

Montgomery Planning

Equitable Engagement Guide

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1. About Engagement

Montgomery Planning is committed to engaging with community members and to further developing our engagement system to encourage and support community dialogue and engagement throughout the planning process.

Engagement is not only the domain of planning and communications staff. Every Montgomery Planning team member is a part of engagement because every staff member has an impact on how community members view Montgomery Planning and our work.

The purpose of this guide is to help Montgomery Planning staff work with the Communications Division to:

- Create a more efficient, equitable, and effective community outreach and engagement process.
- Determine the appropriate level and type of community engagement for the goals and phases of each plan or project.
- Identify audiences and other stakeholders to engage.
- Develop outreach and engagement that is consistent, respectful of stakeholder needs, and on-brand for Montgomery Planning.
- Provide information, outreach, and engagement that meets community members where they are, and is designed to engage traditionally underrepresented community members.
- Clearly identify the resources needed to do successful outreach and engagement.
- Establish timelines and delineate responsible parties at each step of the process, in consultation with the Communications Division.
- Help staff have the knowledge, training, experience, resources, and internal support needed to conduct outreach and engagement plans and activities.
- Identify and track performance measures, gather useful and consistent data to inform current and future planning efforts, and use and share data to evaluate success and improve future efforts.

Why engagement is important

Effective community engagement provides community members and organizations, planners, and decision-makers opportunities to shape the vision for a geographic area or specific function and develop recommendations to fulfill that vision. Engagement helps us:

Make better recommendations and decisions

Perhaps the most important reason to do engagement is to improve the recommendations Montgomery Planning makes and the plans and projects we put forward, ultimately improving the quality of life in Montgomery County. Community engagement allows us to better:

- identify and confirm priorities,
- brainstorm options for alternative solutions to problems,
- make decisions informed by community members' knowledge and values,
- address concerns or issues early in the process, and
- develop plans that reflect community needs, priorities, and expectations.

Improve knowledge

When effective, engagement can expose diverse perspectives as people and groups share information, opinions, and ideas. This is helpful because:

- Community members get accurate information about Montgomery Planning and our projects. When community members better understand the opportunities and constraints present, they can provide more useful and nuanced input. They may also become more aware of a range of perspectives on topics from their neighborhood and community groups.
- Montgomery Planning gains a wealth of insight on community needs, concerns, conditions, values, and priorities and develops relationships to help improve our communities. When we engage all community members early and often, especially those traditionally underrepresented, we can better understand their views about issues.

Increase equity Increase equitable outcomes or Reach equity goals or Invite equitable interactions

The more we speak and listen to each other, the more we understand each other. As Montgomery Planning staff, we sometimes may be too close to a planning topic or hold assumptions about what the community needs. Engagement with diverse community members not only helps us understand their realities and actual needs, it also helps us learn from diverse communities typically under-represented in the planning process.

When we ask ourselves how communities have been engaged (especially those not historically involved in planning processes), then look for opportunities to expand outreach and engagement, we increase the chance of engaging community members through all phases of a plan or project. By engaging communities of color and people of all abilities, ages, genders, and socio-economic status, we increase our understanding of these communities and their outreach and engagement preferences, allowing us to understand the opportunities to effectively reach and engage them over time. We also learn about barriers to their ability to engage such as schedule conflicts, transportation issues, childcare needs, language barriers, and cultural norms like discomfort with speaking in public forums. If we properly collect, analyze, and share with each other the knowledge we gain through increased engagement, Montgomery Planning can more effectively and efficiently reach out to and engage with these community members over time.

Create social capital

A positive side effect of successful equitable engagement may be increased social capital among different groups of people throughout the county, thus building and strengthening communities. According to Public Agenda:

“When people interact with one another on a regular basis, over a long period of time, this seems to have beneficial impacts on the community as a whole....Communities with stronger networks and higher social capital have higher rates of economic growth, lower levels of unemployment and lower crime rates. Residents are physically healthier and the communities are more resilient...”¹

Build trust

While community members may be distrustful of government for a variety of reasons, poorly conceived and executed public engagement efforts further erode trust. Community members are not likely to participate in planning processes if they do not believe that their participation can influence the decisions, plans, and policies.

We must honor people’s time and capacity for participation, taking a community-centric approach to be honest and transparent with our outreach and engagement. This includes building awareness of and trust in Montgomery Planning with ongoing communications to clarify Montgomery Planning’s role and value to all stakeholders and to increase equitable community stakeholder engagement with the planning process.

We also must clearly communicate as much as Montgomery Planning can about a plan’s implementation, including educating community members about Montgomery Planning’s role at the implementation phase. Even if the community understands Montgomery Planning’s limited implementation role,

1 Public Agenda (2018) Strengthening and Sustaining Public Engagement: A Planning Guide for Communities. p 6. https://www.publicagenda.org/wp-content/uploads/2019/09/PublicAgenda_StrengtheningAndSustainingPublicEngagement_2018.pdf

community members will be less likely to trust Montgomery Planning as implementation issues arise if we stop communicating as soon as the plan or project is approved.

Strengthen relationships

Part of building trust with community members is working to build stronger relationships with trusted community-based organizations, businesses, and community influencers. These groups and individuals who already have the community's trust can be of great help in reaching and engaging diverse audiences.

Effective engagement involves expanding the network of and strengthening relationships with people and groups we rely on to bring community members to the planning table. This work is department-wide and not plan-specific as the foundation for and cultivation of those relationships must happen over time in a way that is coordinated across the department and is mutually beneficial. We cannot continue to ask these groups and individuals to help us without providing something in return. So we must ask ourselves: how does helping Montgomery Planning benefit these influential organizations and individuals?

Build buy-in

When people are engaged in generating ideas, evaluating alternatives, and developing recommendations, they're more likely to feel ownership over a process or project and, therefore, more likely to support it. When community members are a part of shaping plans, they better understand why plans recommend what they do and can become good ambassadors for the plan.

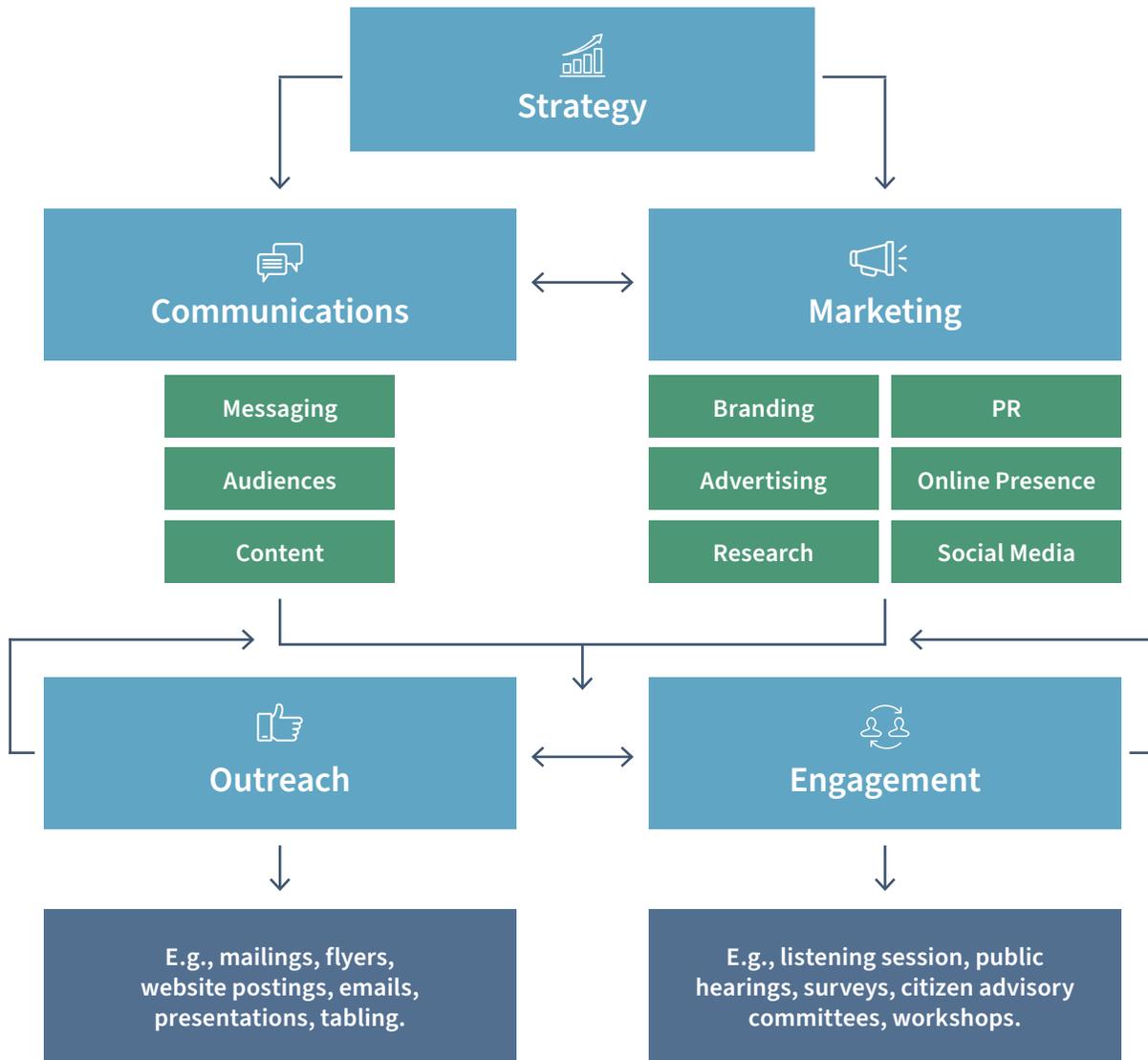
Increase participation

The more often – and the more ways – we engage the community, the more opportunities there are for community members to participate in the planning process. And if people see and hear about their neighbors' and friends' positive experiences participating, the more likely they also will be willing to participate.

Defining terms

Communications, outreach, and engagement

We sometimes use the terms communications, outreach, and engagement interchangeably. However, differences between these activities and how they fit within a larger strategy and with other activities are important to note so that we engage in the appropriate activities for the given phase of the planning process.



COMMUNICATION, at its core, is the sharing or exchanging of information or news – the tool by which we share stories, data, experiences, and other information. Organizations and individuals are ALWAYS communicating, whether intentionally or not. Therefore, the strategic, coordinated, and consistent flow of communication with internal and external audiences is essential to the success of Montgomery Planning and of our plans and projects.

Communication is inherently cross-functional, involving everyone within the organization. At Montgomery Planning, the Communications Division works with leadership to define organizational messaging for consistent use by all staff. The Communications Division also works closely with planners to identify audiences, create, and shape messaging and related content to inform audiences, and support marketing and subsequent outreach and engagement activities with community members.

SECTION 1: ABOUT ENGAGEMENT

Communications underlie all outreach and engagement activities, forming the foundational messages and content to educate, inform, and prime stakeholder to engage with us on plans and projects. While marketing and outreach target specific external audiences, communications may cast a wider net by creating messaging for other stakeholders, including employees, partners, and public and government officials, as these audiences play a significant role in the success of our marketing endeavors.

OUTREACH is educational communication that tells community members about an opportunity, problem, issue, policy matter, or decision. Outreach is focused on connecting Montgomery Planning's work with the public; building awareness; and sharing information about plans, projects, programs, resources, and services with community members. Outreach is:

- One way; it's something we do to or for people.
- Passive and transactional.
- Short-term.
- Aimed at informing and, sometimes, motivating community members to participate in engagement activities.

Examples of outreach include

- mailings sent to neighborhood residents
- fliers placed throughout a community
- website postings and articles
- eNewsletters
- door-knocking
- informational sessions/calls/presentations without the opportunity for dialogue
- informational tabling at community events
- phone banking

ENGAGEMENT is a process where organizations acting for community benefit come together with community members to solve a problem or make a decision. Engagement focuses on building lasting relationships with community members in order to develop a collective vision, take collaborative action, and empower community members to influence and shape public decisions. Engagement is:

- Mutual; it's something we do with people.
- Active and inclusive. Engagement can include listening, exchanging viewpoints and ideas, dialogue, deliberation, consultation, and problem-solving.
- Designed to fit the purpose and specific circumstances of the plan or project, as well as the needs and preferences of community members.

- Long-term in that it seeks to achieve long-term and sustainable outcomes, relationships, discourse, and decision-making.
- Aimed at connecting the needs and interests of Montgomery Planning with the needs and interests of community members.

Examples of engagement include community consultation activities such as

- listening sessions/focus groups
- creation of/partnership with community-based organizations, citizen committees, advisory committees, workgroups, etc.
- prioritization and tradeoff exercises
- public hearings with the opportunity for public comment, ideally along with public dialogue
- town hall meetings
- office hours
- dialogue with neighborhood leaders and community groups
- roundtable discussions
- surveys and polls
- comment forms
- online conversations to solicit information or feedback from the community on listservs, blog comments, or social media platforms such as Nextdoor, Facebook, and Twitter
- Canvassing and door knocking

It is important to note that true engagement is not one-way or transactional. If you find yourself speaking more than listening or if you are doing engagement to check a box, you're not doing authentic engagement. In fact, you're likely doing more harm as you erode trust with the people you're trying to engage. During true engagement, both planning staff and community members learn about each other, educate each other, and develop a collaborative relationship.

SECTION 1: ABOUT ENGAGEMENT

To further distinguish outreach from engagement, we've adapted the following from Building the Field of Community Engagement Partners:²

Outreach	Engagement
What kind of relationship do you have with community members?	
Relationships are primarily transactional, for the purpose of completing a project.	Relationships are foundational, continually built between and among people and groups. Staff/institutions continually build the relationships they need to know their community.
Relationships are often not inclusive of all groups in the community.	Relationships reflect the diversity within the community.
Relationships can be limited to a few community members, often giving influence to those with the loudest voices.	Relationships are built not just with current leaders, but also with people with an interest and/or potential to be leaders.
Relationships are short-term, so staff have to rebuild them as other projects or issues come up.	Relationships are transformational and long-term, so community leaders/members can engage in projects + issues as they come.

2 Building the Field of Community Engagement Partners and Tracy Babler (2014). Distinguish your work: Outreach or community engagement? An assessment tool. pp3-5. <https://nexuscp.org/wp-content/uploads/2015/02/BTF-DistinguishYourWork.pdf>

Outreach	Engagement
Why are you engaging people?	
To accomplish a project or a specific goal defined by Montgomery Planning.	To create space for people to connect, raise concerns, build power, and act in their own interest.
To seek buy-in or approval of something the organization has already planned.	To create space for the community's assets to be recognized and utilized.
How are you getting people involved? When?	
Primary activities with the community include flyer-ing, surveys, sharing information, presentations, etc.	Primary activities with the community include listening sessions, on-to-one meetings, celebrations, leadership development, community-building projects.
Give information or request feedback after a project is planned.	Planning is done with the community from the beginning.
How do ideas get generated?	
Staff/institutions generate ideas they think the community will support.	Staff/institutions support community members in generating their own ideas.
Staff/institutions generate solutions to a problem they have defined.	Staff/institutions engage in continual self-reflection to respond to and incorporate people's ideas, feedback, talents, and challenges into the work.

Audience, community member, and public

We also sometimes use the terms “audience,” “community member,” and “public” interchangeably. The distinctions between these terms and Montgomery Planning’s preferred use are as follows:

“AUDIENCE” is used primarily in relation to communications, marketing, and outreach activities, which are generally passive, one-way activities. These activities may invite but generally do not involve the types of collaboration or consultation involved in engagement activities.

“COMMUNITY MEMBER” OR “THE COMMUNITY” are the terms Montgomery Planning uses in relation to engagement strategy and activities. Broadly, community members are those who will or may be affected by the plan or project at hand. During engagement, interaction is mutual, active, and inclusive. Engagement activities invite and involve collaboration and consultation, so the people whom we engage are not passive receivers of information, rather they are active participants and contributors to developing a plan or project.

Each plan or project will have a larger community with smaller, distinct community groups within to consider during engagement. Each of these distinct community groups will require different strategies and tactics for effective engagement. Most of the time when we are referring to “the community,” we are referring to the larger community. This nearly always includes residents but may also include people who work in an area, businesses, organizations, and nonprofits, etc.

“PUBLIC” should be avoided except in situations where legacy language dictates its use. For example, “public hearing” and “public comment period.” The word public has connotations that put Montgomery Planning in an arms-length position from the community and therefore is not used when trying to form collaborative engagement with the community.

“STAKEHOLDERS” encompass a larger group of all who have a stake in the plan. This includes community members, groups, businesses, nonprofits, and others we might regularly engage while developing the plan. It also includes colleagues at other county and state agencies, elected officials, developers, members of the media, and any person, group, or entity that has an interest in the plan.

Engagement goals

Our plans create a vision for the community – whether that community is the entire county or a specific neighborhood. Through all of our plans, both big and small, Montgomery Planning engages the community throughout the process so that we can create a shared vision for the future.

The primary goal of Montgomery Planning’s community engagement process is to ensure that community members are constructively and meaningfully involved in the decisions that shape their communities and to increase trust, communication, and understanding between the community and Montgomery Planning. Our goals are:

Goal 1: Transparency

Community members have a clear understanding of the scope of the plan, the schedule, possible outcomes, and their role throughout the process. People also understand the role, responsibilities, and limitations of Montgomery Planning. They understand how and why community input is or is not reflected in the recommendations of the plan.

Goal 2: Inclusion

All communities who may be affected by the plan are actively involved in the community engagement process. Community members share different experiences, perspectives, and expertise. Community participants are reflective of the population, sharing relevant characteristics of the population and including groups who have been historically or systematically excluded from past planning efforts. Montgomery Planning elevates these historically marginalized voices and histories to correct disparities in influence and outcomes that perpetuate inequities.

Goal 3: Mutual Learning

We learn from community members' lived experiences to help identify barriers, opportunities, and strengths that need to be addressed or elevated through the planning process. As Montgomery Planning incorporates the experiences and ideas of community members, we also strive to educate community members about the master plan process, timeline, planning concepts and ideas, as well as share data and analysis. The exchange of information and ideas creates a shared understanding and a fully informed community that knows how its county government works and understands its planning process.

Goal 4: Shared Vision

Participants move towards identifying shared values and desired outcomes. Through informed deliberation, community members and Montgomery Planning develop a shared understanding and vision for the future.

Goal 5: Community Influence

Participation has a tangible and apparent impact on outcomes; it is tracked, measured, and assessed transparently. Ideas garnered through the community engagement process are reflected in the plan and community members can trace their influence – even if not all ideas are included in the plan. Public servants, other organizations, and citizens themselves take action (often in collaborative or coordinated ways) during the plan process or plan implementation to address key issues and opportunities identified through the process.

Goal 6: Increased Community Capacity

Participants are given adequate information and resources to participate meaningfully and equitably. They understand the planning process and have a shared sense of ownership of and commitment to the

process and outcome. Community members endorse decisions and actions by Montgomery Planning because decisions clearly reflect public participation in a transparent engagement process. They understand how and feel equipped to track plan implementation, collaborate on future projects, and advocate for policies.

Goal 7: Build Trust

Montgomery Planning builds mutual trust and respect with communities, organizations, businesses, and individuals. Through an open, transparent, and equitable process community members achieve a high degree of confidence in the process and believe that their contribution will have an impact. Community members feel that they have been heard and that, through the planning process, Montgomery Planning will work to address concerns, deficiencies, and opportunities in their community. Community members continue to collaborate and communicate with Montgomery Planning in the future.

Engagement approach

Montgomery Planning's overall engagement approach is community-centric and focused on making the department's work about the community. To do this, we:

- Specifically identify and understand our stakeholders, especially community members. This understanding must go beyond demographic information to include a deep dive on participants values, wants, needs, knowledge of their community, information and engagement preferences, and more
- Examine community members' place in the overall plan or project journey.
- Make it easy for people to participate.
- Meet people where they are rather than asking them to come to us.
- Invite conversation and sharing rather than participation in a process.
- Shine a light on community contributors.
- Show what's at stake and what's possible for the future.
- Frame questions differently and be provocative to pique interest and appeal to community values.
- Tell and show community members how and where their input was applied; or explain why it was not.

As we take this approach, we must ensure that:

- Outreach and engagement is integrated into the planning process.
- Outreach will be simple and easy to understand, using plain language and avoiding planning jargon and technical details.
- Engagement activities will not require prior planning or policy knowledge.

- Strategies and staffing are tailored to the engagement phase and the target audience(s).
- Planners form and strengthen relationships with community-based organizations and influential individuals to build connection and trust across diverse populations.
- Internal communication (communication meant for/among Montgomery Planning staff and/or the Planning Board) is a priority for consistency and accuracy of messaging and engagement.
- Tools and mechanisms are developed and employed for evaluation and reporting.

Finally, success requires that Montgomery Planning staff:

- Understand the vision and goals for the project or plan and their individual roles.
- Be able to articulate an impact statement that aligns with the vision and goals for any proposed outreach or engagement.
- Clearly define and work to understand audiences, especially equity audiences, and consider those audiences in every outreach and engagement decision.
- Confidently communicate about the project or plan using approved, audience-focused messaging, approved materials, and communications and engagement best practices.
- Embrace the concept that everyone is responsible for outreach and engagement.

Principles of effective engagement

Montgomery Planning staff must strive to follow these principles for effective and meaningful community engagement:

Clarity

Clearly identify the purpose and goals of outreach and engagement at each stage and phase of a plan or project. Define what you are asking of audiences and/or inviting them to do at each stage.

Inclusiveness + equity

One of the first activities of engagement planning is identifying the people, organizations, and groups who may be affected by the plan or project. The engagement plan and subsequent engagement activities should encourage and facilitate participation by those who may be affected by the plan or project, including those who are historically underrepresented in the planning process.

Provide multiple opportunities for participation that are designed with the needs of varied groups in mind so that everyone has the chance to participate. Strategies and tactics must be culturally sensitive and provide the resources and accommodations needed to ensure full participation by all identified communities.

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Be adaptable and flexible, recommending strategies and tactics based on audience needs and preferences to ensure equitable engagement. Consider literacy level, socioeconomic status, language, culture, and physical and mental ability.

It may also be helpful to acknowledge and address past inequities, preferably those identified by community members, and specify how Montgomery Planning will avoid repeating the wrongs of the past.

Flexibility

Meeting the needs of diverse populations requires us to embrace a learning culture and remain adaptable and flexible. While there is urgency behind our efforts to create more equitable outreach and engagement, we celebrate learning while doing, constantly building and evolving as we learn more about and from community members. We must develop short- and long-term strategies, making meaningful progress each day.

Collaboration

Involve the community early and often, even at the early stages of engagement planning. Build and maintain ongoing and mutually beneficial relationships with community members, and especially community influencers, community-based organizations, and other groups trusted by the community. Design engagement experiences that encourage listening and learning together.

Respect

Plan outreach and engagement well to meet the needs of community members and respect their experiences, knowledge, opinions, time, and life circumstances.

Begin a respectful engagement process by clearly communicating the purpose for community engagement and how the community's participation will impact outcomes. Provide community members with the information needed to meaningfully participate.

Do not attempt to engage community members if their participation cannot make a difference. Give people the chance to contribute at a time in the process when their input can have the most impact. Also, make sure you have concrete ideas for how you can use their input to impact before engaging with community members.

Finally, in the words of the National Park Service, “Ensure that all voices are heard, but none dominate.”³

3 National Park Service (2007). Civic Engagement and Public and Involvement Guidelines. <http://www.nps.gov/policy/DOrders/75A.htm>

Authenticity

Engage community members only when their involvement will have a meaningful impact on recommendations or plans. Do not undertake community engagement when decisions have already been made and there is no room for change, to check a required box without the intention of using community feedback to shape the plan or project, and/or when promised outcomes cannot be delivered.

Community members are not likely to participate in planning processes if they do not believe that their participation can influence the decisions, plans, and policies. Therefore, we must honor people's time and capacity for participation, taking a community-centric approach to honest and transparent outreach and engagement. This includes building awareness of and trust in Montgomery Planning with ongoing communications to clarify Montgomery Planning's role and value to all stakeholders and to increase equitable community stakeholder engagement with the planning process.

Identify and seek to overcome barriers to participation. Facilitate open conversations where participants listen to each other and are able to share freely.

Strong relationships + sustained engagement

Build knowledge, understanding, and capacity over time, learning from successes and missteps along the way. Each plan and project – and all the time in between – provide an opportunity to build and strengthen relationships with community members, influencers, community groups, and other organizations. As these relationships develop through sustained engagement, Montgomery Planning learns more about community issues and better understands the demographic, cultural, economic, social, and other realities of community members.

Keep community members and other stakeholders informed after the plan is approved and transmitted. Provide updates about what Montgomery Planning knows about implementation activities, including Montgomery Planning's role and activities related to implementation.

Transparency + responsiveness

Communicate often and clearly with the community members and organizations affected by the plan or project. Clearly state who is involved in and who organizes engagement activities. Proactively share public feedback and demonstrate how feedback was used to inform recommendations or plans, or why it was not. Be responsive to community members' and other stakeholders' questions, concerns, comments, and ideas.

Evaluation/shared results

Develop and share success measures among the planning team, leadership, and communications division staff at the beginning of the planning process and reevaluate them before beginning each phase of the

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process. Develop tools and mechanisms for evaluation and reporting. Evaluate outreach and engagement strategies on an ongoing basis and celebrate progress with the community.

Develop a system for consistently learning from audience response and feedback, including questions to help better understand the needs and outreach and engagement preferences of various groups.

Share results internally and externally to improve future outcomes. Evaluate engagement strategies and activities for effectiveness.

Easy participation

When communicating with diverse groups, be mindful that others don't have the same context or level of knowledge that we have at Montgomery Planning. Their reality and experience differ from ours. We should assume that many community members are unaware of and likely don't understand how participating in Montgomery Planning activities could be beneficial to them. So we must position outreach and engagement in a way that is relevant to their realities.

Thoughtfully consider the most convenient ways for community members to participate. Make outreach simple and easy to understand, avoiding planning jargon and technical details. Engagement activities should not require prior planning or policy knowledge. Consider the timing of meetings and events relative to school, work, or mealtimes; the need for provision of childcare; and the importance of offering meals or food. Consider alternatives to in-person meetings such as telephone town halls or virtual meetings as appropriate to relevant community groups.

Efficiency

Use outreach and engagement methods and tools that are appropriate to the phase in the process and the purpose of outreach and engagement.

Avoid duplication of efforts. Identify and collaborate with Montgomery County government, community-based groups, and other organizations already engaging the community and work to collaborate. Align efforts where possible to bring together varied perspectives. Partner with organizations by co-hosting listening sessions and events, providing content for their events and communications, and resourcing their staff with tools like social media posts, meetings in a box, and talking points.

2. Communications + Engagement Planning Process

When done well, communication has the power to spark connection, create goodwill, and earn support as we bring people along with us at every milestone of our work. When neglected or done poorly, we miss communication opportunities, audiences become alienated, engagement is not equitable, and it is difficult to gain support.

For Montgomery Planning, effective outreach and engagement relies on well-conceived communications and engagement planning. Communication is an integral part of and support for successful outreach and engagement.

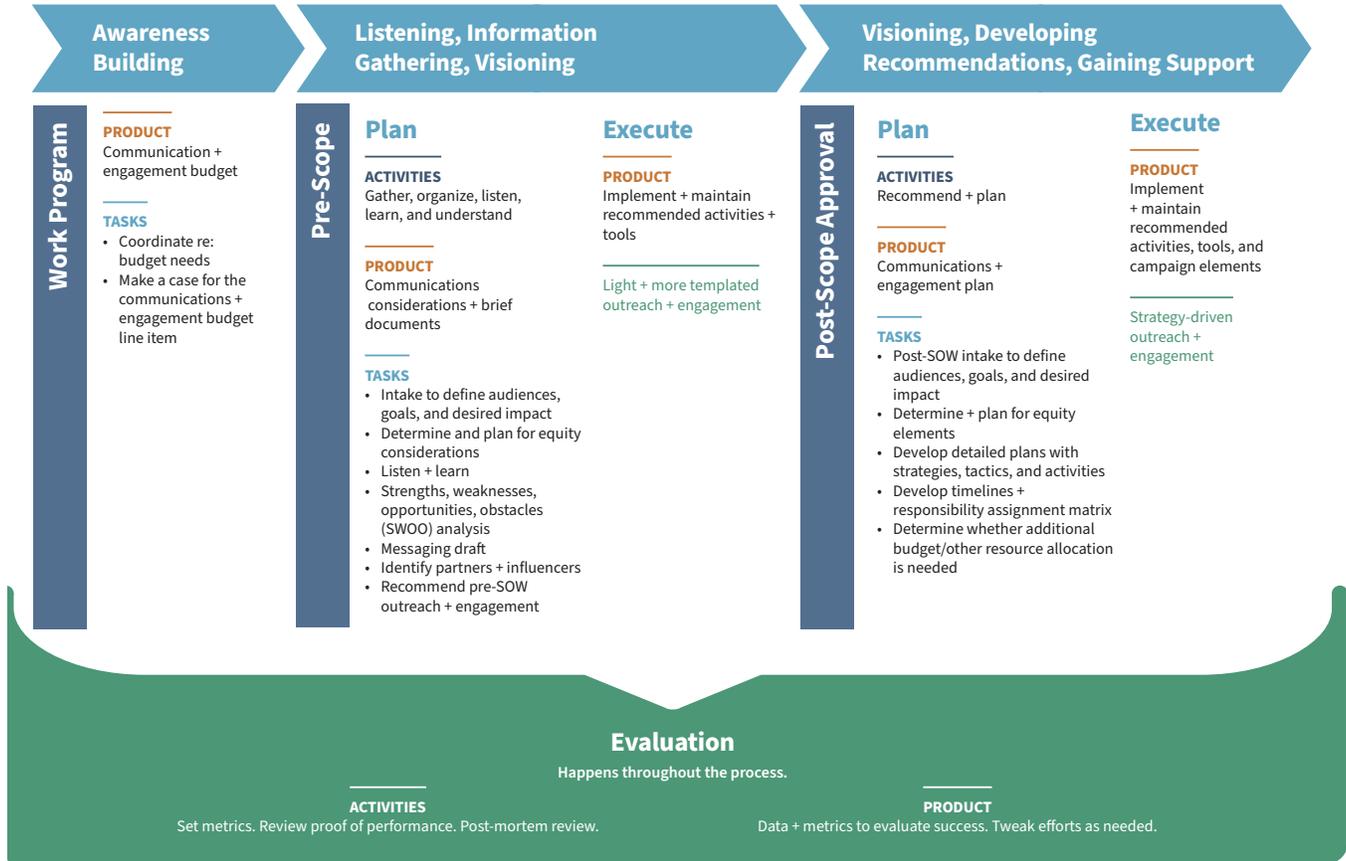
To optimize impact, all communications, outreach, and engagement work must be grounded in strategy: marrying our understanding of audiences with clearly identified outcomes to develop approaches for effective outreach and engagement.

Planning with the Communications Division must be included as a starting point of each plan, project, and initiative. Such planning must be focused on predefined goals, then integrated throughout the decision-making process. When Communications Division members are part of discussions early and often, we can identify and address communications implications and audience considerations resulting in more successful plans and a more positive image for Montgomery Planning.

The success of our communications, marketing, outreach, and engagement is dependent on close and cooperative collaboration between our expert communications staff and our expert planners. We want to ensure that all staff have the tools, resources, and training they need to represent Montgomery Planning in a consistent, compelling, and on-brand manner. Likewise, we need clear communication goals and desired outcomes, audience insight and data, and other information from planners to inform strategic communications development.

We ensure successful communications and efficient collaboration by using and following the following Communications and Engagement Planning Process for each plan, summarized in the below graphic.

Communications + Engagement Planning Process



3. Types of plans

Montgomery Planning works on different types of plans, projects and studies that require distinct approaches to outreach and engagement. An integral component of authentic engagement and outreach is transparency. Planners must be transparent in the purpose of the project, the assumptions and underlying data for the project, and how community input will influence and or be incorporated into the plan. A clear process for recording, tracking, and sharing input shows community members how their input influenced the plan recommendations or why it was not included in the recommendations.

Relationship Between Plans



This graphic shows Montgomery Planning's various types of plans and planning projects but also conveys that all of our work is connected. Thrive Montgomery 2050 is the overall foundation for everything Montgomery Planning does and thus informs all successive plans and projects. Countywide and master plans inform our development review, and so on. Keep in mind that decisions made during the work depicted in the smaller circles must be consistent with the policies and plans established from the plans depicted in the larger circles.

GENERAL PLAN

Thrive Montgomery 2050 is a policy document that guides, over multiple decades, how Montgomery County will fundamentally develop and change; maintain its important assets and respond to future opportunities and challenges.

FUNCTIONAL PLANS + COUNTYWIDE INITIATIVES

Functional plans and initiatives provide guidance and recommendations from a countywide perspective on large systems and topics like transportation, housing, zoning, the environment, and historic preservation.

MASTER PLANS + SECTOR PLANS

Master plans define land use policy for a specific geographic area and set a vision for the future with specific recommendations intended to help implement that vision. Sector plans include even more detailed guidelines for a particular geographic area that covers small portions of a master plan area. Most master and sector plans change land uses and require approval by the District Council and require Sectional Map Amendments that change the formal zoning maps.

STUDIES, GUIDELINES, + STANDARDS

Studies examine current conditions and offer recommendations and strategies to foster future stewardship of Montgomery County's natural and built environment and its communities. Through studies, planning staff develops insightful, understandable, and data-driven analysis and policy-relevant research on land use, demographics, economic indicators, real estate and other markets, employment, and housing. Guidelines and Standards address specific urban design and detailed planning scenarios following guidance from master plans. Montgomery Planning implements Guidelines and Standards through the regulatory cases. Montgomery Planning leadership and staff, county officials, businesses, and residents use these studies and guidelines to increase their understanding of our community and inform decisions.

DEVELOPMENT REVIEW

Every development project in the county must conform to the requirements of a master, sector, and/or functional plan as well as the zoning ordinance and forest conservation regulations. If an applicant wants to develop a property, the applicant must follow a development review process directed by Montgomery Planning and other county and state agencies, with ultimate approval by the Montgomery County Planning Board.

Thrive Montgomery 2050 - General plan

Description

Thrive Montgomery 2050 is a policy document that guides, over multiple decades, how Montgomery County will fundamentally develop and change, maintain its important assets, and respond to future opportunities and challenges. Thrive Montgomery 2050 establishes a high-level vision and goals for the county, which will then be implemented through subsequent functional plans, master plans and zoning text amendments.

Engagement target

The entire county is the outreach audience for a General Plan, so engagement must be broad and diverse. It's important to target communities that have historically been excluded from the planning process and partner with organizations that serve these communities and neighborhoods. The General Plan is broad, touching on issues ranging from transportation to the environment and housing to equity, etc. Due to the broad scope, it's also important to include issue-oriented groups and advocates, such as chambers of commerce, Audubon Naturalist Society, and Montgomery Housing Alliance.

Timeline

2+ years

Functional Plans + Countywide Initiatives

Description

Functional Plans + Countywide Initiatives span more than one geographic area, from long corridors to the entire county. They are usually thematic, addressing overarching issues or systems such as environmental resources, historic preservation, housing, and transportation networks. Examples include Historic Preservation Master Plan, Pedestrian Master Plan, Bicycle Master Plan, the update to the county's Growth and Infrastructure Policy, and Functional Plan for the Patuxent River Watershed. These plans legally amend the General Plan.

Engagement target

While countywide initiatives concern the entire county, functional plans often concern multiple communities. While it's important to create broad engagement efforts and balance geographic and demographic diversity, it's not possible to effectively target the entire county. Depending on the area and topics addressed by the plan/initiative, planners must identify primary, secondary and tertiary

populations for engagement. Primary are those most likely to feel the impacts of the plan. For example, parents were a primary participant group for the 2021 Growth and Infrastructure Policy due to the focus on school capacity issues. Parents were much more likely to be interested in policy because of talk of redistricting while the policy was developed. There can be more than one primary participant group, as long as it's a specific group, but generally shouldn't be more than two or three primary groups. Secondary participant groups can be everyone else in the community and often include influential community-based organizations and individuals. Tertiary groups may be people not in the community but who may have an interest in the topic and/or media.

Use an equity lens, especially when identifying primary participant groups. Identify not just the most engaged participants, but those who may be interested but have been left out of past discussions and those who are less likely to be already engaged through active civic organizations (e.g. parent-teacher associations or civic associations). And community-based organizations can also assist with broad outreach and engagement. For example, organizations such as the Montgomery County Council of Parent-Teacher Associations, Sierra Club of Montgomery County, Montgomery Housing Partnership, and the Montgomery County NAACP chapter can make excellent engagement partners with their wide audiences/memberships and advocacy around specific issues.

Timeline

2+ years

Master plans + sector plans

Description

Master Plans, Sector Plans, and Minor Master Plans create a comprehensive view of land use trends and future development for a specific geographic area with accompanying communities within Montgomery County. Master plans define land use policy for a specific geographic area and that sets a vision for the future with specific recommendations intended to help implement that vision. Sector plans include even more detailed guidelines for a particular geographic area covering small portions of a master plan area. Plans are location specific and recommend land uses, zoning, transportation, schools, parks, libraries, and fire and police stations. Master plans also address housing, historic preservation, pedestrian and trail systems, and environmental issues. These plans legally amend the General Plan.

Engagement target

Specific geographic communities. As these plans are place-based, it is important to engage with people in and adjacent to the community. Larger communities or places that are an activity center or destination may require more outreach beyond the plan boundary. Local neighborhood-based community

organizations, schools, libraries, recreation centers, and businesses/shopping centers are excellent partners because of their ties within the community. Countywide organizations or regional non-profits and special interest organizations may be less appropriate partners for smaller plans unless the plan touches on a relevant topic (e.g., if there are specific environmental concerns, engaging with the Sierra Club of Montgomery County).

 **Timeline**

1-3 years

Master Plan Process At-a-glance



Studies + guidelines

Description

Studies examine current conditions and offer recommendations and strategies to foster future stewardship of Montgomery County's natural and built environment and its communities. Through studies, planning staff develop insightful, understandable, and data-driven analysis and policy-relevant research on land use, demographics, economic indicators, real estate and other markets, employment, and housing. Studies are often a precursor to zoning text amendments or future plans. Studies may be thematic, geographic based, or both. Examples include the Agritourism Study, the Retail Market Study, and the Aspen Hill Vision Zero Study. Although studies may be used in development review, they do not amend the General Plan and do not have the same legal authority as plans or guidelines. They are approved by the Planning Board, not by the County Council, but the County Council may request briefings from Montgomery Planning staff.

Guidelines + standards address specific urban design and detailed planning scenarios following guidance from master plans. They increase understanding of the community and inform decisions. Montgomery Planning implements guidelines and standards through regulatory cases. Guidelines help provide information about how plan recommendations and zoning code requirements can be met, and the context for individual sites. Guidelines are typically developed as a document separate from a plan so that they can be reviewed and updated by the Planning Board as the best practices and conditions evolve over time. Guidelines are used in the review of projects; however, they do not amend the General Plan. Examples include the Complete Streets Design Guidelines, Recreation Guidelines, and individual Master or Sector Plan Design Guidelines. Guidelines offer guidance to the community, developers and/or implementing agencies. From section 7.3.4 of the Zoning Ordinance "A site plan provides a detailed overview of the applicant's development. Site plan review will be used to determine if the proposed development satisfies current laws, regulations, and this Chapter, and substantially conforms with the recommendations of the applicable master plan and approved guidelines."

A memo to the PHED committee discussing Ashton village, and whether to include design guidelines in or out of a master plan:

"This [zoning code section] appears to give equal weight to guidelines regardless of location. So, deciding where to place guidelines is not a matter of where they will be most enforceable, but rather where they make the most sense from the perspective of plan size and complexity"

Engagement target

Studies and guides can be place specific, theme specific, or both. The nature of the guide or study will determine the breadth and intensity of community engagement. For example, the Attainable Housing Strategies Study is a countywide housing study examining a controversial topic that garnered substantial

interest. Therefore, it is appropriate to engage with homeowner and renter groups as well as housing and smart growth advocates from all over the county. On the other hand, the Colocation of Public Facilities Study mainly affects government properties and functioning and raises limited public interest. While widespread outreach is not appropriate, it is appropriate to work across government agencies or service providers.

Timeline

4 months to 3 years

Development review

Description

Every development project in the county must conform to the requirements of a master, sector, and/or functional plan as well as the zoning ordinance and forest conservation regulations. *Sketch, Preliminary, Subdivision, and Site Plans* are types of applications for the development of a site. Some plans can be reviewed concurrently. All plans for development must substantially conform with relevant plans and guidelines. Master plans are the primary guides of site design and development. Applicants who want to develop a property must follow a development review process directed by Montgomery Planning and other county and state agencies, with ultimate approval by the Montgomery County Planning Board.

Engagement target

Developers are required to perform public outreach. Montgomery Planning also notifies people who live on or own property abutting or near the potential development site, as well as local civic associations. Montgomery Planning does not usually pursue engagement activities for development applications, with the understanding that it is the responsibility of the developer and/or landowner to follow engagement protocols to engage the community. Oftentimes, Montgomery Planning staff are present at these engagements. The public's main avenue for community input during development review comes at the Planning Board hearing where any interested party can submit testimony about the development project. Montgomery Planning will notify by mail abutting properties and civic associations of upcoming hearings.

Timeline

Typically, a project must be heard by the Planning Board within 90 days of application acceptance. However, the time between plans can range from just over 90 days between development applications to decades.

Project purpose

Montgomery Planning plans and studies have distinct purposes, some are more technical in nature while others involve expansive visioning. Most plans will include both technical and visioning elements. Technical elements are data-based while visioning elements are often co-created with substantial community input.

Primarily technical plans have a defined scope and aim to provide often data-driven solutions to specific issues. Visioning plans do not only rely on data alone; they are part of a comprehensive approach to meeting the needs of the community and the scope is often not determined at the project outset. As outlined below, the purpose of the project or elements in the project will affect how and whether different types of engagement and outreach strategies are used.

Technical plans or elements

Technical plans or elements primarily rely on quantitative data and technical expertise. For these elements, if the end goal of the plan is set at the beginning of the planning process, we need to carefully consider whether/how we invite engagement. While stakeholder education may be necessary, stakeholders should not be asked to provide opinions, ideas, or comments if these will not influence the discussion and development of recommendations. We damage the department's reputation and relationships if we over-promising during engagement or invite engagement with no intention of considering community input. Doing so is deceptive, demanding community investment (of time or resources) without offering genuine influence, and thus eroding trust and community capacity and desire to engage in the future. Examples of technical elements within a plan or study could be where to install a traffic light to increase safety, or stormwater management recommendations. Examples of technical plans and studies are the Corridor Forward I-270 Transit Plan and the Study of Mixed Use Development Trends.

Some appropriate forms of outreach and engagement for technical plans include

- **INFORMING** community members of the process, purpose and goals, and milestones. Informational activities may include web pages, blog posts, flyers, emails, tabling, and presentations with Q&A.
- **EDUCATING** community members about planning concepts, guiding local policies, and how data analysis contributes to decisions. Educational activities may include data sharing, videos, infographics, panels, and story maps.
- **STORYTELLING** with community members. Asking community members to share pictures, stories, and videos about themselves or the subject at hand so other stakeholders and officials can learn about the issues from a human perspective. Story-telling activities may include photo contests, interviews, and social media campaigns sharing personal stories. The purpose of these activities must be clearly communicated with participants, so that they know how their participation will inform the process. For example, if their input will be used to highlight a community strength or issue, but not inform the actual recommendations, this must be clear to the participants.

SECTION 3: TYPES OF PLANS

- **VALUES VOTING/COMMENTING** on assumptions or values that inform analysis. This allows community members to rank or contribute to values used by planners in the evaluation of options. For example, if a transit study relies on a matrix to choose the best transit option, the team may examine each option on affordability, sustainability, and equity, then community members may share which of these values are most important to them and planners potentially incorporate this into recommendations. Values voting/commenting may include ranking in level of importance and/or identifying values.

Appropriate outreach and engagement activities for technical plans may include, but are not limited to:

- Website
- Publications
- eNewsletters
- Media advisories/press releases
- Notifications of Meetings and Events
- Public meetings and other events
- Notification of public comment periods
- Educational materials
- Expert panels
- Story-maps
- Mailings
- Storytelling
- Values voting

Visioning plans and elements

Most master and functional plans are visioning plans, although they do have technical elements. The scope of visioning plans should be developed in consultation with the community. The vision for the plan and subsequent recommendations are developed through quantitative data and technical analysis as well as community input. Community members have greater influence on the recommendations of the plan than in technical plans. Stakeholders must be informed of how their opinions, ideas, or comments will be considered or incorporated into the development of the plan vision and recommendations. When presenting recommendations and draft plans, planners must clearly tell and show the community how and whether their input was considered, or why it was not.

Some appropriate forms of outreach and engagement for visioning plans include, but are not limited to:

- **INFORMING** community members of the plan process, goals and purpose, and milestones.
- **EDUCATING** community members about planning concepts, guiding local policies, and how data analysis contributes to decisions.
- **STORY-TELLING** with community members. Asking community members to share pictures, stories, and videos about themselves or the subject at hand so other stakeholders and officials can learn about the issues from a human perspective.
- **VISIONING** with community members to imagine how they want their community to look and feel in the future. These exercises inform the overall vision of the plan but can also be used to understand the strengths, opportunities and challenges in a community.
- **VALUES VOTING/COMMENTING** on assumptions or values that inform analysis. This allows community members to rank or contribute to values used in the evaluation options.
- **IDENTIFYING** issues, needs, and opportunities in the community. This may be on a specific site or topic or generally within the plan area.
- **DEVELOPING DRAFT RECOMMENDATIONS.** Community members may have solutions they want to contribute to the plan.
- **PROVIDING** feedback on recommendations and plan drafts.
- **ADVOCATING** for plan recommendations where community members share their support for recommendations or plan drafts to encourage the Planning Board and County Council to accept the plan.

Planners may employ the same outreach and engagement activities used for technical plans for visioning plans. However, visioning activities may also include

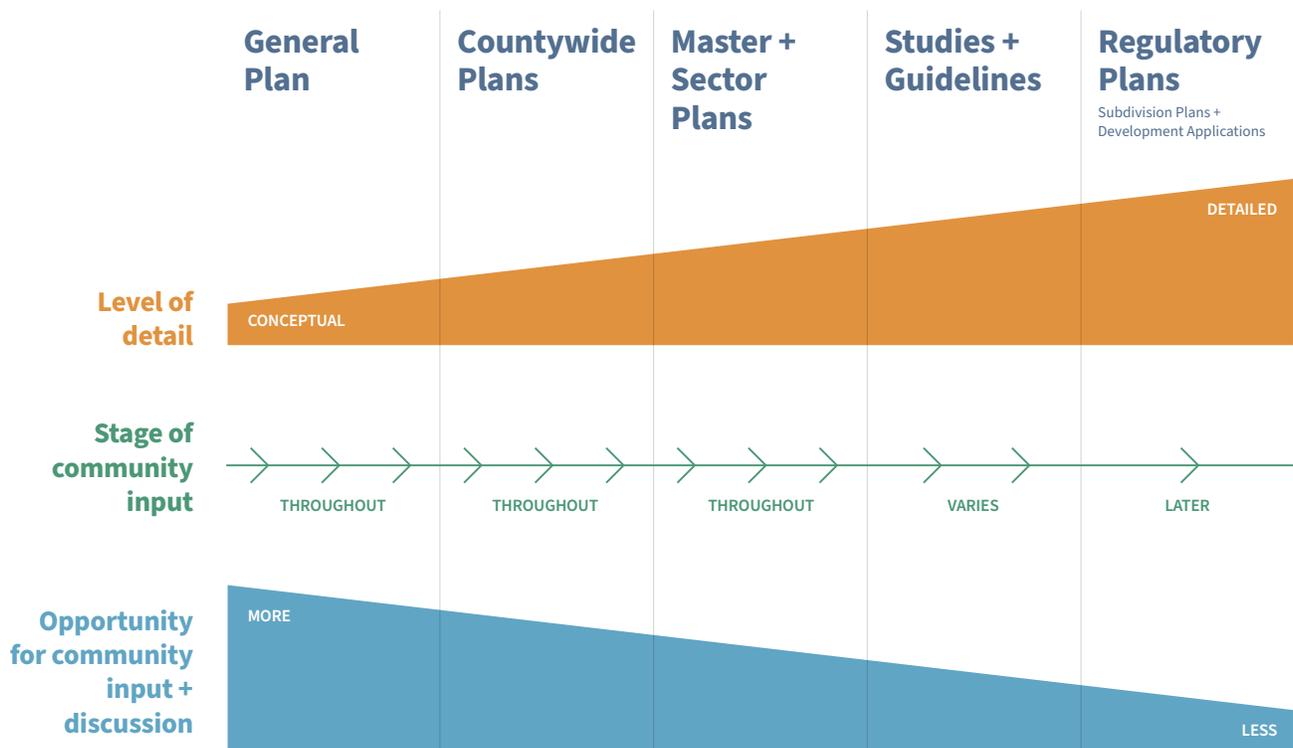
- Surveys and polls
- Focus groups
- Online problem-reporting platforms
- Idea contests
- Asset mapping
- Feedback maps
- Charrettes and other collaborative planning forums
- Study circles and deliberative forums
- Interviews
- Participatory budgeting
- Values Voting
- Small group discussions
- Walk audits

Opportunities for public input per plan type

Just as different types of plans call for different levels of detail, the stage of public input and degree of opportunity for public input varies per plan type. The following graphic, inspired by the City of Alexandria, VA,⁴ illustrates those variations. For example, a general plan requires community input from the start and the input is more comprehensive in both degree of engagement and community members engaged.

Community Input by Type of Planning Work

Note: this graphic is a broad representation of the nature of plans and community participation. More or less community input may happen at any stage of the process for most plan types. This graphic should be used as a general guide.



This graphic is for illustrative purposes only. The levels, stages, and degrees represented herein may vary given the specific goals of each plan and project.

4 City of Alexandria, VA. (2014) What's next Alexandria: Handbook for civic engagement. P 57. https://www.alexandriava.gov/uploadedFiles/special/CivicEngagement/web_boxes/WNA%20HANDBOOK%20FINAL%20reduced_3_2014.pdf

4. Equitable Outreach + Engagement

Equitable community engagement strengthens our neighborhoods, community bonds, and democratic institutions. When people participate in their local governance -- and see their feedback incorporated into plans, projects, and decisions, it can align decision makers with community members. Participation in community engagement requires trust in institutions, a belief by community members that their engagement can influence the decisions that affect their lives, and the capacity to influence decisions.

The Communications Division is building knowledge and researching best practices toward developing an equity communications and engagement plan for the department. We are currently developing a communications and engagement strategy for equity. Meanwhile, the Equitable Communications Approach document along with the below list represents a mix of Montgomery Planning's current practices toward equitable outreach + engagement and those recommended by other jurisdictions and organizations, including the American Planning Association and Government Alliance on Race and Equity. This document will be updated, as appropriate, once the Equity Communications Strategy is developed and approved.⁵



⁵ This graphic from Sustainable CT's Equity Toolkit is a good starting place for considering various community members.

1. Use research and existing knowledge of community groups to inform and develop more equitable communications, outreach, and engagement.

- Use demographic, sociographic and psychographic information about resident audiences (provided by planners and the Research and Special Projects Division) to identify and understand each plan's and project's diverse community members. Per Sustainable CT, "Think broadly to identify additional characteristics of those in your community: for example, those who are differently abled, retired or working, single or living with dependents, homeowner or renter, etc. By first identifying who lives in your municipality, you can begin to learn how different people experience the community."⁶
- Request and review audience feedback and engagement preferences.
- Develop outreach and engagement goals specific to traditionally underrepresented community members to build these relationships.
- Evaluate outreach and engagement effectiveness to inform future approaches.
- Examine current and new ways of reaching community members.

2. Be adaptable and flexible, selecting strategies and tactics based on the community's needs and preferences to ensure equitable outreach and engagement. Consider:

- Relevance and knowledge - When communicating with diverse groups, we need to be mindful that others don't have the same context or level of knowledge that we do. Their reality and experience differ from ours. We should assume that many residents are unaware of and likely don't care about what Montgomery Planning is doing. So we must position outreach and engagement in a way that is relevant to their realities.
- Make outreach simple and easy to understand, avoiding planning jargon and technical details. Engagement activities must not require prior planning or policy knowledge. If they do, provide resources that explain planning concepts and policies in a way that will make sense to non-planners.
- Literacy level - Communications will provide background for complex concepts, use images and graphics, and avoid acronyms. Additionally, staff should be available for verbal explanations and surveying as alternatives to written materials and questionnaires.
- Socioeconomic status - Event locations and timing must consider convenience for the given community as well as accessibility to public transportation, childcare, and food.
- Language - Messaging, materials, and other communication must be translated into the appropriate languages for the communities in question where limited English proficiency is greater than ten

6 Sustainable CT (2019). Equity Toolkit. p 7. https://sustainablect.org/fileadmin/Random_PDF_Files/Files_and_Resources/SustainableCT_EquityToolkit_January2019.pdf

percent. Written translation and verbal interpretation should be provided based on the prevalence of languages spoken in a given geographic area and considering areas where there are large numbers of people with low-English proficiency.

- Culture - Language translation is just one part of effectively communicating with Montgomery County’s multicultural population. Communication must also consider cultural norms such as previous experience with public participation and democratic processes, comfort sharing ideas in public, gender roles, and community methods for decision-making.
- Physical and mental ability - All outreach and engagement, as well as access to events and services must follow the guidelines of the Americans with Disabilities Act (ADA).
- Age - Whether you’re trying to reach youth or senior citizens, community members of different ages have different needs. For example, it may be easy to reach younger audiences on specific social media platforms like TikTok, while older residents may only be on Facebook or not online at all. Older community members may also need accommodations for physical challenges.
- Local history - According to the State of California Governor’s Office of Planning and Research, “Certain communities may have participated in previous outreach efforts that did not result in change. Over time, either not being included or participating and/or not feeling utilized may affect future participation. Understanding the local context is helpful prior to beginning outreach. Fostering dialogue around racial inequities that have existed in the land use context can be challenging. Jurisdictions have started to engage with skilled facilitators to have conversations that advance participation and engagement opportunities.”⁷

3. Integrate equitable outreach and engagement in the planning process.

- Understand the communications context.
 - » Identify community groups.
 - » Discover past/existing inequities.
 - » Work to understand community members’ core values and identify which values are shared with and among the larger community.
- Perform an assessment to identify capacity, limitations, history, and power dynamics.
 - » Consider past public investment in the area when determining capacity.
 - » Identify traditional decision-makers, then include more diverse voices and influencers.
- Ensure clear and coordinated internal communications as well as outreach and engagement training in the planning process for consistency and accuracy of messaging and engagement.

⁷ State of California Governor’s Office of Planning and Research. Community Engagement and Outreach: Designing Healthy, Equitable, Resilient, and Economically Vibrant Places. p 33. https://opr.ca.gov/docs/OPR_C3_final.pdf

- Clearly identify the vision and desired outcomes of communications, outreach, and engagement at each stage and phase of a plan or project.
 - » Develop a plan to get from the current state to the desired future, including identifying opportunities and obstacles.
 - » Define what we're asking of community members and/or inviting them to do at each stage.
 - » Design outreach and engagement appropriate to participation at each stage of planning.

4. Create messaging that incorporates equity elements -- explaining why equity is important to address as part of this plan/project, the context, who is involved, and why people should care based on their values. Consider:

- what stories and data we have to explain the problem/inequities we're working to overcome.
- the pragmatic benefit of supporting equity as part of a project or plan.
- the historical context specific to a plan/project.
- what values are held by community members and how what we're doing relates.
- how we will handle/overcome skeptics and objectors.

5. Build trust, collaboration, and connection across diverse communities.

- The Communications Division will develop branding and marketing campaigns to increase public awareness of Montgomery Planning's role in the county and our work's impact on the lives of all residents. This includes planning ongoing outreach moments and events beyond those scheduled as part of specific plans or projects.
- Acknowledge and address past inequities, preferably those identified by community members, and specify how Montgomery Planning will avoid repeating the wrongs of the past.
- Form and strengthen relationships with community-based organizations, community leaders, and other influential individuals who have established trust with diverse community groups.
 - » Develop protocols in consultation with community leaders to engage community members regularly, even when plans or projects are not underway in their neighborhoods.
 - » Help to build civic capacity to ensure true neighborhood representation.
- Avoid duplication of efforts. Identify and collaborate with Montgomery County government, community-based groups, and other organizations already engaging the community and work to collaborate.
 - » Align efforts where possible to bring together varied perspectives.
 - » Partner with organizations by co-hosting listening sessions and events, providing content for their events and communications, and resourcing their staff with tools like social media posts, meetings in a box, and talking points.

- Community engagement includes the promise that the community’s contribution will be thoughtfully considered. Communicate to participants how they can expect their input to inform decisions or processes.
 - » Develop guidelines for recording and processing community feedback.
 - » Design a simple guide to the planning process to inform community members about engagement opportunities.
 - » Create feedback loops and inform community members about how their input was considered and where it is reflected in analysis, recommendations, and plans.
- Only engage the community when their input and feedback can be authentically incorporated in and make a difference to the planning process. Do not undertake community engagement:
 - » when decisions have already been made and there is no room for change;
 - » to check a required box without the intention of using public feedback to shape the plan or project; and/or
 - » when promised outcomes cannot be delivered.

6. Meet people where they are and make it easy for them to participate.

- Tour neighborhoods with community members to gain first-hand knowledge of conditions and concerns.
- Determine where community members already gather, then go there for engagement. This might look like planners doing intercept interviews outside of a grocery store, metro station, beauty salon, or laundromat or it might look like meetings that are part of other already planned gatherings such as church groups, PTA meetings, or HOA meetings.
- Consider the timing of meetings and events relative to school, work, or mealtimes; the need for provision of childcare; and the importance of offering meals or food.
- Ensure that meetings, whether in-person or online, are accessible to all people, regardless of physical ability. Consider the meeting location, room setup, meeting content, and any auxiliary aids or services needed.⁸
- Be aware of non-apparent disabilities. According to the Institute for Local Government, “Increasingly, people with chronic illness, chronic pain, chronic fatigue conditions, and mental health conditions are starting to self-identify as having disabilities; while some of these people may not “look” like they have disabilities, many of them still have access needs or barriers to civic participation.”⁹

8 For more information, see U.S. Department of Justice, Civil Rights Division, Disability Rights Section (2009). Accessible Information Exchange: Meeting on a Level Playing Field. <https://www.ada.gov/business/accessiblemtg.htm>

9 Institute for Local Government. Increasing Access To Public Meetings And Events For People With Disabilities. p 1. https://www.ca-ilg.org/sites/main/files/file-attachments/increasing_access_to_public_meetings_and_events.pdf?1497551868

- Consider alternatives to in-person meetings as appropriate to relevant community groups such as telephone town halls or virtual meetings.

7. Provide adequate time and resources to increase capacity to plan for and execute equitable community engagement activities.

- Coordinate closely with the Communications Division when setting project and plan timelines to determine time and resources needed for equitable communications, outreach, and engagement.
- Plan for and provide sufficient and appropriate staff and budgetary resources necessary for equitable engagement.
- Allocate appropriate translation, interpretation, media, materials, and outreach resources based on the plan or project's audiences and significance for the community as well as the community's trust in and past experience with Montgomery Planning and/or similar projects.

8. Take a goal- and data-driven approach based on community feedback.

- Develop tools and mechanisms for evaluation and reporting.
- Evaluate communications, outreach and engagement strategies on an ongoing basis and celebrate progress with the community.
- Develop a system for consistently learning from community member response and feedback.

5. Montgomery Planning's Master Plan Community Engagement Process

This section introduces and explains Montgomery Planning's community engagement model for master plans and accompanying resources, first for the big picture engagement model, then for each subsequent stage. Each sub-section:

- shows the model graphic (first overall, then per-engagement phase);
- explains how engagement goals and levels of public participation vary at different stages of the plan and phases of engagement; and
- provides resources such as
 - » overall engagement basics,
 - » an engagement checklist for success,
 - » engagement intake questionnaires, and
 - » phase-specific engagement activities.

Section V offers best practices and tips for equitable outreach and engagement. The next update to this engagement guide will also include strategies for identifying, reaching, and engaging various community groups.

To best understand and use the community engagement model, it is helpful to understand a few things:

There are many models for community engagement.

While developing this guide, the Communications Division studied multiple models for community engagement from other planning agencies; from other types of government agencies, cities, or municipalities; from research and consulting groups doing planning work; and from other industries such as healthcare and social enterprise. A list of models reviewed and referenced is in Appendix B.

The model set forth in this guide draws inspiration from all of those studied, but especially the International Association for Public Participation's (IAP2) Public Participation Spectrum, Public Agenda's Strengthening and Sustaining Public Engagement: A Planning Guide for Communities, the City of Fort Collins, CO's Public Engagement Guide, the City of Alexandria, VA's What's Next Alexandria: Handbook for Civic Engagement, Health Canada's Public Involvement Continuum, and the National Coalition for Dialogue & Deliberation's Resource Guide on Public Engagement.

Montgomery Planning cannot legally do community-led planning.

When community members are interested and involved in the planning process, we can develop plans that better reflect the community's needs and values. That's why Montgomery Planning highly values the time, thought, and insight community members provide through their engagement.

However, unlike some government agencies, Montgomery Planning cannot allow community-led decisions in the planning process because the Planning Board cannot delegate any of its land-use decision-making power per State law.

While many models of participation include as a goal collaborative decisions with the community or community-led decisions, ultimately Montgomery Planning's engagement can only result in consultative decisions. These are decisions made by the Planning Board and, ultimately, County Council, but involve and are informed by community input.¹⁰ Likewise, the community's role in decision-making dictates the type of engagement that is appropriate. For example, since Montgomery Planning cannot invite community-led decisions, any type of engagement that implies or promises any type of community ownership in the decision-making process is not appropriate.

For these and other reasons, it is imperative that Montgomery Planning track and demonstrate where and how recommendations emerged so that decision makers (Planning Board and elected officials) understand the community's perspective. It is equally important to show the impact of the community's participation to all involved.

We must tailor strategies and tactics to the engagement stage and audience.

A primary goal of developing the engagement model is to help Montgomery Planning staff tailor strategies and tactics to the appropriate engagement stage. Engagement is not a "one size fits all" activity. As the model depicts, there are different goals and levels of participation at each engagement phase and plan stage. It follows, then, that different engagement strategies and tactics are more or less appropriate and effective at each phase and stage. The engagement planning process challenges us to consider these differences to invite the most effective and efficient type of engagement depending on where we are in the engagement process.

¹⁰ City of Fort Saskatchewan, Canada (2012). Public Engagement Framework. pp 5-7. <https://www.footsask.ca/en/your-city-hall/resources/Documents/Report-Plans-Studies/Public-Engagement-Framework.pdf>

We also need to understand our stakeholders for each project and at each stage so that we may tailor outreach and engagement activities to them. Understanding the demographics, psychographics, and outreach and engagement preferences of the community members who will be affected by the plan is imperative to designing outreach and engagement that will attract their attention, motivate them to participate, equip them with the information they need to be informed participants, and meet them where they are.

Consider different levels of readiness and comfort among community members at any given time.

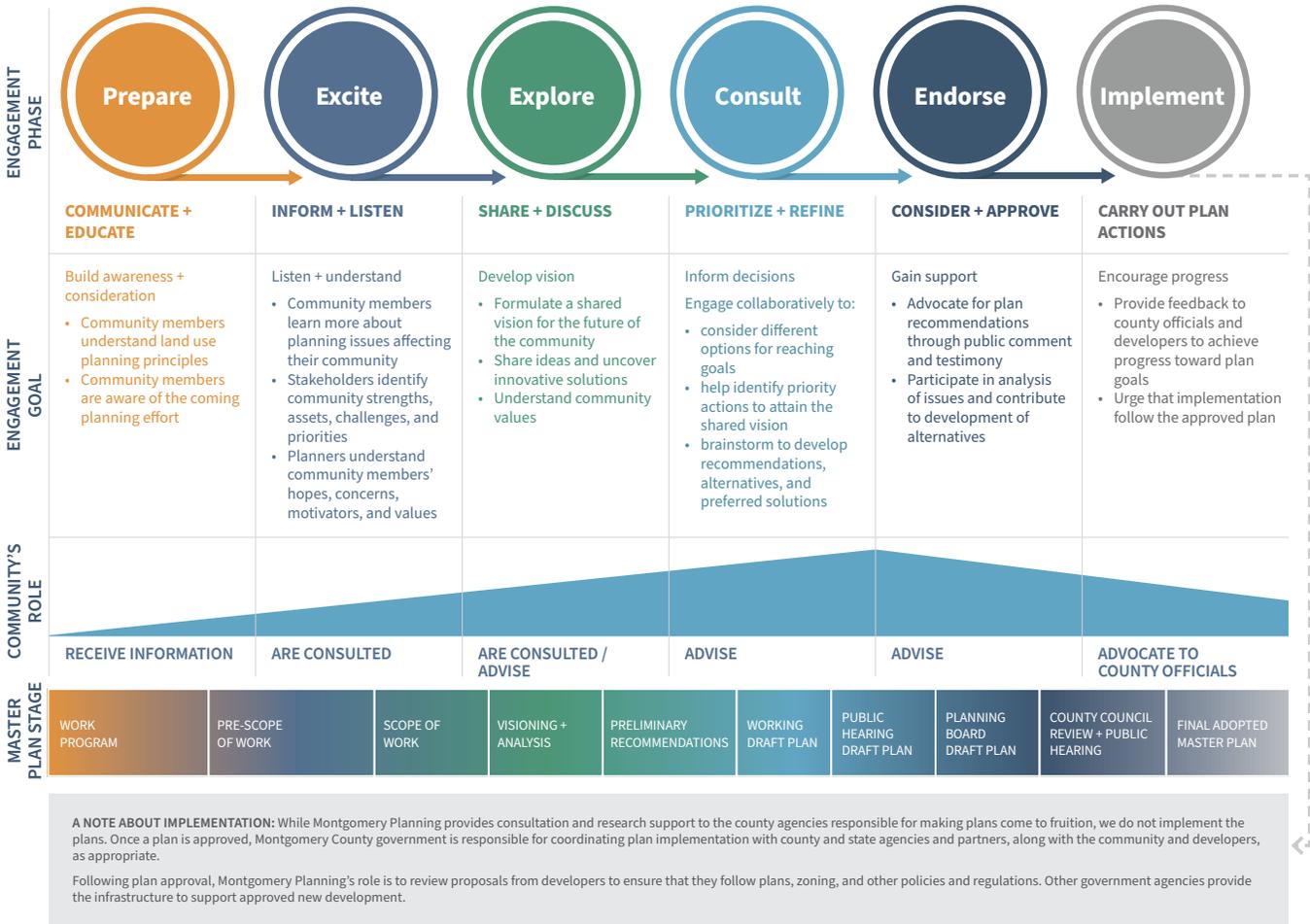
While Montgomery Planning's Community Engagement Model depicts a relatively neat and linear process, reality is messier. Some community members will be with you from day one, soaking in the information and education provided, and participating in engagement activities from the start. Others will join the process when it's already underway. This means that informational and educational activities never stop and planners must consider the knowledge and participation level of various community members at any given point of the process. For example, community members who have been aware of and participating in the process from the beginning won't need as much background information once you get to the "Consult" phase of engagement. Others may have just learned about the plan and need to be "caught up" so they have the same knowledge and context as other community members. In short, participants need to be able to jump in or out of the process without barriers or stress and it's incumbent upon the planning team, in collaboration with the Communications Division, to make this happen with thoughtful communications.

Likewise, planners must think about what information and education is needed throughout the planning process. This involves considering what planning topics or other elements are being analyzed and discussed, then determining whether it's reasonable to assume community members understand these topics or if education is needed.

Planners must also consider overall familiarity and comfort with the planning process when planning engagement. For example, if a master plan's geographic area has a large immigrant community, planners must first work to understand the cultural norms around public engagement. If the culture is one where speaking up/out in public is seen as rude or otherwise undesirable, design engagement that honors this and find ways for those community members to participate in a way that is comfortable for them.

Engagement: Big Picture Model

Montgomery Planning Master Plan Engagement Model



The engagement model illustrated above depicts six phases of community engagement, each of which roughly align with one or more stages of the master planning process. Goals are included to correspond with each engagement phase, as are the appropriate levels of community participation. In most cases, goals and activities (e.g., communicate and educate) may be carried forward to the next phase. For example, awareness and consideration is a goal toward which to strive throughout the process especially when, as previously mentioned, you may have community members joining the process at a later phase than “Prepare.” Likewise, it’s wise to inform and listen throughout the process.

The most intensive engagement occurs from when the scope of work is approved through when the Planning Board draft plan is ready. It should also be noted that, given Montgomery Planning's limited role in plan implementation, our community engagement decreases greatly once the plan is approved and adopted. However, it is becoming increasingly apparent that continued outreach to community members with updates on plan progress are helpful for a number of reasons, which are listed in section Engagement: Implementation Phase.

Non-negotiable elements

Non-negotiable elements are parts of the plan that the community will not have influence over during the plan process. For technical projects, this may be most of the plan because recommendations will be decided through data analysis and planner/topical expertise. Many visioning plans also have non-negotiable technical elements such as those guided by legal requirements or data. Planners must communicate what and why there are elements of a plan that are beyond the influence of community input.

In addition to technical and legal non-negotiable elements, Montgomery Planning has non-negotiable values in all of our work such as a commitment to environmental sustainability, Vision Zero goals, and equity. These values may mean working towards specific goals (e.g., reducing vehicle miles traveled, producing more attainable housing) in the plan. While certain values and goals are non-negotiable, how the plan achieves these goals may be negotiable and informed by community input. Planners must identify and communicate any non-negotiable values at the beginning of the plan process (e.g., "we will increase housing opportunities, density will increase through this plan") and let stakeholders know what they can influence (e.g., where the density will go or the heights of buildings).

Resources

Overall engagement basics/101

- Know your community
 - » Build a demographic profile of the community to help you identify who is in the community.
 - » Don't jump to tactics before understanding who comprises the community and clearly stating your engagement goals and desired impact of engagement activities.
 - » Consider stakeholders beyond residents such as those who work in and visit the plan area, business owners, and others who have an interest in the plan area.
 - » Identify and build relationships with relevant community groups, businesses, leaders, and influencers.

- Be inclusive and equitable
 - » Disseminate information in easily accessible ways, locations, and formats for stakeholders.
 - » Consider cultural preferences/barriers to participation, literacy, language, age, ability and realities of daily lives (e.g., when they're working/likely to have family responsibilities, ability to get to in-person events or meetings, internet access, etc.)
 - » Address differences in experience, knowledge, and historical power early and often.
 - » Consider the experiences and background of people staffing engagement activities. Whenever possible, staff engaging with community members should share background and experiences with the given community group (e.g., shares the same primary language, parents engaging with parents, a bus commuter engaging with transit riders). Note: While this is the ideal, it may not always be practically possible given the composition of the planning team and/or the availability of staff who share background and experiences with the given community group. Discuss with your supervisor how to appropriately staff in consideration of equity. Also be mindful not to put inequitable extra work on staff who are most similar to specific community groups.
 - » Check for your blind spots. Ask colleagues and community partners if there are people, resources, and support you're missing.
 - » Choose inclusive language that makes people feel welcome regardless of their race, immigration status, gender, and sexual orientation. To avoid unintentionally including insensitive or offensive language or questions, have multiple people review any outreach or educational materials as well as presentations, facilitation guides, interview questions, and the like.
- Make it easy
 - » Meet people where they are – in their homes, through organizations to which they're connected, at recreation activities, etc. – and make engagement and participation as easy as possible.
 - » Use plain language and relate the information to the needs and experience of the stakeholders.
 - » Leverage existing online and in-person communities.
 - » Provide options for different levels of interest, time commitment, and depth of knowledge.
- Create a transparent process
 - » Develop a shared understanding of the project and the process. Consider that people are joining the process with different levels of understanding and experience.
 - » Use plain language, avoiding jargon, and provide explanations for important terms and concepts that are not familiar to your stakeholders.
 - » Create clear expectations and understanding for the purpose of the plan and the engagement activities, the timeline, and the role of the participants.
 - » Match the type of engagement to the engagement phase in the plan process and the targeted population(s).

- » Be transparent about how community input can influence outcomes and where it can't. Clearly communicate with participants, so that they know how their participation will inform the process.
- » When possible, provide information in advance of activities and decision-making.
- » Evaluate and adapt. Be flexible with your engagement plan, regularly evaluate and reassess the engagement plan and activities to ensure you're meeting your goals.
- » Ask how the process or activity can be improved.
- » Share learnings about the community and the process with other planners and Communications Division staff.
- » Accept the messiness of engagement. Community members may come to the process with existing grievances and frustrations, may disagree with Montgomery Planning's values or other community members' opinions, or may misunderstand the process or topics being covered. Other community members may come to the process with tremendous enthusiasm but are in need of education about the process and what's being considered. All of these situations are opportunities to better understand the community, to clear up misunderstanding or misinformation, and, at times, to explain why Montgomery Planning holds the values we do. Some of these situations actually offer Montgomery Planning an opportunity toward righting the wrongs of the past in terms of community equity.
- Build trust and respect
 - » Approach meetings and conversations as opportunities for mutual learning and collaborative problem solving.
 - » Build partnerships within the community, prioritizing organizations, businesses, institutions, leaders, and influencers that serve or represent historically marginalized groups.
 - » Be responsive to your stakeholders, whether people have questions related to the plan or concerns and complaints.
 - » Don't waste people's time. Individuals and organizations have limited time and resources. Whenever you ask them for their participation, it must be because it will meaningfully impact the plan.
 - » Track and incorporate feedback into plan recommendations and process, report back to stakeholders, and share learnings with planner and communications colleagues.
 - » Frame meetings and engagement activities as problem solving opportunities and a collaborative effort.

Overall engagement checklist for success

- Develop a communications and engagement plan in partnership with the Communications Division.
- Identify external resources needed (Communications Division, contractors, agency partners) and plan accordingly.
- Start a messaging and/or FAQ document to create initial messaging that can be used for web page content, eletters and social media posts.
- Create a website and eletter list, consider other mediums for distributing updates.
- Assign roles for each event or activity, outlining responsibilities for before, during and after the event/ activity.
- Check with your supervisor to see if there are existing relationships or ongoing conversations with any community organizations, businesses, and individuals before contacting them.
- Update messaging and talking points as you work through different phases of the plan.
- Evaluate engagement activities in real time and after their conclusion.
- Adjust the engagement plan based on feedback, community preferences, engagement phase, and successes and obstacles.
- Create mechanisms for tracking and responding to people's questions, concerns, and ideas.
- Route questions, concerns or suggestions to other agencies when appropriate and then follow up.
- Document and share outcomes and feedback from meetings and other engagement activities.
- When planning events, check-in with partners and their event calendars to make sure they are not overlapping.

Engagement: Prepare Phase

Engagement Phase Elements

Corresponding Master Plan Stages:
Work program and early stages of pre-scope of work.



COMMUNICATE + EDUCATE

GOAL: BUILD AWARENESS + CONSIDERATION

- Community members understand land use planning principles
- Community members are aware of the coming planning effort

MONTGOMERY PLANNING'S ROLE

- Educate community members on planning
- Build awareness + understanding of the coming plan process
- Identify + build relationships with community partners + influencers
- Gather, organize, + process information

COMMUNITY'S ROLE

- Receive new information
- Ask questions

PROMISE TO THE COMMUNITY

- We will keep you informed

SAMPLE ACTIVITIES + TOOLS

- Resources such as talking points, fact sheets, reports, and web pages
- Sending eNewsletters
- Informational sessions or calls
- Internal charrettes

WHEN TO USE

- Early in the process, when the work plan is under development
- Broad community opinion + support are needed
- Factual information is needed to pique interest + prepare for involvement

The Prepare Phase is more about outreach than engagement. It's part of the engagement model because it's a necessary prerequisite to successful engagement at later phases. Building awareness of the plan and consideration by community members of participating in the planning process starts here and should continue throughout most of the planning process. In fact, building awareness and education should never stop, and the Prepare phase exists partially to remind us that, just because a plan is complete, we must never stop working toward helping community members understand what we do and how and why it's important to their lives.

It's also important that community members entering into the process during later phases have the same background and educational information as those who have engaged from the beginning. So taking some time before a planning project officially begins to discuss the communities affected and their likely knowledge (or lack thereof) of the planning process is of great help in identifying the educational and outreach messages and materials that will be most appropriate for this plan. This work continues

throughout the planning process and planners and communications staff must further develop, expand on, and revise informational and educational materials as needed, such as when a planning concept needs to be introduced and explained.

The Prepare phase is a good time for planners to conduct internal research/have internal conversations about the plan and identify, gather, and process preliminary information. For engagement, this might include collating any existing community and demographic information and identifying what else will be needed. This is the ideal time to begin identifying potential community partners and influencers, whether they be community-based organizations, nonprofits, businesses, individuals, or other government agencies. Consider:

- Who works in and knows these communities well?
- Do they have information that may support successful engagement?
- What relationships already exist within Montgomery Planning or partner agencies that might be leveraged to build deeper and more successful relationships?

Finally, while intense public interest is unlikely at this phase, it's important to be sure that staff anticipate and are prepared to respond to potential questions from community members.

Resources

Prepare engagement phase checklist for success

- **Create a demographic profile.** Collaborate with the Research and Strategic Projects team to create a demographic profile that illustrates the unique characteristics of the population in the project area. The demographic profile will help identify target populations and considerations for engagement, such as translation, housing status, and ages. Think beyond basic demographic data to make meaning of the data to help guide how to best reach and support community members. For example, if the area has a lot of single parent households, childcare needs to be considered for events. Consider including surrounding areas in your profile, especially if those areas include historically marginalized or excluded populations.
- **Develop a psychographic profile.** A psychographic profile illustrates the common preferences, habit, values and lifestyle choices, segmented by various demographic characteristics. A psychographic profile contains information about how people most likely prefer to receive information and participate. The profile can help determine the best strategies and tactics for reaching the target participants. *Montgomery Planning does not currently have psychographic data. It will need to be collected and analyzed through a coordinated effort by Communications, Research and Strategic Projects, and the area planning divisions.
- **Catalog community organizations, businesses, and influencers.** Create a running list of religious institutions, schools, non-profits, small businesses, and major employers serving your project area. Include on that list influential individuals, bloggers, and the like active in the area. Identify if there are

populations that are not served or represented by these groups and develop strategies for reaching those populations. Consider contacting key potential partners to let them know the plan is coming. Explain the process and the project and see if they are willing to collaborate and how they and their community would like to stay involved. Commit to providing more information and following up with a more concrete ask, based on your conversation, at a later point in the process. Aim to gather information on the community groups they serve. These organizations may have valuable insight on outreach and engagement preferences, as well as community values, wants, and needs.

- **Introduce the project.** Prepare materials that introduce the community to your project (purpose, timeline, importance). Consider ways in which to level the playing field between community members who have more experience and understanding of the Montgomery Planning and the planning process and those who are new to the process. Invite people to stay in touch and ask questions through the mechanisms defined in the engagement plan, such as an eLetter, “office hours,” and social media.
- **Identify community gathering spots.** Community gathering spots may be public or private, they are places where people meet and exchange information, such as coffee shops, parks, shopping centers, recreation centers, libraries, etc. The demographic profile can help guide which places to prioritize; for example, if there are a disproportionately large number of seniors, you may want to target places that offer senior services.
- **Track feedback.** Think about what information you want to collect as you embark on the engagement process. Consider if there is information that can contribute both to the current plan, as well as Montgomery Planning’s understanding of the needs, values and preferences of community members. Consider how you will track feedback and information you receive from engagement efforts.

Phase-specific engagement activities

Engagement activities in this phase are geared towards introducing the project, Montgomery Planning, and the planning team to the community.

- Eletter announcements and list-development
- Sending flyers, fact sheets, infographics, and webpages
- Developing informational communications for community partners, organizations, and influencers.
- Letters to, calls or meetings with organizations, businesses, community groups
- Information sessions or pop-ups to introduce the project

Engagement: Excite Phase

Engagement Phase Elements

Corresponding Master Plan Stages:
Pre-scope of work and early stages of scope of work development.



INFORM + LISTEN

GOAL: LISTEN + UNDERSTAND

- Residents learn more about planning issues affecting their community
- Stakeholders identify community strengths, assets, challenges, and priorities
- Planners understand community hopes, concerns, values, and motivators

MONTGOMERY PLANNING'S ROLE

Share information + education on plan process and participation

- Define what's at stake and why/how it impacts the community
- Explain particular planning concepts and how they relate to the recommendations

Explore, seek info, and listen

- Create space for people to share their thoughts, feelings, and perspectives
- Listen to understand stakeholders and encourage new insights and connections
- Identify the diverse hopes and concerns of the involved communities

COMMUNITY'S ROLE

- Engage to be informed and to influence the scope of work
- Share community interests

PROMISE TO THE COMMUNITY

- We will keep you informed and will listen to identify issues so the scope reflects community concerns + opportunities
- We will try to reach community members in the ways most convenient and accessible to them

SAMPLE ACTIVITIES + TOOLS

- Connect with neighborhood leaders and CBOs
- Collect emails
- Education + training on who Montgomery Planning is, what a master plan is, and the plan itself via events, activities, content marketing, etc.
- Input via group discussions (community/neighborhood meetings, charettes, consultative workshops), questionnaires, interviews, event tabling, visual recordings, office hours, roundtables, and more

WHEN TO USE

- Broad community education and input are needed
- Stakeholders see the need to connect but are wary
- Decisions have not been made
- Before developing the vision
- Community members need info to prepare for further involvement

During the Excite phase of engagement, planners begin to consult community members and use their input to help shape the scope of work and to build awareness of community members' realities as well as outreach and engagement preferences. Engagement is aimed at understanding community members' needs, wants, hopes, and concerns as well as community strengths, assets, challenges, and priorities. While the focus of this phase is listening and understanding, planners should also continue to inform community members about planning issues affecting their community and encourage their continued participation in the plan's development.

As with all phases, planners must be clear about the purpose of engagement activities and how the information community members share will be used to inform the plan. During the Excite phase, it is especially important that community members' outreach and engagement experiences are positive to

build trust and get community members excited about future involvement and likely to encourage friends and neighbors to get involved.

This is also a time to connect with and engage community-based organizations, community leaders, and other influential community organizations and individuals around the same topics raised to community groups. These organizations and influential individuals can also be helpful in identifying community groups and methods for reaching and engaging with them, as well as getting the word out about the plan.

Resources

- Leveling the discrepancies in understanding of processes and background information. As stakeholders participate in deeper forms of engagement, provide the information and support so that all can participate equitably.
- Create and look for opportunities for mutual learning.

Excite phase-specific engagement checklist for success

- **Create an outreach and engagement outcomes statement.** Describe what outreach and engagement success will look like, what do you hope to achieve. A successful outcome will be defined differently depending on the type, purpose, scope, and timeline of the plan.
- **Identify strategies for pre-scope of work outreach and engagement.** Based on existing knowledge and conversations about communities to engage, plan goals, environmental and market factors, and likely opportunities and obstacles, identify strategies and priorities for outreach and engagement leading up to scope of work approval. Work with the Communications Division and consider desired outcomes, communities affected by the plan, available resources, and schedule.
- **Develop a pre-scope of work implementation plan.** The pre-scope of work implementation plan, created in consultation with the Communications Division, defines the work plan for outreach and engagement through, and sometimes immediately after, the scope of work approval.
 - » Defines tactical approaches to reaching and engaging community members.
 - » Creates talking points. Have an “elevator pitch” that describes why Montgomery Planning initiated the project, why it matters to your audience, and how they can get involved.
 - » Establishes responsibilities and schedules for early engagement materials and activities.
 - » Confirms budget, human, and other resource needs.
- **Connect with community leaders.** Contact the community organizations, influencers, and businesses on your list. After you have introduced them to the plan, explore opportunities for future collaboration. Learn about their concerns and priorities and how they would like to communicate and collaborate (i.e., send info to share via their communication channels, present or table at an event, etc.). Discover who they represent or serve and if there are special considerations or supports needed for engagement (i.e.,: if an organization works primarily with night workers, alternative scheduling

for meetings may be important). Remember, lasting relationships are mutually beneficial, so do your homework about these groups and their missions/purpose, then think about what Montgomery Planning might offer or how sharing about the plan helps them achieve their mission. Check in with the Master Plan Supervisor before contacting large or countywide organizations. It's best to coordinate communications if Montgomery Planning is involved in ongoing discussions with certain groups.

- **Raise awareness.** Share information about Montgomery Planning and about the plan. Provide education about what Montgomery Planning does, what a master plan is, and the purpose and timeline of the plan.
- **Distribute data and analysis.** Share the data you are gathering and the analysis you are performing with the community, bringing them along throughout the process. Create space for asking questions and proposing other areas of inquiry.
- **Hold a kickoff event(s).** A kickoff event announces the plan to the public and the real beginning of the engagement process. Invite the community to come together virtually and/or in person so they can hear from you, you can hear from them, and they can hear for one another. While it's desirable to have more than one format (virtual/in person/phone) to meet the needs of community members, resist having many events as it may overwhelm and confuse participants.
- **Gather feedback.** During the Excite Phase, Montgomery Planning will be pushing more information out than taking it in, but each interaction is an opportunity for mutual learning. For any event or activity there must be clearly defined roles and mechanisms for collecting and recording feedback (i.e. a notetaker in a meeting, a post-it note comment board).
- **Track feedback.** Create a system for tracking and responding to questions, comments, and ideas from the community. Tracking feedback is a coordinated effort that includes gathering, recording, and responding to feedback. Feedback will grow throughout the project process, tracking community input is crucial to maintaining transparency, demonstrating community influence, and building trust. All staff working on community engagement should understand the process for tracking feedback and their roles and responsibilities. The team must use consistent terminology when recording and tracking feedback so it's easier to analyze in later stages.
- **Visualize feedback.** Demonstrate that feedback is being heard and recorded. Visualizing can happen during events or through activities (ie; writing comments on a poster board, or marking comments on a map). Feedback visualization should also be shared post-event or activity through website, newsletter, or other mediums.
- **Ask about preferences.** If people attend an event or participate in an activity, you should ask about their preferences for engagement and outreach going forward. Distribute a simple survey that allows people to quickly let you know their preferences or include these questions on any other survey you may employ during the planning process.

- **Evaluate engagement.** Evaluate engagement activities to ensure you are meeting your engagement goals and impacts. After each activity, identify obstacles to participation (language, childcare, accessibility) and the supports or resources that can address them in future engagement activities. Examine if the participants reflect the target population, who is being left out and why.

Phase-specific engagement activities

- Collect community information through questionnaires, email, or text list sign-ups
- Education + training on who Montgomery Planning is, what a master plan is, and the plan itself via events, videos, content marketing, etc.
- Input via group discussions (public/neighborhood meetings, consultative workshops), questionnaires, interviews, event tabling, visual recordings, office hours, roundtables, office hours (reserved time virtually, by phone or in-person) for community members and more

Engagement: Explore Phase

Engagement Phase Elements

Corresponding Master Plan Stages:
 Scope of work, visioning + analysis, and part of preliminary recommendations development.



SHARE + DISCUSS

GOAL: DEVELOP THE VISION

- Formulate a shared vision for the future of the community
- Share ideas and uncover innovative solutions
- Understand community values



MONTGOMERY PLANNING’S ROLE

Engage community members to discuss and evaluate feasible vision options

- Use community input to help define the plan issues and opportunities
- Provide balanced + objective info to assist the community in understanding problems, opportunities, and alternatives
- Create space for people to share their thoughts, feelings, and perspectives while encouraging new insights and connections
- Work directly with the community to ensure their concerns and aspirations are consistently understood and considered



COMMUNITY’S ROLE

- Engage openly to help define the vision and find solutions
- Share input with the entire community in mind
- Encourage neighbors and other stakeholders to participate



PROMISE TO THE COMMUNITY

- We will use the community’s input to inform the plan vision and provide feedback on how community input influenced decisions

SAMPLE ACTIVITIES + TOOLS

- Ideation and stakeholder dialogue via community meetings, pop-ups, graphic recording, questionnaires, workshops, community and stakeholder interest group meetings, roundtables, office hours, etc.
- Use prioritization and tradeoff exercises as well as map feedback and interactive community planning platforms

WHEN TO USE

- Seeking to shape a shared vision
- Opportunities for shared agenda setting + open time frames for deliberation on issues
- Soliciting + testing community and other stakeholder ideas
- Involved individuals + groups will likely be affected by the outcome
- Encourage discussion among and with stakeholders

The Explore phase focuses on developing a shared vision for the future of the community. Since visioning involves surfacing the community’s values, careful and skilled facilitation is especially important during the Explore phase to create a comfortable and safe environment for community ideas and input. In addition to developing the vision, community input during this phase also serves as beginning exploration of possible preliminary plan recommendations.

It may be useful to first engage community groups and influential individuals to get a feel for the “pulse” of the community on whatever issues the plan process is surfacing so that you are well prepared for any contentious topics. These community partners can also help to encourage participation and help

Montgomery Planning develop engagement opportunities that are suitable and appropriate to diverse groups within the community.

Information and education remain important components of this engagement phase, when it is particularly important to provide balanced and objective information to assist community members in understanding problems, opportunities, and alternatives, all while listening to their ideas on the same.

Throughout the engagement process, planners must identify appropriate moments for sharing and discussing with the community how their input and feedback is being used thus far. People are much more likely to continue participation if they know that their input is having an impact.

Resources

Explore Phase-specific engagement checklist for success

- **Develop a strategic communication and engagement plan with the Communications Division.** The communication and engagement plan lays out the goals; strategies; messaging and visuals; and related tools, tactics, responsibilities, and timelines for achieving the defined engagement goals and impact. Work the Communications Division to develop a strategic approach to engagement which considers available data and knowledge about communities affected by the plan, as well as the obstacles and opportunities presented by that data and knowledge. The plan must be revisited before advancing to each successive engagement phase and updated as needed.
 - » Define engagement goals. Considering the unique characteristics, history, and special needs of the community, define the engagement goals and develop an impact statement that answers: what are your desired engagement impacts? Planners must use the outreach and engagement outcomes statement to guide their engagement planning and decisions, adjusting and updating as needed throughout the plan process. Make sure they align with the input and information from community leaders and individuals.
 - » Specify tools and tactics to reach target audiences based on demographic and psychographic data of the plan area, as well as desired outcomes.
 - » Outline a detailed timeline and schedule including budget and human resources needs, proposed activities and events, desired materials, digital assets, and campaigns.
 - » Create messaging. Develop messaging for the overall plan and specific purposes/communities as well as any topic-specific summaries. Have an “elevator pitch” that describes why Montgomery Planning initiated the project, why it matters to your audience, and how they can get involved. These should be updated throughout the plan process. Identify future messaging.
- **Check-in with your community leaders.** They are integral to creating a shared vision. Relay progress, send information in the format they’ve specified, and attend events they are hosting. Explore opportunities for collaboration and, if appropriate, co-host events or cross promote

engagement activities. Continue to look for ways to add value to the partnership and support their work.

- **Create a vision.** Visioning activities and events occur throughout this phase. This is the most free form and expansive engagement phase. Be open to all different types of visions, large and small. Make visioning a mutual learning and sharing opportunity. In addition to discovering the community vision for the future, be clear on established vision elements from Thrive Montgomery 2050, the vision zero and racial equity and social justice resolutions, etc.
- **Gather feedback.** Gathering feedback is a coordinated effort, it requires a clear understanding of roles and processes so that feedback does not get lost. Planning team members should understand what their “ask” is during each activity, however, they must be prepared to engage with and collect feedback outside of the ask. It’s important to gather feedback in a consistent way, using the same demographic questions across the department.
- **Track feedback.** The Explore Phase will test the mechanism set up for tracking data. Check in to make sure the tracking and response system is working and that everyone understands their roles. Evaluate the system and adjust accordingly.
- **Share feedback.** People like hearing what other people are thinking and talking about. Share feedback publicly, visually if possible (e.g. through word clouds, maps, graphic posters or drawings). Offer ongoing, interactive visioning activities like a graffiti wall, morris column, or online feedback map or forum.
- **Evaluate participation.** Examine who is participating in the process and who isn’t. Are you reaching your target audiences with outreach and engaging the desired community groups? Adjust tactics and tools accordingly.

Phase-specific engagement activities

- Visioning via public meetings, pop-ups, graphic recording, questionnaires, workshops, community, and stakeholder interest group meetings, roundtables, office hours, meeting in a box, etc.
- Determine priorities through ranking, prioritization and trade off exercises, feedback data analyses
- Community inventories through asset mapping, walk audits, ReactMap
- Community advertising through public displays, flyering
- Cooperative problem solving through charrettes, community meetings, online deliberative forums
- Increase audience and awareness by hosting tables at existing events, co-hosting meetings

Engagement: Consult Phase

Engagement Phase Elements

Corresponding Master Plan Stages:
Preliminary recommendations, working draft plan, and public hearing draft plan.



PRIORITIZE + REFINE

GOAL: INFORM DECISIONS

- Engage collaboratively to
- consider different options for reaching goals
 - help identify priority actions to attain the shared vision
 - brainstorm to develop recommendations, alternatives, and preferred solutions

MONTGOMERY PLANNING'S ROLE

Create recommendations based on stakeholder input, expert analysis, and planning best practices

Encourage the community to evaluate and provide feedback on recommendations, analysis, and alternatives

- Use plain language with minimal jargon and with explanations for non-planners
- Work directly with the community to ensure their concerns and aspirations are consistently understood and considered
- Explain why certain recommendations from community input are included, and others are not

COMMUNITY'S ROLE

- Review and provide feedback/testimony on recommendations and draft plans
- Engage in understanding technical issues and helping to frame issues

PROMISE TO THE COMMUNITY

- We will analyze community feedback as part of our planning process and incorporate feedback into alternatives, recommendations, and outcomes to the maximum extent possible

SAMPLE ACTIVITIES + TOOLS

- Meetings with stakeholder and interest groups using tools like online forums, prioritization and tradeoff exercises, and interactive community planning platforms
- Creation/engagement of citizen committees, advisory committees, task forces, and workgroups
- Policy dialogues via workshops and facilitated conversations
- Public comment opportunities to provide written or oral consult on drafts
- Content marketing and media relations

WHEN TO USE

- Need citizens to talk to each other about complex, value-laden issues
- Capacity for citizens to shape policies and decisions that affect them
- Want to test proposals and recommendations
- Options generated together will be respected

The Explore and Consult phases involve the most intensive engagement of the planning process. The Consult phase focuses on identifying and considering options for reaching goals and defining priorities in support of the shared vision. This phase results in preliminary plan recommendations which are presented to the Planning Board for consideration.

While engaging the community, planners must explain what they're finding through their in-house and outside expert analysis so community members can understand the opportunities and obstacles involved and then offer informed feedback and ideas. Design collaborative engagement with community members to consider options for reaching goals, identify priority actions; and brainstorm to develop

recommendations for improving future conditions, infrastructure, the build environment, amenities, and more.

Since the preliminary recommendations are the first plan product to go to the Planning Board, it is especially important that community members understand why the preliminary recommendations induce or do not include community suggestions, as well as how recommendations will help to achieve the shared vision.

Resources

Consult Phase-specific engagement checklist for success

- **Allow iterative feedback.** Share the preliminary recommendations and allow time for iterative feedback, to address or include input from stakeholders.
- **Share data and analysis.** If you've gathered data that has informed your recommendations, share it and allow community members to ask questions about it. However, releasing irrelevant data or data without proper context/explanation can muddy the water and obscure the important data. Show how the data has informed the plan. Be prepared to explain data that show that certain recommendations may have some related undesirable outcomes (e.g. reducing the number of traffic lanes to install bicycle and pedestrian infrastructure may increase travel times, explain the impact and the tradeoffs).
- **Illustrate influence.** Show community members and stakeholders how their input has influenced the recommendations. Be prepared to address or explain why certain suggestions or ideas have been left out of recommendations.
- **Enable public interactions.** Create opportunities for community members and stakeholders to provide written or oral feedback on recommendations to Montgomery Planning and to discuss recommendations with other stakeholders online and/or in person.
- **Update messaging.** Based on feedback and experience thus far, update messaging and related talking points that explains what your plan does, why it's important, and how people can continue to influence it. Develop messaging for any concepts or new topics emerging about which community members do not have prior knowledge.
- **Highlight community engagement.** Show and share the community engagement process. Some people will enter the process near the end, illustrate the work that has been done so far and how their neighbors and other community stakeholders have participated. Include photos, engagement products (i.e., marked up maps, vision boards), quotes, visual representations of comments, community partners, and activities.
- **Evaluate participation.** Solicit feedback on the process, how could engagement be improved? If people began participating late in the process, how, why, and where did they get involved?

- **Continue to educate.** Some people will enter the process during the consult phase. While some who have participated from the beginning will be prepared to take a deeper dive into the details, others will still be learning about the plan and the process. Provide resources and opportunities to level the informational playing field.

Phase-specific engagement activities

- Deliberate through online forums, feedback maps, polling, community summits
- Explain recommendations through explainers, story maps, expert panels, blogs, open houses, issue area meetings, pop-ups
- Seek expert feedback through technical working groups

Engagement: Endorse Phase

Engagement Phase Elements

Corresponding Master Plan Stages:
Public hearing draft plan, Planning Board draft plan, and County Council review and public hearing.



CONSIDER + APPROVE

GOAL: GAIN SUPPORT

- Advocate for plan recommendations through public comment and testimony
- Participate in the analysis of issues and contribute to the development of alternatives

MONTGOMERY PLANNING’S ROLE

- Seek community feedback on plan drafts
- Share how community participation shaped the plan and policies and how the master plan will implement the community’s vision
- Planning Board + County Council retain authority to make final decisions
- Communicate decisions to community members

COMMUNITY’S ROLE

- Follow + participate in the process (webcast, newsletter, email alerts, reports)
- Engage in making informed comments and forging effective compromises
- Advocate for plan recommendations to the Planning Board and County Council

PROMISE TO THE COMMUNITY

- We will look to you for feedback on plan drafts and incorporate your advice and recommendations into the decisions to the maximum extent possible

SAMPLE ACTIVITIES + TOOLS

- Tools to notify the community of public comment periods and planning decisions include eLetters, social media, postcards, ads, media outreach, text, etc.
- Public review and comment periods and testimony at public hearings that is as accessible for all community members as possible
- Joint citizen advisory committees
- Interactive community planning platforms

WHEN TO USE

- Planning Board and/or County Council have public comment periods during plan draft review
- Input may shape policy directions/plan delivery
- Developing agreement among various constituencies on recommendations to public officials

Engagement during this phase focuses on getting community members to provide public comment or testify at a Planning Board public hearing, preferably to advocate for the plan’s recommendations. Engagement may also involve community members providing input and ideas to inform the development of the various plan drafts as well as providing feedback on plan drafts.

It is vitally important that community members not only know how their input shaped the plan draft but also understand the plan draft contents and how the plan will implement the shared vision. For some, seeing notices for public hearings about the plan may be their first exposure to the planning process. Therefore, it is crucial that the plan is written in plain language and that communications such as explainers and web pages summarize plan issues and recommendations clearly.

Groups and individuals should know what to expect and how they can participate in the next steps. Be clear about what can be changed and who can make the changes. For example, once the working draft has been approved as the public hearing draft, staff cannot make any changes. Staff can collect comments to be shared with the Planning Board or can direct community members to testify, but only the Planning Board can make changes.

While Montgomery Planning is not responsible for outreach and engagement around the County Council's review of the plan, we should equip and encourage community members to advocate for the plan draft by submitting comments or testifying at a County Council hearing.

Resources

Phase-specific engagement checklist for success

- **Connect with community leaders.** Encourage community partners to testify in favor of the plan. Ask what will make it easier for their constituents to testify (ie; translated sign-up forms) and provide them with materials to share with their constituents.
- **Explain the process.** Many people may not have participated in a planning process before. Provide information that explains the process, the timeline, and how to be involved, including how to sign up for and present public testimony. Coordinate with the Planning Board Chair office to ensure that there are appropriate resources to support community members (e.g. translated signup sheets, interpreters).
- **Promote the public hearing.** In addition to eletters and conversations with community leaders, this may also involve mailings, pop-ups, or attending meetings or events.
- **Distribute educational materials.** Community members can't effectively endorse the draft if they don't understand or don't know what's in the draft. Think about creating materials for different time investments (e.g. if you have 5 minutes, watch this; if you have 10 minutes, read this, etc.) contain plain language with simple explanations. Consider providing canned blurbs staff and partner organizations can use to share the materials on social media, on listservs, through flyers, or other distribution channels.
- **Illustrate influence.** While it's important to continue to show community members and stakeholders how their input has influenced the recommendations, it's also crucial to illustrate to elected and appointed officials how the community has influenced the plan recommendations. Highlight areas of great importance to community stakeholders and areas of compromise.

Phase-specific engagement activities

- Share information via eLetter, webpage updates, social media, online or in-person office hours
- Raise awareness through press releases, media spots, mailers
- Explain the process and/or recommendations through explainers, flow charts, expert panels, feedback data visualizations
- Encourage participation through calls, meetings, emails to community leaders

Engagement: Implement Phase

Engagement Phase Elements



Corresponding Master Plan Stages:
Approval + adoption and implementation.



A note about implementation
While Montgomery Planning provides consultation and research support to the county agencies responsible for making plans come to fruition, we do not implement the plans. Once a plan is approved, Montgomery County government is responsible for coordinating plan implementation with Montgomery County agencies and partners, along with community members and developers, as appropriate.

CARRY OUT PLAN ACTIONS

GOAL: ENCOURAGE PROGRESS

- Provide feedback to county officials and developers to achieve progress toward plan goals
- Urge that implementation follow the approved plan



MONTGOMERY PLANNING'S ROLE

- Provide consultation and research support to the Montgomery County agencies responsible for implementing plans
- Evaluate development applications based on plan requirements
- Continue communication + outreach so the community can monitor progress
- Update community on policy implementation and challenges; use as an opportunity to elicit feedback and help evaluate progress toward community goals



COMMUNITY'S ROLE

- Follow plan progress and advocate for implementation to follow the approved plan



PROMISE TO THE COMMUNITY

- We will continue to evolve our community engagement strategy to meet the needs of all residents
- We will keep community members informed of plan implementation progress and bottlenecks as we are made aware

SAMPLE ACTIVITIES + TOOLS

- Community members contact County Councilmembers and other county officials to encourage implementation as planned
- Montgomery Planning may provide information, education, or clarification on plan aspects as needed and upon request

WHEN TO USE

- Once the plan is approved and at any time during plan implementation

While Montgomery Planning provides consultation and research support to the county agencies responsible for making plans come to fruition, we do not implement the plans. Once a plan is approved, the Montgomery County government is responsible for coordinating plan implementation with Montgomery County agencies and partners, along with community members and developers, as appropriate. Montgomery Planning has some role in implementation but aside from evaluating development applications based on plan requirements, our role is largely consultative.

Given our limited role in plan implementation, Montgomery Planning's community engagement decreases greatly once the plan is approved and adopted. However, continued outreach to community members with updates on plan progress are helpful for a number of reasons:

- to avoid or clear up misinformation about why certain elements of an approved plan may not be implemented as intended in the plan,
- to update interested community members on plan implementation activities, highlighting implementation "wins" (especially those that fulfill needs expressed by the community) and explaining delays or necessary changes,
- to encourage community members to lobby county officials to encourage implementation as planned,
- to continue to build community connection and trust,
- to seek feedback on plan development and implementation, and
- to deepen understanding of community needs and concerns.

Resources

Implement phase-specific engagement checklist for success

- **Provide major updates.** Once the Plan process ends, many people who participated throughout the plan may not know about developments or infrastructure improvements in the area.
- **Track developments.** Work with GIS experts in the IT department to add an approved development tracking map to your webpage.
- **Connect with community leaders.** Preserve and nurture relationships with the people who participated in the plan. Check-in with them, answer questions, and connect them with other agencies or with developers, as appropriate.
- **Consider demonstration projects.** While not appropriate for all plans, demonstration projects (such as the pop-up park in Randolph Hills, temporary bike lanes) can garner support for long term recommendations. There may be opportunities to partner with other agencies, organizations, and private companies.

Phase-specific engagement activities

- Enewsletter
- Webpage updates
- Emails or calls with community organizations and businesses

6. Evaluation

Every plan and every interaction within that plan is an opportunity to learn about how to better reach your audiences and engage your stakeholders. Evaluation also helps us improve project planning, avoid missteps throughout the process, adapt to changing realities, back up our rationale for recommendations, and report on the efforts to sufficiently engage the community in the planning process.

But future outreach and engagement can only benefit from what we learn if it is captured, evaluated, and shared with other planners and communications staff.

Effective evaluation is not only done at the end of a plan or project. Rather, evaluation must be a key component of every plan and project throughout the process ideally involving planners, communications staff, research staff, and leadership along with community members and other stakeholders.

One step toward ensuring that evaluation happens throughout the process is to build it into the Communications and Engagement Plan Process. Toward the beginning of the master planning process when we develop an outreach and engagement strategy and subsequent implementation plan, we've developed checkpoints and associated evaluation questions for use preceding each successive engagement phase. These checkpoints provide an opportunity to evaluate:

- What's working and what's not working, and why.
- What we've learned from engagement and community members thus far.
- Anything that has changed (stakeholders, community knowledge, market forces, laws/lawmakers, societal/cultural events, local/regional issues, crises, etc.) that affects the planning process.
- Montgomery Planning and county values and priorities.
- And more.

Evaluation needs to permeate the process, going beyond the specific activities and processes related to communications, outreach, and engagement. To be able to evaluate well – and to build our knowledge of audiences and communities – we need a coordinated approach to and process for capturing, analyzing, and using community information and input.

While the process and mechanisms for developing a coordinated approach to evaluation are still to be determined, the following are key steps to follow.

Define success

Set goals and determine metrics for success at the outset of a project. Doing so will help to guide engagement efforts while also guiding what information needs to be captured and how it should be captured. The first questions to ask before planning any outreach or engagement activities are:

- Why are you doing this?
- What is the desired impact?

Once you know what you're trying to accomplish, you can work backward to determine what needs to happen to get there and what you can measure to determine whether or not you're successful.

As you're defining success, think about:

- Who will need/be interested in the evaluation?
- Who needs to be involved in the evaluation? What resources are needed?
- Who conducts the evaluation? If it is multiple people, how do they coordinate?

Also think about all that is needed to be successful. For example, if you want to get a specific community to engage in a visioning process, you must first determine whether they are well-equipped to do so. This may mean that you need to spend time generating interest in the topic, provide informational and educational resources to equip community members to meaningfully participate, work with community organizations and influencers to encourage engagement, determine the best methods and settings for visioning work, etc. Once you outline these steps, look at what you can measure and what resources are needed to track and evaluate those metrics. Remember that not all metrics are quantifiable. While sometimes more difficult and time-consuming, qualitative metrics are incredibly important. Qualitative metrics can include everything from capturing community members' feedback in a focus group or meeting to assessing the quality of online conversations, the interest you get at tabling activities, or anecdotal feedback about the resources you make available.

To decide what to evaluate, ask:

- What do you need or want to know?
- What questions are most important at each stage of engagement?
- What type of information do you need in order to answer your most important questions?

In a true spirit of collaboration, planners may share their evaluation metrics with community members for their comments and suggestions. Additionally, build in occasional evaluation of community satisfaction with outreach and engagement efforts. This may take the form of a regular (e.g., annual) preferences survey but can also be done via more simple queries throughout each plan process.

Capture feedback

How you capture data can be just as important as what you choose to evaluate. There are many methods of evaluation you may use, so again let your goals and objectives drive the best evaluation methods. Once you've decided on a methodology, consider the following as you design your evaluation methods/tools:

- Use standardized questions for certain data. Capture data and feedback consistently using agreed upon demographic questions where appropriate. Doing so will ensure that certain data – such as that about outreach and engagement preferences – can be gathered across plans so we may analyze these items holistically and better understand how to effectively reach various groups of community members.
- Specify how you will collect, record, and categorize. Decide at the outset how you will capture, document, and analyze information. Thinking about how and with whom you will share learnings and evaluation findings can also inform how you collect and process information.
- Specify whether and how you will collect demographic information. Whenever possible, we should aim to gather demographic data on outreach audiences and engagement community members and other stakeholders. However, we must be sensitive to participants' comfort and safety as we gather information, never forcing anyone to respond to questions that make them uncomfortable. Likewise, we must understand that in certain engagement settings it is inappropriate and intrusive to request demographic information and we should never make assumptions about someone's background or culture based on appearance or other outward characteristics. For more information, see **Appendix B: Tips for Capturing Demographic and Sensitive Information.**

Analyze and make meaning

The data, feedback, comments, and other inputs gathered throughout a plan process do not only inform the plan, they can inform future planning efforts, outreach and engagement strategies, and overall knowledge and understanding. It is important to analyze data and feedback in a way that considers its uses beyond an individual plan and is accessible to other Montgomery Planning staff.

Analysis should consist of more than providing percentages and charts; it should include making meaning of the information. Making meaning requires attention to data but also to the context of that data: who you're engaging, the environment in which the engagement happened, and a myriad of other factors (sentiment of comments, experience with public participation processes, culture, familiarity with topics, education, outside events and issues, etc.). Context is also extremely important. For example, it would be unfair to deem outreach efforts unsuccessful for an outdoor pop-up event that was rained out. Finally, keep in mind that not all participation or data points are created equal. For example, do not give equal weight to likes on a social media post as you would comments or shares on the same post and just as you should not equally weigh a community member stopping by a booth at a community food festival and a community member participating in a public meeting about a planning topic.

Also, don't wait until the end of a process to analyze data. Data can help you adjust and course-correct efforts as you move through the outreach and engagement process. Throughout implementation of the communications and engagement plan, build in checkpoints to assess whether you're on track to meet goals and revise the implementation plan accordingly.

Use feedback

Use the data and analysis to inform future outreach and engagement and share with communications staff and planners across the department to improve future outcomes.

It's also crucial to communicate how community feedback/input is used to inform the planning process. As you communicate your rationale for plan recommendations and decisions, explain why community preferences were/were not included in plan recommendations and, when appropriate, why decisions were made despite some public opposition.

Some suggestions for providing feedback to community members include:¹¹

Providing Feedback to Constituents



Face-To-Face

Begin each meeting with updates from previous meetings.

Pass out or displaying data visualizations of past input.

Document and share where meetings have already occurred and their major takeaways.

Hold community-led house parties, with city participation.



Online

Send out regular summary emails detailing input from multiple channels.

Provide regular social media updates about previous input.

Respond to as many individual contributors online as possible.

Have local forums with trusted neighborhood liaisons.

11 Gordon, Eric. (2016). Accelerating Public Engagement: A Roadmap for Local Government is made available under a Creative Commons Non-Commercial Share Alike 4.0 License (International) https://elabhome.blob.core.windows.net/city-accelerator/Accelerating%20Public%20Engagement-A%20Roadmap%20for%20Local%20Government_By%20Eric%20Gordon_Engagement%20Lab%20At%20Emerson%20College.pdf

Partnering with Existing Groups

In some cases, staff does not have adequate social capital to be effective in engaging communities without assistance. **It is critical to forge appropriate partnerships with organizations and trusted leaders within the organizations to share information and solicit participation from their members.**

- Community leaders can provide key information at meetings of their respective groups (cultural, advocacy, or faith groups, civic or Parent Teacher Associations, among others), where the message will carry more weight when delivered by someone known to the group. Attendees can in turn share the information with their own personal networks.
- Effectiveness depends on factors such as meeting attendance, flyer distribution/translation, and ability to clearly communicate the connection between the project at hand and quality of life issues for the people in the room.
- Social service providers are an excellent channel for Information sharing.
- Face-to-face contact works best for some populations within the city, reaching people who might not have email or access to computers, and can negate language barriers.



CITY OF ALEXANDRIA | CIVIC ENGAGEMENT HANDBOOK

7. Appendices

A. Master Plan Process

Master Plan Process At-a-glance



In addition to master plan phase-specific opportunities for community involvement, community members are encouraged at any stage of the process to:

<p>sign up for email alerts about the plan</p>	<p>follow Montgomery Planning on social media</p>	<p>review the latest plan information on montgomeryplanning.org</p>
<p>encourage other community members to get involved</p>	<p>Invite planners to your community/interest group meetings</p>	<p>contact the planning team with questions or to share your input</p>

Master Planning Process





Visioning + Analysis

During this most intensive phase of the master plan work, planners continue identifying issues and begin to identify solutions. Planners facilitate community conversations to help develop a vision for the plan, discussing how to improve future community conditions, infrastructure, the built environment, amenities, and more. Simultaneously, planners review best practices and apply their expertise and that of outside specialists to explore possibilities for the community.

COMMUNITY ENGAGEMENT GOALS

- **Increase community knowledge** of area existing conditions and specific planning concepts, as appropriate (e.g., missing middle housing, Vision Zero, etc.)
- **Formulate a shared vision** for the future of the community.
- **Share ideas** and uncover innovative solutions.
- **Understand** community values.

HOW COMMUNITY MEMBERS CAN GET INVOLVED

- Develop informed and community-oriented feedback and ideas by learning more about relevant planning topics, existing conditions, and community needs.
- Participate in collaborative community conversations to generate ideas and identify recommendations to meet community needs. These conversations may occur via public meetings, charettes, community group meetings, surveys and map feedback, pop-up events, and interviews.



Preliminary Recommendations

Planners develop alternative actions and recommendations for the master plan, then present these to the Planning Board.

COMMUNITY ENGAGEMENT GOALS

- Engage collaboratively with community members to:
 - » **consider different options** for reaching goals,
 - » **identify priority actions** to attain the shared vision, and
 - » **brainstorm to develop recommendations** for improving future conditions, infrastructure, the built environment, amenities, and more.
- **Explain** to community members why preliminary recommendations include or do not include community suggestions and how recommendations will help achieve the shared vision.

HOW COMMUNITY MEMBERS CAN GET INVOLVED

- Provide input and ideas to inform preliminary recommendations.
- Review and provide feedback on preliminary recommendations drafts.



Working Draft Plan

Planners draft the working draft plan, which is first reviewed by the community, then presented to the Planning Board.

COMMUNITY ENGAGEMENT GOALS

- Engage collaboratively with community members to **prioritize and refine proposed solutions** for improving future conditions and meeting community needs.
- **Determine priority actions** to attain the shared vision and reach goals.
- **Explain** clearly how community input shaped the draft plan.

HOW COMMUNITY MEMBERS CAN GET INVOLVED

- Provide input and ideas to inform the working draft plan.
- Review and provide feedback on the working draft plan.
- Submit official public comment to the Planning Board once they receive the working draft plan.



Public Hearing Draft Plan

Planners take comments from the Planning Board and any official public comments submitted, then present a revised draft at a public hearing, during which anyone may testify. The Planning Board, which has final authority over land use matters, may also hold work sessions to review the testimony and determine whether to make any revisions before publishing the Planning Board (Final) Draft Plan.

COMMUNITY ENGAGEMENT GOALS

- **Ensure community understanding** of the plan draft contents.
- **Encourage the community to advocate** for plan recommendations through public comment and testimony.
- **Explain how community input shaped** draft plan recommendations.
- **Inform community members** of the public hearing details and process for testifying.

HOW COMMUNITY MEMBERS CAN GET INVOLVED

- Review the Public Hearing Draft, discuss with community members, and direct any questions to the planning team.
- Prepare and submit (in writing) or give (in-person or via video conference) public testimony during the Planning Board public hearing.
- Encourage other community members to testify.



Planning Board Draft

Planners incorporate community comments into the plan and present a revised draft to the Planning Board. The board approves the new draft and transmits it to the County Council and the County Executive for review.

COMMUNITY ENGAGEMENT GOALS

- **Encourage support** for the plan to the County Council.
- **Notify the community** about the Planning Board draft and when to expect the County Council's hearing.

HOW COMMUNITY MEMBERS CAN GET INVOLVED

- Not applicable.



County Executive and County Council Review and Public Hearing

Within 60 days from receiving the plan, the County Executive drafts and sends a fiscal impact analysis with any comments and recommendations regarding the plan to the County Council.

The County Council approves area master plans and functional master plans—which span more than one geographic area—and makes decisions about zoning on individual land parcels.

The County Council holds a public hearing on the plan, then committee work sessions as appropriate. The full County Council then discusses the plan/holds work sessions and approves the plan with whatever changes occurred throughout their process.

COMMUNITY ENGAGEMENT GOALS

- **Encourage the community to advocate** for the plan draft by participating in the County Council's public hearing process.

HOW COMMUNITY MEMBERS CAN GET INVOLVED

- Submit comments to the County Council per their instructions.



Approval + Adoption

Montgomery Planning certifies the plan and submits it to the Maryland-National Capital Park and Planning Commission for final approval. The plan is then added as an amendment to the General Plan and published.

COMMUNITY ENGAGEMENT GOALS

- **Announce plan approval and adoption** to the community.

HOW COMMUNITY MEMBERS CAN GET INVOLVED

- Not applicable.



Master Plan Implementation

While Montgomery Planning provides consultation and research support to the county agencies responsible for making plans come to fruition, we do not implement the plans. Once a plan is adopted, Montgomery County government is responsible for coordinating plan implementation with Montgomery County agencies and partners, along with community members and developers, as appropriate.*

COMMUNITY ENGAGEMENT GOALS

- **Equip community members with information** to encourage implementation progress.

HOW COMMUNITY MEMBERS CAN GET INVOLVED

- Encourage county officials and developers to achieve progress toward plan goals.
- Urge that implementation follow the approved plan.

* Planners track implementation progress in various ways and field questions by county agencies and others charged with implementing the plan. Montgomery Planning also:

- Provides consultation and research support to the Montgomery County agencies responsible for implementing plans.
- Evaluates development applications based on plan requirements.
- Continues communication and outreach so the community can monitor progress.

B. Tips for Capturing Demographic and Sensitive Information

Be transparent

- You must explain what data is being collected, why you are collecting the information, where and how long it will be stored, and how Montgomery Planning will use it. This helps to build trust so that people are comfortable filling out the information honestly.
- If you find a way to collect the information privately (eg, pre-registration or via the iPad suggestion below), can you guarantee confidentiality given MPIA requirements?
- How will you protect the stored data? You will need an internal policy detailing how staff should use, store, and share data and train and equip staff on the policies. More tips on storing data are in the *Protect Stored Data* section of "**NTEN Equity Guide for Nonprofit Technology.**"

Ask whether the benefits outweigh the potential harm and discomfort?

- Asking for this data may limit participation or make participants uncomfortable.
- Any questions about race and ethnicity must be optional for all attendees, which will lead to people opting out and so the data will not be accurate/representative of those in attendance.
- People may not feel comfortable sharing this information on a sign-in form that gets passed around. The best you might do is have iPads with a "form" for each individual participant that gets passed around and cleared of personal information before being passed to the next attendees. You would need to have several iPads going and staff to ensure people know how to use them and to track them and ensure they're returned.
- You must consider that some people may feel that it's harmful for them to disclose this information in a public forum, and these people may be more likely to be from the groups you generally don't reach.

Provide options and/or write-in

- People may identify as multiple races, so you must allow for that.
- There is debate on whether to provide the "standard" Census/OMB options for race and ethnicity versus allowing people to write in their race and ethnicity. The latter obviously presents problems for data coding and reporting but doesn't restrict people into pre-defined categories.
- Some professionals recommend using the "standard" options plus an "other/write-in" option.
- Whatever you do, do not try to "guess" based on how people look, their names, or other perceived characteristics. This is extremely problematic for a number of reasons and if the public or anyone got wind that Montgomery Planning was doing this, it would be a PR disaster at the least and completely erode trust with the community.

Consider the circumstance

The most appropriate approach to capturing race and ethnicity data is dependent on the specific circumstances of the event, so multiple methods will be needed. Two are suggested below.

- Pre-event registration form. However, we know this may be problematic for a number of reasons:
 - » Not everyone has access to/is comfortable with online forms.
 - » Not all events require/lend themselves to pre-registration.
 - » People register but then do not show up so you still wouldn't have an accurate measure of the race and ethnicity of respondents. You could ask people to pre-register and then ask them to check-in at the event by providing their last name or email so you can track who actually showed up.
- Optional post-event survey. You would need to capture attendee emails and the response rate would be much lower on anything that is post-event. However, such a post-event survey could provide an opportunity to get feedback on the event. But should be kept short.

Neither of these options addresses events like pop-ups, street fairs, intercept interviews, etc. And all of the options require people to opt-in, so you will not get an accurate count/assessment of the races or ethnicities represented.

C. References and Additional Resources

The following websites and materials were referenced while compiling this guide. Anything directly quoted or referenced is specified as a footnote in the appropriate place in this guide. A few additional resources which may be helpful to staff are also included in the list below.

For further information, including lists of engagement activities, facilitation best practices, equitable engagement resources, and more are available in the Engagement Resource Library.

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