well as the wider world of decision makers, potential users, funding agencies, and others.

Instructions

Brand new to *It Takes a Village in Practice*? Review the activities and goals below to select ones you want to use for sustainability planning.

These activities are designed to help you move from one phase to the next and can be used in any order. You can use any or all of them. [Suggested persona pathways](#) are outlined at bottom of page, but it is not expected that programs would do all activities. As you use them, we are eager for feedback via ITAV@lyrasis.org

Some beta testers have kindly provided samples of their work with activities. They are included below as available.

Pre-Work			
These are activities that may be helpful if you haven't already done strategic planning.			
A. Mission / Vision	Goal: To enable program governance to consider and create a Mission and Vision Statement if you do not already have one. Having a Mission and Vision Statement are helpful for many of the ITAV activities. Examples: Mission Vision	P	DF

Phase 1: Getting Beyond Initial Stakeholders			
Phase 1 Objectives include: Involve a Wider Group of Stakeholders; Create an Outreach Committee; and Formulate and Implement a Communication and Engagement Strategy			
1. Who is Your Community?	Goals: Identify community stakeholders; Consider goals for each stakeholder group; Prioritize community stakeholders Examples: stakeholders (list); stakeholders (visual) Related Objectives: Involve a Wider Group of Stakeholders; Formulate and Implement a Communication and Engagement Strategy	DOC	PDF
2. Create Personas	Goals: Create explicit personas for community stakeholders; Enable checking future plans against persona goals Related Objectives: Involve a Wider Group of Stakeholders; Formulate and Implement a Communication and Engagement Strategy	DOC	PDF

3. Plan an Outreach Committee	Goals: Create goals, identify gaps, determine timeline, and create mission/vision for Committee Related Objectives: Create an Outreach Committee	DOC	PDF
4. Create Outreach Committee Charter	Goal: Create charter to clarify roles and purpose Related Objectives: Create an Outreach Committee	DOC	PDF
5. Stakeholder and Engagement Matching Tool	Goals: Understand the communication needs and preferences of stakeholders; Match stakeholders to engagement tools Example: brainstorming Related Objectives: Involve a Wider Group of Stakeholders; Formulate and Implement a Communication and Engagement Strategy	DOC	PDF
6. Create Communication and Engagement Plan	Goals: Understand plan components; Fill out and share plan Related Objectives: Formulate and Implement a Communication and Engagement Strategy	DOC Template Sample	PDF Sample
7. Evaluate Communication & Engagement Plan	Goals: Evaluate implementation; Determine gaps and identify how to improve Related Objectives: Formulate and Implement a Communication and Engagement Strategy	DOC	PDF

Phase 2: Establishing Community Engagement Infrastructure			
Phase 2 Objectives include: Set Up Processes and Infrastructure to Facilitate Engagement; Clear Communication Practices and Policies; Increase Non-Directed Community Activities; Increase Transparency; Engage a More Diverse Set of Engaged Participants; and Engage with New Communities			
8. Determine New Forms of Community Engagement	Goals: Determine what kind of engagement is right for your community; Map stakeholder groups to activities you want to support Related Objectives: Set Up Processes and Infrastructure to Facilitate Engagement	D OC	P DF
9. Identify Infrastructure for Community Engagement Activities	Goal: Identify the processes and infrastructure you need for engagement. Related Objectives: Set Up Processes and Infrastructure to Facilitate Engagement	D OC	P DF
10. Assess Non Technical Documentation	Goal: Assess the non-technical documentation for clarity and usefulness Related Objectives: Clear Communication Practices and Policies; Increase Transparency	D OC	P DF
11. Consider Branding and Consistency Issues	Goal: Ensure your community finds accurate and consistent information across platforms Related Objectives: Clear Communication Practices and Policies	D OC	P DF
12. Increase Program Transparency	Goals: Understand the current level of transparency; Determine transparency goals Related Objectives: Increase Transparency	D OC	P DF
13. Value Proposition for Position Descriptions	Goal: Create value propositions for new program positions Related Objectives: Dedicated Staffing	D OC	P DF
14. Empower Community Activities	Goals: Increase active representatives; Encourage non-directed community activities Related Objectives: Set Up Processes and Infrastructure to Facilitate Engagement; Increase Non-Directed Community Activities	D OC	P DF
15. We Can, IF...	Goal: Help identify barriers and spark creative solutions Example: Activity snippet Related Objectives: Set Up Processes and Infrastructure to Facilitate Engagement	D OC	P DF
16. Identify Skills Gaps - Speedboat	Goals: Identify skill gaps; Better understand barriers for participation Related Objectives: Engage a More Diverse Set of Engaged Participants; Engage with New Communities	D OC	P DF
17. Increase Cultural Sensitivity	Goals: Consider the context and cultural norms; Consider how to adjust engagement to better fit other needs Related Objectives: Engage a More Diverse Set of Engaged Participants; Engage with New Communities	D OC	P DF
18. Identify Stakeholder Gaps	Goals: Identify gaps in community stakeholders; Improve understanding of barriers Related Objectives: Engage a More Diverse Set of Engaged Participants; Engage with New Communities	D OC	P DF

19. Engage with New Communities - Nodes	Goal: Identify key influencers in new communities Related Objectives: Engage a More Diverse Set of Engaged Participants; Engage with New Communities	D OC	P DF
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Phase 3: Assessing and Evolving Community Engagement

Phase 3 Objectives include Work Across Communities; Empower the Community Supporting Each Other; and Establish Ways to Continually Evaluate Community Engagement

20. Reassess Engagement Activities	Goals: Identify activities that need to evolve or be retired; Developing a plan and communicate changes. Related Objectives: Work Across Communities; Empower the Community Supporting Each Other; Establish Ways to Continually Evaluate Community Engagement	D OC	P DF
21. Context Mapping for future Community Engagement	Goals: Consider landscape for community engagement; Anticipate future needs Related Objectives: Empower the Community Supporting Each Other	D OC	P DF
22. Review and Expand Infrastructure	Goal: Revisit infrastructure to evaluate how it can support non directed community activities Related Objectives: Establish Ways to Continually Evaluate Community Engagement	D OC	P DF

Suggested Pathways

You can use any of the activities in any order but we have designed some suggested pathways based on a few personas:

- **Opportunity for change:** The community has been building community for a while but you are looking to re-evaluate current styles and forms of engagement and what is necessary to engage new community participants. [8](#), [14](#), [17](#), and [18](#)
- **Starter Kit:** You want to dip your toe into community engagement. Start with [1](#) and [15](#)
- **Unstructured:** You want to find a quick ways to have less structured activities that can lead to practical next steps: [15](#)