



Pillar 1: THINK

Step 1: Self-Assessment Template

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
Overview of Program/ Service/ Policy Addressed		
Purpose and Intended Outcome of Engagement		
Time horizon		Weeks/ months
Geographic focus		Whole jurisdiction or subsection; be specific

Potential formats 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		E.g.: Website; surveys; instant polling; ideation; etc. <i>Tip: At a minimum have information easily accessible on your website</i>
Outreach efforts	See Outreach Template	
Potential locations/ platforms 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); role(s)
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)
Role(s) of Elected Officials		E.g.: Provide welcome at meetings in their area, keeping those with keen interest in the loop regularly; assign staff to help plan events
Key stakeholders		Short list of a few key stakeholders; these folks should have various perspectives on the issue(s)

<p>Tricky potential issues</p>		<p>Consider <u>Internal challenges</u> (e.g., over these three months we are switching IT servers; over these months our Director is retiring).</p> <p>Consider <u>External challenges</u> (e.g., 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>COVID/Pandemic Considerations</p>
<p>Legal consideration</p>		<p>Policy or legal issues to consider, work with your legal counsel (city attorney, county council, etc.)</p>
<p>Title of effort</p>		<p>Internal title or formal title</p>