

# Community Engagement Planning Tool for Public Health Work

## Table of Contents

2	Overview
4	Planning Tool Form: Phase I
5	Planning Tool Form: Phase II
6	Planning Tool Form: Phase III
7	Planning Tool Form: Phase IV
8	Fictional Site Example

# Overview

## A flexible planning and implementation document

The Community Engagement Planning Tool is a flexible document that guides thoughtful planning and implementation of community engagement across the phases of public health work.

A Community Engagement Plan may be as detailed as you prefer, or it can be a very basic plan that defines the following factors across each phase of engagement for the site team and other partners and stakeholders. A Community Engagement Plan may include

- Community engagement goals,
- Partners and stakeholders,
- Key actions for information gathering and sharing, and
- Community engagement activities, materials, and timeline.

The Community Engagement Plan also functions as a tool for communicating about community engagement activities with all members of the site team and ATSDR leadership. It may help the team be accountable to the community and other stakeholders as the public health work progresses.

## Key Community Engagement Milestones in the Public Health Work Process

There are a few key milestones in typical public health work around which you may anchor your Community Engagement Plan

- First contact with community organizations (Phase I),
- First community visit by the site team (Phase II), and
- Release and communication of final report or findings (Phase IV).

Other milestones will vary depending on the nature of the public health work, the partners, and community needs. Additional milestones may include

- Data collection in the community (e.g., biological or environmental sampling, if applicable; Phase III),
- Health education in the community (Phase III), and
- Communications from the site team to partners and stakeholders on the status of the public health work (Phases II-IV).

These milestones are important for planning community engagement because they often have specific dates attached to them, and you will need to plan for specific preparation, implementation, and follow up work surrounding each milestone.

### ATSDR Community Engagement Playbook

The [Agency for Toxic Substances and Disease Registry \(ATSDR\) Community Engagement Playbook](#) (or “*the Playbook*”) was created to guide you, public health professionals and state, territorial, local, and tribal partners through the phases and activities of community engagement. The Playbook describes four phases of community engagement during public health work:



**Phase I** – Setting the stage



**Phase II** – Getting started



**Phase III** – Keeping it going



**Phase IV** – Wrapping Up

As you use this Community Engagement Planning Tool, please refer to *the Playbook* for guidance, resources, and important considerations for successful community engagement.

## Refreshing your Community Engagement Plan

You will likely update your Community Engagement Plan a few times over the course of public health work. At a minimum, you will likely find the most important moments for developing and refreshing Community Engagement Plans are during Phase I and right before starting Phase IV.

You may need to refresh your plan more frequently in any Phase of engagement due to various factors, including dynamics among your site team, partners, and the community; introduction of new site or chemical information; or changes to the public health work strategy.

## Why use the Community Engagement Planning Tool?

The Community Engagement Planning Tool is for a Community Engagement Specialist to fill in and keep track of the particulars of a given site. A Community Engagement Specialist can share the Plan with their site team to

- Communicate the community engagement goals and planned community engagement activities,
- Coordinate activities with comms messaging,
- Put forth a timeline for activities, and
- Hold site team members accountable for activities.

A Community Engagement Plan could potentially be shared with external partners who would be coordinating community engagement on behalf of their organization.

Note: Throughout this template look for comment bubbles that offer suggestions for completing the Planning Tool.



**Community Engagement Phase I: Setting the Stage**

<p><b>Goals for Phase I</b></p> <p><i>Focus here on listing the big picture goals you need to accomplish during the phase.</i></p>	
<p><b>Partners and stakeholders</b></p> <p><i>Your partners and stakeholders may evolve over time. Use this section of the Tool to note who you plan to reach out to and who you've already reached. That way, you will have a record of partners over time.</i></p>	
<p><b>Information gathering and sharing</b></p> <p><i>Focus on the big picture of what information you need to share and gather during the phase.</i></p>	

**Phase I: Activities**

Activity	Materials Needed	Timeline
<i>The Playbook lists key community engagement activities and the ideal timing for each activity.</i>	<i>Your materials will likely include community engagement tools found in the Playbook, as well as site-specific communications materials such as fact sheets, talking points, and PowerPoint slides.</i>	<i>Adding a timeline can help keep your site team on track.</i>
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		



**Community Engagement Phase II: Getting Started**

<p><b>Goals for Phase II</b></p> <p><i>Focus here on listing the big picture goals you need to accomplish during the phase.</i></p>	
<p><b>Partners and stakeholders</b></p> <p><i>Your partners and stakeholders may evolve over time. Use this section of the Tool to note who you plan to reach out to and who you've already reached. That way, you will have a record of partners over time.</i></p>	
<p><b>Information gathering and sharing</b></p> <p><i>Focus on the big picture of what information you need to share and gather during the phase.</i></p>	

**Phase II: Activities**

Activity	Materials Needed	Timeline
<i>The Playbook lists key community engagement activities and the ideal timing for each activity.</i>	<i>Your materials will likely include community engagement tools found in the Playbook, as well as site-specific communications materials such as fact sheets, talking points, and PowerPoint slides.</i>	<i>Adding a timeline can help keep your site team on track.</i>
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		



Community Engagement Phase III: Keeping it Going

<p><b>Goals for Phase III</b></p> <p><i>Focus here on listing the big picture goals you need to accomplish during the phase.</i></p>	
<p><b>Partners and stakeholders</b></p> <p><i>Your partners and stakeholders may evolve over time. Use this section of the Tool to note who you plan to reach out to and who you've already reached. That way, you will have a record of partners over time.</i></p>	
<p><b>Information gathering and sharing</b></p> <p><i>Focus on the big picture of what information you need to share and gather during the phase.</i></p>	

Phase III: Activities

Activity	Materials Needed	Timeline
<i>The Playbook lists key community engagement activities and the ideal timing for each activity.</i>	<i>Your materials will likely include community engagement tools found in the Playbook, as well as site-specific communications materials such as fact sheets, talking points, and PowerPoint slides.</i>	<i>Adding a timeline can help keep your site team on track.</i>
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		



**Community Engagement Phase IV: Wrapping Up**

<p><b>Goals for Phase IV</b></p> <p><i>Focus here on listing the big picture goals you need to accomplish during the phase.</i></p>	
<p><b>Partners and stakeholders</b></p> <p><i>Your partners and stakeholders may evolve over time. Use this section of the Tool to note who you plan to reach out to and who you've already reached. That way, you will have a record of partners over time.</i></p>	
<p><b>Information gathering and sharing</b></p> <p><i>Focus on the big picture of what information you need to share and gather during the phase.</i></p>	

**Phase IV: Activities**

<b>Activity</b>	<b>Materials Needed</b>	<b>Timeline</b>
<i>The Playbook lists key community engagement activities and the ideal timing for each activity.</i>	<i>Your materials will likely include community engagement tools found in the Playbook, as well as site-specific communications materials such as fact sheets, talking points, and PowerPoint slides.</i>	<i>Adding a timeline can help keep your site team on track.</i>
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

## Community Engagement Planning Tool: Fictional Site Example

We use the fictional case of the “Gala Lumber Company” to complete the example Community Engagement Planning Tool below which includes a fictional response from ATSDR. In the case, a company began operations in 1974 as a wood treatment facility that used chromated copper arsenate (CCA). Over time, operations at the site evolved to include a metal degreaser company using trichloroethylene (TCE), and an electrical company that had a permitted waste disposal area for polychlorinated biphenyls (PCBs). The land use around the site changed over time too to include homes using private drinking water wells on the northern fence line of the site, homes on the western and southern fence lines, a child-care center at the southwestern corner of the site, and a community park in the northeastern edge of the site. More details of the fictional case study are available from the Public Health Assessment Training modules at <https://www.atsdr.cdc.gov/training/pha-training-section1.html>.



### Community Engagement Phase I: Setting the Stage

<b>Goals for Phase I</b>	<ul style="list-style-type: none"> <li>• <i>Contribute to agency decision-making about undertaking and scoping environmental public health activities as a member of the site and/or scoping team.</i></li> <li>• <i>Learn about the community and environmental conditions.</i></li> <li>• <i>Identify and connect with partners and stakeholders in advance of visiting the community.</i></li> <li>• <i>Plan for community engagement and risk communication challenges.</i></li> </ul>
<b>Partners and stakeholders</b>	<i>State and/or local health departments, US Environmental Protection Agency (US EPA), state and/or local environmental departments, community leaders, advocacy organization(s), petitioner, local elected officials, local health care providers, faith-based organizations, schools, local police/sheriff, etc.</i>
<b>Information gathering and sharing</b>	<ul style="list-style-type: none"> <li>• <i>Gather details about the community and environmental conditions.</i></li> <li>• <i>Identify additional partners and stakeholders.</i></li> <li>• <i>Introduce ATSDR and the public health work process to the community and stakeholders.</i></li> <li>• <i>Introduce expectations of what the public health work process can and cannot do.</i></li> </ul>

### Phase I: Activities

Activity	Materials Needed	Timeline
<i>1. Conduct a scan and analysis of local media articles about the community environmental contamination and make a list of all media outlets in community and surrounding areas.</i>	<i>Media Analysis Guide</i>	<i>Minimum ten weeks before first community visit</i>
<i>2. Develop a Community Profile.</i>	<i>Community Profile template</i>	<i>Minimum eight weeks before first community visit</i>
<i>3. Connect by telephone with potential agency partners.</i>	<i>Talking points about ATSDR and the site-based public health work process</i>	<i>Minimum six weeks before first community visit</i>
<i>4. Conduct key informant interviews.</i>	<i>Talking points about ATSDR and the site-based public health work process</i>  <i>Key informant interview guides</i>	<i>Minimum four weeks before first community visit</i>
<i>5. Develop a Community Engagement Plan.</i>	<i>Community Engagement Planning Tool</i>	<i>Minimum two weeks before first community visit</i>



## Community Engagement Phase II: Getting Started

<b>Goals for Phase II</b>	<ul style="list-style-type: none"> <li>• Visit the community.</li> <li>• Refine relationships.</li> <li>• Increase trust and credibility.</li> <li>• Establish communication preferences and routines for regular information exchange.</li> </ul>
<b>Partners and stakeholders</b>	State health department, US EPA, community advocacy organization, local petitioner, school district superintendent, town mayor, town council, church-community outreach leader, local senior center director.
<b>Information gathering and sharing</b>	<ul style="list-style-type: none"> <li>• Identify community concerns about environment and public health.</li> <li>• Understand existing relationships between local, state, and federal partners.</li> <li>• Clarify roles of ATSDR and other partners.</li> <li>• Establish expectations of what the ATSDR public health work process can and cannot do.</li> <li>• Assess for community stress due to chronic environmental contamination.</li> <li>• Propose a timetable for the ATSDR public health work process in collaboration with the site team.</li> </ul>

## Phase II: Activities

Activity	Materials Needed	Timeline
1. Conduct small group meetings with partners and stakeholders in the community.	Talking points "Introducing ATSDR" fact sheet	During community visit
2. Assess for community stress.	ATSDR Community Stress Resource Center	During community visit
3. Conduct meetings with community leaders, petitioner, and community organizations.	Talking points and Q&As "Introducing ATSDR" fact sheet	During community visit
4. Conduct a public meeting in the community.	Talking points "Introducing ATSDR" fact sheet ATSDR PowerPoint slide deck (Overview and PHA process)	During community visit
5. Develop site-specific e-mail list of community members, partners, and stakeholders.	Voluntary email address collection form	One week after community visit
6. Deploy ATSDR stress resource center tools in the community, if needed.	ATSDR Community Stress Resource Center	In follow up to the community visit



### Community Engagement Phase III: Keeping it Going

<b>Goals for Phase III</b>	<ul style="list-style-type: none"> <li>• <i>Gather additional information from the community as needed to fully understand community concerns.</i></li> <li>• <i>Maintain regular and frequent transparent communication about the status of the public health work process.</i></li> <li>• <i>Educate and prepare community members to receive findings, conclusions, and recommendations of the public health work process.</i></li> </ul>
<b>Partners and stakeholders</b>	<i>State health department, US EPA, community advocacy organization, local petitioner, school district superintendent, town mayor, town council, church-community outreach leader, local senior center director, local newspaper.</i>
<b>Information gathering and sharing</b>	<ul style="list-style-type: none"> <li>• <i>Communicate status of public health work process with partners and stakeholders.</i></li> <li>• <i>Ensure the community is aware of and knowledgeable of the opportunity to participate in a health education activities, such as workshops.</i></li> <li>• <i>If applicable, inform the community about the opportunity to participate in biological or environmental data sampling (e.g., participate in blood or urine testing, or household environmental sampling).</i></li> </ul>

### Phase III: Activities

Activity	Materials Needed	Timeline
<i>1. Conduct outreach to increase community awareness of opportunity to participate in biological and/or environmental sampling activities.</i>	<i>Sampling Protocol Fact sheet Website content Awareness fliers Media release</i>	<i>Six months – one year after community site visit or as sampling protocol becomes available</i>
<i>2. Distribute communique on status of public health work to site-specific e-mail list.</i>	<i>Email content Site-specific fact sheet Site-specific website Newsletter Newspaper advertisement</i>	<i>Quarterly following initial community site visit</i>
<i>3. Conduct a health education workshop in community.</i>	<i>Event fliers Email communique PowerPoint slide deck of workshop content</i>	<i>After the site visit, determine the timing with the community's input</i>



### Community Engagement Phase IV: Wrapping Up

<b>Goals for Phase IV</b>	<ul style="list-style-type: none"> <li>• <i>Communicate findings, conclusions, and recommendations of the public health work to the community and to partners and stakeholders.</i></li> <li>• <i>Respond to questions and concerns about findings, conclusions, and recommendations.</i></li> <li>• <i>Ensure community, partners, and stakeholders are connected to each other and/or to resources to continue to work toward their community environmental health goals.</i></li> <li>• <i>Evaluate effectiveness of community engagement activities.</i></li> </ul>
<b>Partners and stakeholders</b>	<i>State health department, US EPA, community advocacy organization, local petitioner, school district superintendent, town mayor, town council, church-community outreach leader, local senior center director, local newspaper, local blogger/social media influencer.</i>
<b>Information gathering and sharing</b>	<ul style="list-style-type: none"> <li>• <i>Describe how the public health work process, findings, conclusions, and recommendations take into consideration community concerns about environment and health.</i></li> <li>• <i>Use understanding of existing relationships between partners and stakeholders to inform equitable rollout of report.</i></li> <li>• <i>Restate expectations of what the ATSDR public health work process can and cannot do.</i></li> <li>• <i>Ensure community members are aware of other potential federal, state, and local partners who may be able to assist the community in addressing further concerns.</i></li> </ul>

### Phase IV: Activities

Activity	Materials Needed	Timeline
<i>1. Conduct outreach to increase awareness of the release of the final report to partners and stakeholders.</i>	<i>Final report                      Consumer summary fact sheet                      Report rollout plan                      Talking points and Qs &amp; As                      Media release                      Social media messages</i>	<i>Four weeks before community site visit</i>
<i>2. Conduct small group briefings with partners and stakeholders about findings of final report.</i>	<i>Final report                      Consumer summary                      Talking points and Qs &amp; As</i>	<i>Two weeks before community site visit</i>
<i>3. Conduct a public meeting in the community about findings of final report.</i>	<i>Final report                      Consumer summary                      Talking points and Qs and As                      Media Announcement                      PowerPoint slide deck                      Public meeting planning worksheet</i>	<i>Four weeks after release of final report</i>