



THINK

Initial Assessment

Purpose of this template: To contemplate the various components, resources and constraints that come into play when planning a public engagement process.

Directions: Fill in the document the best you can; you do not need to go in order.

Category	Fill in if applicable	Note
Title of effort		Internal title or formal title.
Time horizon		Weeks/ months.
Geographic focus		Whole jurisdiction or subsection; be specific.
Target outreach groups		E.g.: Homeowners, renters, youth, ethnic groups, business owners, parents of afterschool program recipients.
Level of public input desired	<p><i>Tip: Address this category when resource constraints are clear.</i></p>	<p>Could depend on: the amount of time/ resources available; significance of issue; what just happened or is coming soon with other engagement. See also IAP2 Engagement Spectrum</p>

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Potential components of in person engagement		E.g.: Small meetings with stakeholders, focus groups, town hall, workshops, open house, listening sessions (similar to coffee with a cop).
Digital components	<i>Tip: At a minimum have info easily accessible on your website.</i>	E.g.: Website; surveys; instant polling; ideation; etc.
Outreach efforts	See Outreach Template	
Potential locations to hold events/ meetings		E.g.: Community Centers, schools, libraries, government buildings, faith-based, community rooms at institutions such as banks, foundations, non- profits, etc.
Lead staff		Name(s); roles
Supporting staff		E.g.: PIOs, Manager’s Office, CAO’s Office, Director’s Office, I.T., printing department; utilities (for mailers), etc.
Consultant(s) (If applicable)		Name(s)/ role(s)

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Role(s) of Electeds		E.g.: Welcoming at meetings in their area, keeping those with keen interest in the loop regularly; involving elected/ their staff in planning of events.
Key stakeholders		<p>Quick list of a few key stakeholders; these folks should have various perspectives on the issue(s). Make phone calls to run these very first ideas by them. At least three phone calls (example script below)</p> <ul style="list-style-type: none"> • This is __. I’m exploring an issue and I was hoping to get some quick, initial feedback from you on it – if you have time. • It’s __Name issue __; we’ve got about __weeks/mo__ to connect with the community on their views so we are exploring how we might do that. • What are your initial, just gut level thoughts on what the (City/County/Special District) should do? • [If appropriate] Right now we are contemplating __activities... What do you think? • This is my final question, If I was going to call 3 more folks on this who do you think we should reach out to?
Budget	<p>\$:</p> <p>Staff time:</p>	<p>If no dollar budget, note ‘in house’ or in-kind resources that are important. Staffing: Be sure to consider how much time it is likely to take to input public feedback, analyze and/or theme input, and, if applicable, prepare input summary for public view.</p>



<p>Tricky potential issues</p>		<p>Consider <u>Internal challenges</u> (eg. Over these three months we are switching IT servers; over these months our Director is retiring).</p> <p>Consider <u>External challenges</u> (eg. very vocal group will be against; a business is being built in that area and residents are still upset about how that went; Measure __ failed two months ago and people might associate this with that; A recent police shooting has neighborhood on edge and especially distrustful of government.</p>
<p>Legal consideration</p>		<p>Policy or legal issues to consider-work with your legal counsel (city attorney, county council, etc.).</p>
<p>What happens with public input</p>		<p>If a resident asks “What happened to my input/ suggestion” what are you going to say.</p>

About the Institute for Local Government

The Institute for Local Government’s (ILG) mission is to promote good government at the local level with practical, impartial and easy-to-use resources for California communities. ILG is the nonprofit 501(c)(3) research and education affiliate of the League of California Cities, the California State Association of Counties and the California Special Districts Association.

For more information about the TIERS Framework and Learning Lab, please contact Madeline Henry at mhenry@ca-ilg.org

To access the Institute’s resources on public engagement, visit www.ca-ilg.org/engagement

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