

# GET YOURSELF STARTED

Are you starting an engagement process? Follow these steps to help keep on track.

## 1. Define Your Project Goals for Engagement

Each project will have a unique set of goals and expectations for how engagement will influence the final design or plan. Write out those goals and understand how they influence the type of tools you will need to have a successful process.

*Are you just seeking to inform the community about what you are doing, or invite them into a collaborative, co-authorship process? Write down a few sentences that describe what you hope to achieve through engagement. See the decision-making tree on the follow pages for inspiration.*

We are informing them about...

We are listening about...

We are involving them in...

We are collaborating on...

## 2. Identify Key Participants

Create a list of all of the groups of residents, target demographics, local organizations, and leaders the project will need to engage with.

*Be specific! For example, include names of service groups or civic organizations like Rotary and Lions Club. Even if you do not know who the point of contact will be at each group, listening them will help you remember to reach out.*

*Same for the target demographics - knowing seniors, young families, and renters are important stakeholders will help keep track of who you have and haven't reached throughout the process.*

### 3. Set a Project Budget and Schedule

Outline what your engagement budget and how frequently you plan to engage community members so you can get an idea of how far the budget must go to achieve your project goals.

*Include any key municipality deadlines or legal requirements, like public review periods and council approvals, in the schedule so you understand the potential limitations or conflicts this creates. It is imperative that you understand key project milestones and how engagement will influence the timing and budget of achieving those milestones.*

### 4. Pick Your Engagement Tools

Using the responses from above, you can now determine the tools that best fits your project needs. See the Tools and Strategies Guide on the following pages.

<b>GOAL</b> <i>List what you hope to accomplish</i>	<b>WHO</b> <i>Who are you trying to reach?</i>	<b>TOOL</b> <i>What will you ask them and how?</i>	<b>PROMOTION</b> <i>How will you let them know this is happening?</i>	<b>LOGISTICS</b> <i>What is the date, time, and meeting space of the event (if applicable)?</i>	<b>MATERIALS</b> <i>What will you need to do this activity?</i>