



ReThink
Health[®]

A RIPPEL INITIATIVE

for developing A Resident Engagement Strategy A Planning Curriculum

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Developing a Resident Engagement Strategy

A Planning Curriculum

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Introduction

Why should people like you and your colleagues, who are stewards working to transform the health and well-being of their regions through multisector partnerships and organizations, care about the quality of their resident engagement efforts? First, sustained resident engagement can result in more effective and equitable health policies and practices—and increase residents’ support for them. Second, engagement—especially when sustained over time—strengthens the regional networks that have direct, positive effects on residents’ physical and mental health.

Third, sustained resident engagement builds relationships between people, organizations, and sectors so that they can understand and support one another better. Ensuring active resident engagement and leadership—in which residents have a respected voice and real power in decision-making—is essential to creating the kind of effective cross-sector collaboration that can transform regional health. This planning curriculum is designed to help you think through your resident engagement strategy.

“Residents” are those who live and work in the community and are not professionally involved in transforming health and well-being.

This tool will help you:

- Create an inventory of existing resident engagement efforts and sort them into outcomes-based categories
- Identify gaps between your resident engagement goals and your engagement practices
- Build a shared understanding of resident engagement across your team
- Identify and employ assets to build stronger, more sustained resident engagement
- Predict challenges to watch out for when planning an engagement effort

This tool contains:

- Three, two-hour meeting agendas that guide a facilitator to lead a group through development of a resident engagement strategy
- Recorded video presentations that explain basic concepts and give groups guidance on how to do the exercises

How to use this tool

Before you start, decide who should be involved in the meetings. If you are part of a multisector partnership, at the very least, you should include the leadership team. In addition, you might include other people from your partnership based on their interest and potential for contribution—and if you're not part of a partnership, include multiple people from your organization, based on that same criteria. To ensure meaningful participation, the meetings should not exceed 10-12 people and should be led by a dedicated facilitator.

Groups should meet at least three times, but you are free to amend the exercises to best fit your actual work pace, needs, and availability. For example, you could combine the first two meetings and watch the video-recorded presentations individually beforehand. Look at the resources here as a framework for the process, not a precise prescription.

Finally, ask someone to take notes or record the meetings so that you can refer back to the conversations and the ideas generated.

MEETING 1

What is resident engagement and why does it matter?

Time Required: 2 hours

Intended Outcomes

- An inventory of existing resident engagement efforts, sorted into outcomes-based categories
- Clarity around the types of resident engagement
- Understand why successful leaders and organizations engage residents and what engagement can accomplish

Supplies

- Flip charts
- Sticky dots in purple, blue, red, yellow, and green
- Post-it notes
- Projector with screen and sound
- Appendix 1 (see page 10; as many copies as you need based on the number of initiatives you anticipate)
- Appendix 2: Resident Engagement Practices Typology (see page 11-13; one copy per participant)

Meeting Preparation

Before the meeting, create a list of regional initiatives—those your members of your group lead or take part in—that are focused on health and well-being and are trying in some way to provide opportunities for residents to engage (see Appendix 1 on page 9). Write down the initiatives' purposes, target populations, and their major activities. Assemble these details and distribute to meeting attendees so they can familiarize themselves with the initiatives (if they don't know them already). Ask them to submit similar information for additional initiatives they would like to see on the list and amend the list before the meeting.

Write the names of the identified initiatives on flip charts so that there is space for people to attach dots or post-its under each entry. Set up the flip charts ahead of time to ensure your time together is well spent.

Ask meeting participants to pair up. If the group is newly formed, if there are new members, or if people in the group do not know each other well, ask attendees to pair up with someone they haven't talked with before.

MEETING 1 AGENDA | What is resident engagement and why does it matter?

TIME	AGENDA ITEM
00:00 – 00:15	<p>Introduction/Opening</p> <ul style="list-style-type: none"> • Welcome • Set the intentions for the meeting • Review the agenda <p>Review the list of initiatives prepared before the meeting and think about other initiatives you may know about (including initiatives on other issues or in other communities).</p> <p>Discussion in pairs:</p> <ul style="list-style-type: none"> • What does resident engagement really mean? How do you think resident engagement should be defined? • Why would resident engagement be helpful for achieving the shared vision for the region?
00:15 – 00:35	<p>Watch video:</p> <p>What is resident engagement and how is it changing?</p> 
00:35 – 00:45	<p>Discussion in pairs:</p> <ul style="list-style-type: none"> • What did you hear? What jumped out at you from the presentation? • How does it compare with your own experiences with resident engagement?
00:45 – 1:00	<p>Whole group discussion on the kinds of resident engagement happening in your region:</p> <ul style="list-style-type: none"> • Look at the initiatives on the flip charts. Based on what you heard in the video, are there other initiatives that should be added to the list? If so, please write them on a Post-it note (one per Post-it) and add them to a new flip chart. • What kinds of resident engagement are evident in these initiatives? Invite the team to vote using the dots: <ul style="list-style-type: none"> – Thick engagement: red dot – Thin engagement: yellow dot • Is the engagement happening in invited spaces for the most part? Is there also engagement in invented spaces? • If time allows, describe these invented spaces and how they affect experience and engagement. <p>Reminder:</p> <ul style="list-style-type: none"> • Thick Engagement: Informed, deliberative, emotional, full of choices for groups to make; example—Small-group discussions, listening campaigns • Thin Engagement: Fast, easy, full of choices for individuals to make; example—surveys, polls, petitions • Invited spaces—organized by organizations/institutions • Invented spaces—created/claimed by residents
1:00 – 1:15	<p>Watch video:</p> <p>Why engage residents? What can engagement accomplish?</p> 
<p>1:15 – 1:30</p> <p>See Tip on page 5</p>	<p>Whole group discussion on the outcomes you want to see from resident engagement:</p> <ul style="list-style-type: none"> • Look at the list of initiatives on the flip charts. Based on what you've heard today, which of the resident engagement outcomes (from the list of three below) are the listed initiatives trying to achieve? As you discuss, the meeting host should place a single sticky dot next to each initiative's name. The color of the assigned sticky dot should correspond to the outcome that initiative is trying to achieve as follows: <ul style="list-style-type: none"> – Awareness and participation: green dot – Feedback and input: purple dot – Active resident leadership (community activation): blue dot • Tally the total number of dots for each color

Meeting 1 Agenda continued

TIME	AGENDA ITEM
1:00 – 1:50 See Tip below	Whole group discussion <ul style="list-style-type: none">• What do the tallies from the last step reveal? Which of the potential outcomes of engagement are being pursued the most and least in your region? Is there an imbalance between three potential outcomes?• What needs to shift in your resident engagement strategy to balance your resident engagement portfolio? Can you actually make that shift? What are the limitations (e.g., state regulations, resources)?• OPTIONAL: What are the particular examples—local ones or ones featured in the videos—that seemed particularly compelling and relevant to your own planning?
1:50 – 2:00	Wrap-up and preparation for the next meeting <ul style="list-style-type: none">• Discuss logistics for the next meeting: when, where, how long?• Participants should think about other examples of resident engagement that have happened in the region over the last 10 years. These could include examples on any issue (including budgeting, planning and land use, public safety, K-12 education, race and diversity). Examples that participants think of as failures are welcome, in addition to those they think of as successful.

TIP

As you work through this part of the agenda you might find it helpful to use the Resident Engagement Practices Typology and accompanying exercise in Appendix 2, pp. 11-13.

MEETING 2

Taking stock of the health of resident engagement efforts

Time Required: 2 hours

Intended Outcomes

- Clarity on how the absence of sustained, strategic resident engagement affects communities
- Understand what sustained, strategic resident engagement looks like on the ground

Supplies

- Flip charts
- Notes from last meeting as a reference
- Projector with screen and sound
- Appendix 3 (for facilitator only, as an example)

Meeting Preparation

Ask two or three people to be prepared to briefly describe, in one minute or less, an example of a resident engagement process, event, or effort. It could be from one of the initiatives on the list generated for Meeting 1, an effort focused on some other issue, or something that has taken place in another region. The point of the exercise is simply to describe real-life situations, so group members can clarify their thinking about the definitions and benefits of engagement. The people offering examples don't need to know the details of their examples inside and out—the examples may be from personal experience or simply something observed from a distance or read about somewhere.

If new members will be joining the group or if there are participants who missed the previous meeting, ask them to view the Meeting 1 videos before this meeting.

Remember to designate a note taker or record the meeting.

MEETING 2 AGENDA | Taking stock of the health of resident engagement efforts

TIME	AGENDA ITEM
00:00 – 00:05	Introduction/Opening <ul style="list-style-type: none"> • Welcome • Set the intentions for the meeting • Review the agenda
00:05 – 00:15	Whole group discussion: <ul style="list-style-type: none"> • How do you define “community” for your work? (Is it a city? Metro region? Clusters of neighborhoods? Separate towns within a region? Something else?)
00:15 – 00:30	Watch video: How does the absence of sustained and strategic resident engagement affect communities? 
00:30 – 00:55	Discussion in pairs: <ul style="list-style-type: none"> • Are any of the problems described in the video evident in your community? • Are any of these problems relevant to the work of your multisector partnership or organization—either to what you’ve done so far or to what you plan to do in the future?
00:55 – 1:20	Whole group discussion and timeline exercise: <ul style="list-style-type: none"> • At the top of a blank flip chart page, draw a timeline with one-year increments marked (see Appendix 3). Ask participants to write in the names of resident engagement processes/events/efforts that have taken place in your community on any issue, including but not limited to those identified and discussed at the first meeting. Note: the timeline can go back as far as the group thinks is relevant and important. Those who prepared examples for this meeting should go first to model for the group. Examples should include processes the group thinks of as failures, those that seemed successful, and those that were a mix of both. • As a group discuss: <ul style="list-style-type: none"> – What jumps out at you from the timeline? – How have these examples been successful? What kinds of benefits have they produced? – How have these examples fallen short? What benefits did they fail to produce? Did they do damage in any way? – Can you think of situations in which the public should have been provided an opportunity to engage, but there was no real effort to do so? – What, if any, attempts were made to coordinate efforts? Was there a better way to coordinate to avoid duplication?
1:20 – 1:35	Watch video: What does sustained resident engagement look like on the ground? 
1:35 – 1:55	Discussion in pairs <ul style="list-style-type: none"> • Please name any examples of sustained resident engagement in your community. • Are there any ways in which sustained engagement would help you achieve your goals as a partnership or organization? • Looking back at the examples on the timeline, can you identify assets (successful examples) to build on? • Looking at the examples on the timeline, are there challenges you will have to overcome to achieve your goals? (These could include past incidents where engagement didn’t happen or was poorly done.)
1:55 – 2:00	Wrap-up and preparation for the next meeting <ul style="list-style-type: none"> • Discuss logistics for the next meeting: when, where, how long? • Discuss: What worked well about today’s meeting and what didn’t work as well? What might we want to change for next time?

MEETING 3

Setting goals for resident engagement

Time Required: 2 hours

Intended Outcomes

- Predict challenges to watch out for when planning resident engagement efforts
- Identify and employ assets to build stronger, sustained resident engagement
- Prioritize list of resident engagement goals

Supplies

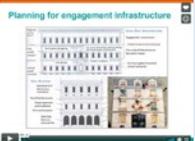
- Flip charts
- Notes from last meeting as a reference
- Post-it notes
- Projector with screen and sound

Meeting Preparation

If new members will be joining the group, or if there are participants who missed the previous meetings, ask them to view the videos and notes from previous meetings before this meeting. Ensure that everyone has copies of or is familiar with your shared vision for the region (or write this on a flip chart so that everyone can see it).

Designate a note taker or record the meeting.

MEETING 3 AGENDA | Setting goals for resident engagement

TIME	AGENDA ITEM
00:00 – 00:15	<p>Introduction/Opening</p> <ul style="list-style-type: none"> • Welcome • Set the intentions for the meeting • Review the agenda <p>Discussion in pairs (ask participants to work with someone they haven't been paired with during previous meetings)</p> <ul style="list-style-type: none"> • Reflect on the last meeting: What were your main takeaways? • Have any new ideas occurred to you since the last meeting? • What big questions do you have? (Capture these questions on a flip chart)
00:15 – 00:30	<p>Watch video:</p> <p><u>Typical challenges communities face when trying to plan for stronger resident engagement</u></p> 
00:30 – 00:55	<p>Discussion in pairs:</p> <ul style="list-style-type: none"> • Have you encountered any of the challenges described in the video? (If so, what did you do about them?) • Are there other key challenges you would add? • Which of these challenges seems most likely to complicate the work of your group? • Think about the composition of your group: Who is not at the table who needs to be? Can you think of other strategies to mitigate these challenges?
0:45 – 1:00	<p>Watch video:</p> <p><u>Assets for resident engagement</u></p> 
1:00 – 1:20	<p>Whole group discussion:</p> <p>Pass out Post-it notes and ask attendees to write down assets (one per note). The assets can be geographically specific (like a community center or library), or they can describe things that have no specific geographic location (like the local civic tech community).</p> <ul style="list-style-type: none"> • Which of the assets described in the video can be found in our community? • What other assets does our community possess?
1:20 – 1:30	<p>Discussion in pairs:</p> <ul style="list-style-type: none"> • Look at the shared vision for your region. Ask yourselves: If we succeed in achieving our vision, what will be different in our community? • Given what you know and have talked about in the last few weeks, how could resident engagement help achieve this vision?
1:30 – 1:55	<p>Whole group discussion:</p> <ul style="list-style-type: none"> • Brainstorm a list of specific resident engagement activities that you want to pursue in order to balance between three outcomes from Meeting 1. • Make a plan to distribute this information to members of your partnership or organization not heavily involved in resident engagement work to solicit feedback on and commitment to the specific goals.

Appendix 1

Print copies of this worksheet for all attendees at Meeting 1. List one initiative per row. Print as many sheets as you need to accommodate many initiatives (the number you'll need depends on the size of your partnership or organization, and region).

Institution/ Organization	Initiative Name	Purpose + Target Population	Major Activities (Choose all that apply)
			<input type="checkbox"/> Provide services and programs in the community <input type="checkbox"/> Incentivize behavior <input type="checkbox"/> Share information <input type="checkbox"/> Conduct surveys, interviews, and focus groups <input type="checkbox"/> Invite feedback via social media <input type="checkbox"/> Invite representation on advisory committees and governing boards <input type="checkbox"/> Host community/town hall meetings <input type="checkbox"/> Conduct listening campaigns <input type="checkbox"/> Organize public deliberation processes <input type="checkbox"/> Co-design services and programs <input type="checkbox"/> Provide grants for resident-driven initiatives <input type="checkbox"/> Open opportunities for shared decision making <input type="checkbox"/> Offer physical space for community gatherings <input type="checkbox"/> Hire and deploy community organizers <input type="checkbox"/> Open opportunities to build resident leadership capacity
			<input type="checkbox"/> Provide services and programs in the community <input type="checkbox"/> Incentivize behavior <input type="checkbox"/> Share information <input type="checkbox"/> Conduct surveys, interviews, and focus groups <input type="checkbox"/> Invite feedback via social media <input type="checkbox"/> Invite representation on advisory committees and governing boards <input type="checkbox"/> Host community/town hall meetings <input type="checkbox"/> Conduct listening campaigns <input type="checkbox"/> Organize public deliberation processes <input type="checkbox"/> Co-design services and programs <input type="checkbox"/> Provide grants for resident-driven initiatives <input type="checkbox"/> Open opportunities for shared decision making <input type="checkbox"/> Offer physical space for community gatherings <input type="checkbox"/> Hire and deploy community organizers <input type="checkbox"/> Open opportunities to build resident leadership capacity

Appendix 2 Resident Engagement Practices Typology

Outcomes	Practices	Description
Resident Awareness and Participation 	Provide services and programs in the community	Provide services and programs to residents in the community (e.g., cooking classes, farmers' markets, mobile vans, etc.)
	Incentivize behavior	Offer incentives to residents with the intention of changing their behavior (e.g., health care organization pays patients to show up for appointments)
	Share information	Share information about services, programs, and healthy behaviors with residents through flyers, blogs, reports, social media, and more
Feedback and Input from Residents 	Conduct surveys, interviews, and focus groups	Gather feedback and input from residents on specific projects, services, or programs through in-person surveys, interviews, and focus groups
	Invite feedback via social media	Gather feedback and input from residents on specific projects, services, and programs through social media
	Invite representation on advisory committees and governing boards	Invite residents to serve on advisory committees and governing boards to gain their perspectives and input
	Host community meetings/town halls	Receive input from a broad group of residents through community meetings or town halls.
	Conduct listening campaigns	Organize a focused effort to build community and identify concerns and priorities in a specific region through one-on-one or house meetings
	Organize public deliberation processes	Organize public deliberation processes for the discussion and decision-making necessary to solve community problems
	Co-design of services and/or programs	Facilitate resident input in the design of community-related services and programs
Active Resident Leadership 	Provide grants for resident-driven initiatives	Invest financially in resident-driven and -led initiatives (e.g., grants for programs or for hiring and training community organizers)
	Open opportunities for shared decision-making	Provide opportunities for a large number of residents to participate in decision-making on specific issues (e.g., participatory budgeting)
	Offer physical space for community gatherings	Provide free access to community spaces for residents to gather and self-organize
	Deploy a cadre of residents as community organizers	Recruit, hire, and train residents as community organizers to build community power
	Open opportunities for residents' to build their capacity for leadership	Offer training in leadership and other skills to residents seeking to build their capacity for leadership positions

Appendix 2

Examination of Current Resident Engagement Practice

Resident Engagement Goals

Individually answer the following question: What are the goals of your resident engagement efforts?

Small Group Exercise | Time: 20 minutes

Instructions:

1. In silence, review and individually fill in the worksheet below (consult the descriptions on Resident Engagement Practices Typology handout on page 11) and map the activities that you are currently doing to engage residents
2. As a team discuss the following questions:
 - Refer to your stated goals. To what extent do your activities achieve your desired goals? Is there a gap between your stated goals and possible outcomes? Why do you think this gap exists?
 - Using our three categories, how do you characterize your activities? Do you have a balanced approach?
 - What do you need to do in order to create a more balanced approach?

Appendix 2 Resident Engagement Practices Worksheet

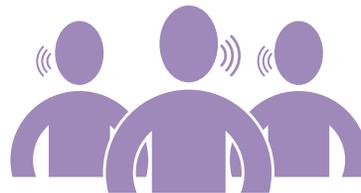
Check the boxes for the things that you are currently doing to engage residents. If you are not sure about what constitute each activity, consult the resident engagement typology handout for detailed description.

<input type="checkbox"/> Provide services and programs in the community <input type="checkbox"/> Incentivize behavior <input type="checkbox"/> Share information <input type="checkbox"/> _____	<input type="checkbox"/> Conduct surveys, interviews and focus groups <input type="checkbox"/> Invite feedback via social media <input type="checkbox"/> Invite representation on advisory committees and governing boards <input type="checkbox"/> Host community/town hall meetings <input type="checkbox"/> Conduct listening campaigns <input type="checkbox"/> Organize public deliberation processes <input type="checkbox"/> Co-design of services and programs <input type="checkbox"/> _____	<input type="checkbox"/> Provide grants for resident driven initiatives <input type="checkbox"/> Open opportunities for shared decision making <input type="checkbox"/> Offer physical space for community gatherings <input type="checkbox"/> Hire and deploy community organizers <input type="checkbox"/> Open opportunities to build resident leadership capacity <input type="checkbox"/> _____
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Resident Awareness and Participation



Feedback and Input from Residents



Active Resident Leadership



Appendix 3

★ ESSEX ENGAGEMENT over the years ...						
<p>1990's</p> <ul style="list-style-type: none"> CHIPS Breakfast Meetings OTHERS? 	<p>2000 →</p> <p>2001:</p> <ul style="list-style-type: none"> → Facing Future with Compassion + courage • Community forum on 6 month anniversary of 9/11 • Attended by 120 people <p>OUTCOMES + SPIN-OFF'S</p> <p>ANNUAL BLOCK PARTY</p> <p>2004:</p> <ul style="list-style-type: none"> → Bullying Forum • Attended by 300 people <p>OUTCOMES + SPIN-OFF'S</p> <p>Many legislators were there + inspired to support passage of State-wide anti-bullying + harassment legislation</p> <p>ANTI-HARASSMENT LEGISLATION</p>	<p>2005 →</p> <p>FORUMS</p> <ul style="list-style-type: none"> → re Grocery Store in EJ Village • Attended by 100 people <p>OUTCOMES + SPIN-OFF'S</p> <p>MAC'S MARKET</p> <hr/> <p>2010:</p> <ul style="list-style-type: none"> → Two Community Forums for Downtown Revitalization (ALL ABOARD FOR DOWNTOWN EJ) • Attended by over 100 people <p>OUTCOMES + SPIN-OFF'S</p> <ul style="list-style-type: none"> • FIVE CORNERS FARMER'S MARKET • RR AVENUE RECESS • VILLAGE PLANTERS • Applied for ORTON HHS grant • TRAIN HOP 	<p>2010 →</p> <p>2013</p> <ul style="list-style-type: none"> → Calendar 2.0 Forum • Attended by over 200 people. <p>OUTCOMES + SPIN-OFF'S</p> <ul style="list-style-type: none"> • CALENDAR 2.0 SHELVED DUE TO COMMUNITY OPPOSITION. <ul style="list-style-type: none"> → Heart + Soul of Essex • 2 year process that engaged 1,000 people <p>→ FORUMS + LIVING ROOM CONVERSATIONS + SURVEY + COMMUNITY ART PROJECT + TRIVIA + PHOTO BOOTH + VIDEOS + POP-UP SHOPS +</p> <p>OUTCOMES + SPIN-OFF'S</p> <ul style="list-style-type: none"> • ESSEX GOVERNANCE GROUP • ESSEX GATS OUT • THOUGHTFUL GROWTH IN ACTION • DESIGN 5 CORNERS • ON-LINE CALENDAR • CO-WORKING SPACE AT EZ • NOMAD COFFEE 	<p>2015 →</p> <ul style="list-style-type: none"> → Design Five Corners • engaged over 300 people • Survey + workshop <p>OUTCOMES + SPIN-OFF'S</p> <p>Raised awareness about opportunities for redevelopment of downtown, zoning ordinances. CHANGE IN ZONING LAW THAT LIMITS THE HEIGHT OF BUILDINGS IN EJ.</p> <ul style="list-style-type: none"> → Essex Balloteer • Citizen led initiative to create a paper that shares both progressive + conservative views about upcoming ballot issues. <p>2015-2016</p> <ul style="list-style-type: none"> → RED Study Committee (re school unification) • SURVEY 750 • SIX COMMUNITY FORUMS • ATTENDED BY MORE THAN 100 PEOPLE <p>OUTCOMES + SPIN-OFF'S</p> <p>COMMUNITIES ALL VOTE YES ON SCHOOL CONSOLIDATION TO FORM EWSD.</p> <ul style="list-style-type: none"> → THOUGHTFUL GROWTH IN ACTION 	<p>2016</p> <ul style="list-style-type: none"> → ESSEX COMMUNITY JUSTICE CENTER Forums on SAFETY, SEX OFFENDER release • ENGAGED OVER 120 people <ul style="list-style-type: none"> → Recreation Governance Study Committee • Surveys 350 • forums @ 20 people at 5 forums each • Engaged 450 people <ul style="list-style-type: none"> → Public Engagement Workshop! <hr/> <p>ENGAGEMENT INFRASTRUCTURE / RESOURCES</p> <ul style="list-style-type: none"> • CHIPS • H+S of Essex • ESSEX CJC • EWSD Nellie Mae School / Community engagement initiative • Municipal Support • Rec Departments • FAITH COMMUNITIES • ESSEX FREE + BROWNELL LIBRARIES 	