

**Assessing Meaningful
Community Engagement
in Health & Health Care
Programs & Policies**



**External
Tools to
Support
Engagement**



NATIONAL ACADEMY OF MEDICINE

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The [Assessing Meaningful Community Engagement in Health and Health Care Policies and Programs project](#), developed by the [National Academy of Medicine Leadership Consortium: Collaboration for a Learning Health System](#), identifies concepts and metrics that can best assess the extent, process, and impact of community engagement. This effort developed a Conceptual Model, produced Impact Stories, and identified Assessment Instruments to measure community engagement.

As essential as measuring engagement is, equally critical are the processes used to engage communities (e.g., approaches, methods, and strategies), the stories told that demonstrate impact, and the evaluation plans developed with communities. In this document, you will find lists of related external tools compiled to support audiences in identifying processes for engaging communities, telling the story of community engagement and its outcomes, and developing engagement assessment plans. Please note that these lists are not comprehensive, and the tools listed here are not endorsed by the Assessing Community Engagement Organizing Committee or the National Academy of Medicine.

In addition to the Assessing Community Engagement resources and the external tools, a Guide for Using the Resources was developed to explain how each of the three project resources may be used to support measuring community engagement. The Guide also offers considerations for building a plan for assessing community engagement. Click [here](#) to view the Guide.

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External Tools to Support the Process of Engaging Communities

Each community is different and wants to be engaged in various, multiple, and evolving ways. Processes for engaging communities should be consistent and continuous, occurring prior to, during, and after assessing the impact and influence of that engagement.

Below is a list of tools which can be used to help audiences learn more about different processes that can be used to engage communities. Those interested in the process of engagement are encouraged to review these tools, identify others, and modify the tools, as needed, to ensure alignment with their communities' unique context, desired goals, and objectives.

TOOL NAME	DESCRIPTION
AAMC Center For Health Justice Community Engagement Toolkits	These toolkits help institutions engage their academic and local communities in dialogue to identify actions individuals or institutions can take to move communities toward health and health care equity.
AARP Roadmap to Livability Collection: Community Listening Session Tool Kit	This tool kit was developed to gather public feedback in small group settings and is the second book in the AARP Roadmap to Livability Collection.
AHA Community Health Assessment Toolkit	The Association for Community Health Improvement's Community Health Assessment Toolkit offers a nine-step pathway for conducting a Community Health Assessment (CHA) and developing implementation strategies.
A roadmap for effective community engagement in healthcare: Final report from INSPIRE Phase I	INSPIRE (Initiating National Strategies for Partnership, Inclusion, and Real Engagement) is a collaborative and coordinated team of organizations and people with lived experience committed to advancing the practice of authentic community engagement in the U.S. healthcare system. This report presents actionable recommendations for both healthcare organizations and community members to implement more and better community engagement
Aspen Institute Measuring Community Capacity Building	This is a workbook for community leaders and citizens who want to: <ul style="list-style-type: none"> • Improve the ability of individuals, organizations, businesses and government in their community to come together, learn, make well-reasoned decisions about the community's present and future, and work together to carry out those decisions—that is, to build their community's capacity. • Find ways to set goals as they do this work, make sure they are actually moving toward these goals, and celebrate their progress.

<u>Assessing Public Participation Techniques for Comfort, Convenience, Satisfaction, and Deliberation</u>	<p>Public participatory techniques have been the focus of a large and growing body of environmental literature. There is some consensus among those who study these techniques that there is a need to develop and implement new techniques that meet certain criteria. These include that the techniques be comfortable, convenient, and satisfying to participants. Authors have also frequently called for the use of deliberative techniques, which allow participants to express and listen to a variety of perspectives regarding the issue at hand. However, the literature on public participation lacks a set of widely applicable evaluation methods to determine whether participants in techniques find them comfortable, convenient, satisfying, or deliberative. This paper reports on the implementation of two different techniques that participants scored fairly high on all of these factors, as well as the scale-based survey questions developed to measure these factors.</p>
<u>ASTC Beyond Inclusion: Equity in Public Engagement: A Guide for Practitioners</u>	<p>The guidebook describes eight principles for developing "meaningful and equitable inclusion of diverse voices" for designing and carrying out public engagement. It highlights that equitable inclusion is vital to ethical and effective engagement, and that collaboration across diverse groups of people and perspectives can improve innovation, decisions, public support for decisions, and democratic capacity. It focuses particularly on public engagement to inform decision-making processes, but the principles are applicable to developing community science projects as well.</p>
<u>ATSDR Public Health Assessment Guidance Manual Community Engagement Actions, Tools, and Activities</u>	<p>This section will familiarize you with frequently used community engagement tools and activities. There are many actions, tools, and activities available to facilitate community engagement during the Public Health Assessment (PHA) process. Not all of these actions, tools, or activities will be used at every site. Choose those that are appropriate for the phase of the process, the level of community interest, and the degree of hazard a site poses.</p>
<u>CADCA People Power: Mobilizing Communities for Policy Change</u>	<p>This publication provides an overview of the steps associated with engaging in community mobilizing to implement environmental strategies with a particular emphasis on adopting alcohol, tobacco, and drug (ATD) policies at the community level.</p>
<u>Enhancing Equity in Cross-Sector Alignment Through Meaningful Community Engagement: Community Open Mic Sessions Report</u>	<p>Promoting authentic community engagement has proven challenging in the field of public health. To address this significant challenge, the Center for Community Health Alignment in the Arnold School of Public Health was awarded an Aligning Systems for Health grant from the Robert Wood Johnson Foundation (RWJF). The goal of the project is to understand how to promote meaningful and intentional community engagement and equitable decision making towards more sustainable community health improvement.</p>
<u>CDC Division of Nutrition, Physical Activity, and Obesity Practitioner's Guide for Advancing Health Equity: Community Strategies for Preventing Chronic Disease</u>	<p>This guide provides lessons learned from evidence- and practice-based strategies. The innovative ideas highlight how to maximize the effects of policy, systems, and environmental improvement strategies—all with the goal of reducing health disparities and advancing health equity.</p>

CDC Healthy Schools Family and Community Engagement	These documents were developed to support family and community engagement in physical activity.
CMS Person and Family Engagement Toolkit (April 2022 version)	The Centers for Medicare & Medicaid Services (CMS) developed the PFE Toolkit to serve as a roadmap for successful engagement with PFE Partners. It is an easy-to-follow, comprehensive guide intended to support the implementation of best and standard practices for PFE across all CMS contractors. The PFE Toolkit will provide essential information and resources for measure developers to improve, or establish, PFE processes across their organizations.
Community Planning Toolkit: Community Engagement	This section of the toolkit provides guidance on the issues to consider when planning and designing community engagement. It focuses on quality and effectiveness, process planning and designing engagement tailored to the particular issue, level of participation to be achieved, timeframe and range of stakeholders affected.
Community Engagement Toolkit	This toolkit is designed to assist groups and individuals throughout North Dakota in engaging their community to make a difference through a collaborative process. We designed this toolkit to be used to address a broad spectrum of health and community level concerns.
Community Engagement Toolkit for Rural Hospitals	We have combed through numerous resources and adapted them to create an easy to use toolkit aimed at helping administrators leverage their hospital's strengths and resources to engage in a community dialogue about health and form sustainable community partnerships.
Community Tool Box	Millions of people use the Community Tool Box each year to get help taking action, teaching, and training others in organizing for community development. This page lists 46 Chapters through which you can obtain practical, step-by-step guidance in community-building skills, and shares related Toolkits that offer short outlines for key tasks.
Consortium for Cancer Implementation Science Resources for Stakeholder & Community Engagement	Dissemination and implementation researchers and practitioners should purposefully integrate community engagement into their work as a way to speed translation of knowledge to practice to improve health equity. This tool, prepared by the Consortium for Cancer Implementation Science (CCIS) Community Participation Capacity Building Task Group, includes readings, trainings, guidance, tools, and resources to facilitate researchers and community stakeholders in their efforts to practice meaningful community-engaged implementation science.
Engaging with impact: Targets and indicators for successful community engagement by Ontario's Local Health Integration Networks	Engaging with Impact addresses the challenge of evaluating engagement and proposes a series of indicators that can be used to assess performance and develop a culture of engagement across Ontario's public health system.
Engaging Your Community: A Toolkit for Partnership, Collaboration, and Action	Engaging with impact: Targets and indicators for successful community engagement by Ontario's Local Health Integration Networks (LHINs) focuses on the value of community engagement. Specifically, it deals with the challenge of evaluating engagement and proposes a series of recommendations and indicators that can be used to assess performance and develop a culture of engagement that will help to rewrite the relationship between health administrators and their public.

<u>Evaluating Participation: A guide and toolkit for health and social care practitioners</u>	This guide was developed as a tool for evaluating public involvement and participation in health services. It is designed for assessing the way the way in which a participation project has been undertaken and the results of that have come about from that activity.
<u>Evaluating the participatory process in a community-based heart health project</u>	This paper presents the evaluation of a participatory research process used in a community-based heart health project, the British Columbia Heart Health Demonstration Project.
<u>Equitable Long-Term Recovery and Resilience</u>	The Federal Plan for Equitable Long-Term Recovery and Resilience (Federal Plan for ELTRR) lays out an approach for federal agencies to cooperatively strengthen the vital conditions necessary for improving individual and community resilience and well-being nationwide.
<u>Gainesville Community Engagement Guidebook</u>	The City of Gainesville, Florida has enlisted Public Participation Partner's (P3) help in developing resources for standardizing the City's community engagement and training staff. As part of these efforts, P3 interviewed City staff members and community partners to gather information on current community engagement practices. With a better understanding of existing processes, P3 developed a comprehensive, 80-page guidebook outlining a standard and equitable process for planning for and implementing community engagement in Gainesville.
<u>Head Start Parent, Family, and Community Engagement Framework</u>	The Head Start Parent, Family, and Community Engagement Framework is an organizational guide for collaboration among families and Head Start and Early Head Start programs, staff, and community service providers to promote positive, enduring outcomes for children and families.
<u>Health PEI Engagement Toolkit</u>	The Health Prince Edward Island (PEI) Engagement Toolkit will: (a) help you learn about the various components and key steps of the engagement processes; (b) provide you with several sample tools at each stage in the engagement process that you can use with your committee, group, or event; and (c) encourage you to evaluate your process and continue to learn and improve current engagement efforts throughout Health PEI.
<u>Institute for Patient- and Family-Centered Care Tools/Checklists</u>	Institute for Patient- and Family-Centered Care (IPFCC) advances the understanding and practice of patient- and family-centered care. In partnership with patients, families, and health care professionals, IPFCC seeks to integrate these concepts into all aspects of health care. IPFCC offers a wide variety of free downloadable PDFs to use in your organization.
<u>KU CSL Community Engagement Toolbox</u>	The University of Kansas (KU) students, faculty, researchers, staff, and alumni are engaged with communities locally and globally. Meaningful engagement with partners in communities is part of our service-learning, community-engaged research and scholarship, and lifelong commitment to public service. This toolbox serves as a guide to support our collaborative work using our Strategic Action Framework for Community Engagement. Our framework for community engagement includes the following phases: Assessing the Situation, Planning what will be done, Taking Action, Evaluating what has occurred, Sustaining the Effort, and Communicating and Celebrating successes. Each phase incorporates Engagement and Reflection.

Nexus Community Engagement Institute Community Engagement Assessment Tool	<p>We offer the tool as a guide to help ourselves and our fellow practitioners grow in our understanding of community engagement and to be thoughtful about our own practice of engagement techniques.</p>
NYC Department of Health and Mental Hygiene Community Engagement Framework	<p>The New York City Department of Health and Mental Hygiene, New York, launched a multi-faceted internal reform effort called Race to Justice, which aims to build our organizational capacity to advance health equity, and includes a community engagement framework for the agency.</p>
Pathways Community HUB Institute Connecting Those at Risk to Care: The Quick Start Guide to Developing Community Care Coordination Pathways	<p>This quick start guide is a reference and resource for public and private stakeholders engaged in improving the community care coordination system for identifying high-risk individuals; documenting their specific health, social, and behavioral health risk factors; and addressing those risks in a pay-for-performance approach.</p>
Patient stakeholder engagement in research: A narrative review to describe foundational principles and best practice activities	<p>The aims of this narrative review are to identify, quantify and summarize (a) the conceptual foundational principles of patient stakeholder engagement in research and (b) best practice activities to support these efforts.</p>
PCORI Guide for Engaging with Research Partners about Data and Analysis: Activities to Support Research Partner Involvement in Data Analysis and Interpretation	<p>PCORI has developed this Guide for Engaging with Research Partners about Data and Analysis to prepare research staff to involve research partners in analyzing and interpreting quantitative data. This Guide presents concepts, terms, and examples that are specific to clinical effectiveness research (CER) and patient-centered outcomes research (PCOR) methodologies. This guide provides a series of tips, resources, and activities to help research staff foster communication with partners and build their capacity to actively participate in data analysis and interpretation.</p>
Policy Link Community Engagement & Participation Checklist: Addressing Disparities for Healthier Places	<p>The items included in this outline are important components of an authentic and participatory community engagement process. This outline should be used to help assess the extent to which you are integrating community input and involvement into your project.</p>
Public Health Institute (PHI) Report & Toolkit: Strategies for Strengthening Community Engagement	<p>PHI's Center for Wellness and Nutrition (CWN) provides tailored TA and support to public health organizations and communities to help launch, scale and evaluate community engagement strategies—helping to build trust and sustainable change, and leading to greater impact and advancement of equity goals. The following CWN resources provide insights, tools, guidance, local examples and more to help strengthen your community engagement efforts.</p>
Racial Equity Tools: Strategies	<p>Racial justice organizations use a variety of strategies to end structural racism and advance social change. Given how entrenched structural racism is in the U.S., the decision on what strategy to deploy is often a matter of audience, goal, and outcome. This section includes information on 18 different strategies, for example using the arts, advocacy, community organizing, and policy change, plus relevant frameworks, evaluation tools and reports, and, where appropriate, a link to key organizations and sites for more information. For further insights and ideas about channeling strategies into a plan of action, please refer to the section on Informing the Plan.</p>

<u>ReseArch with Patient and Public involvement: a RealisT evaluation – the RAPPORT study</u>	<p>The objective of this paper was to determine the types of patient and public involvement (PPI) in funded research, describe key processes, analyse the contextual and temporal dynamics of PPI and explore the experience of PPI in research for all those involved. Mechanisms contributing to the routine incorporation of PPI in the research process were assessed, the impact of PPI on research processes and outcomes evaluated, and barriers and enablers to effective PPI identified.</p>
<u>Safe Routes Partnership Let's Get Together: A Guide for Engaging Communities and Creating Change</u>	<p>The Safe Routes Partnership is a national nonprofit organization working to advance safe walking and rolling to and from schools and in everyday life, improving the health and well-being of people of all races, income levels, and abilities, and building healthy, thriving communities for everyone. This resource is for individuals, organizations, and government agencies working on equity and engagement in Safe Routes to School and beyond.</p>
<u>TNTP Community Engagement Self-Assessment and Reflection Tool</u>	<p>The New Teacher Project (TNTP) works at every level of the public school system to help partners achieve their goals for students, sharing more than 200 publications and resources to offer educators, policymakers, and families big ideas and practical strategies to improve school experiences.</p>
<u>Tulane University and LPHI GRID Toolkit</u>	<p>Tulane University and Louisiana Public Health Institute (LPHI) partnered with stakeholders to address engagement in research on COVID-19 among communities who have been historically underrepresented as researchers and participants. The project introduced tools and mindsets designed to address disparities in health research by engaging in equity-centered work. Through a process of co-design, the team produced a toolkit to guide investigators and stakeholders in identifying research topics that are important to people on health issues that significantly impact their lives.</p>
<u>UNICEF Minimum Quality Standards and Indicators for Community Engagement</u>	<p>The purpose of the Minimum Quality Standards and Indicators for Community Engagement is to establish a common language among all stakeholders for defining community engagement principles, key actions, goals and benchmarks. They provide guidance for gender-sensitive community engagement approaches in high-, middle- and low-income countries, and in development and humanitarian contexts, across all sectors.</p>
<u>University of Colorado DICEmethods</u>	<p>Dissemination, Implementation, Communication, and Engagement (DICE) methods is a guide for health researchers for identifying engagement strategies.</p>
<u>Urban Institute: Community Engagement during the COVID-19 Pandemic and Beyond</u>	<p>This guide is meant to assist community-based organizations that are interested in facilitating remote community engagement activities. Although this guide was developed as a response to the COVID-19 pandemic, it can also be used by organizations looking to broaden their outreach strategy generally.</p>

U.S. Department of Housing and Urban Development Citizen Participation & Equitable Engagement (CPEE) Toolkit	<p>The CPEE Toolkit provides grantees with recommendations for conducting inclusive and equitable engagement that will inform and help create programs for the whole community, with a special emphasis and a targeted approach on historically vulnerable and underserved areas.</p>
U.S. Department of Transportation Promising Practices for Meaningful Public Involvement in Transportation Decision-Making	<p>The purpose of this document is to provide promising practices which can promote a shared understanding of meaningful public involvement. We aim to promote promising practices for transportation professionals to incorporate meaningful public involvement into each stage of the transportation decision-making process and project lifecycle, including operations and service provision. This guide is intended to support practitioners in all modes of transportation in various roles, including those working in policy, planning, engineering, operations, civil rights, environmental justice, and public involvement.</p>
Vanderbilt Institute for Clinical and Translational Research Community Engagement Studio Toolkit	<p>The Community Engagement Studio is a consultative session for researchers interested in getting input on their work from patients, caregivers, health care providers, community members and other non-researcher stakeholders.</p>
WHO Community engagement: a health promotion guide for universal health coverage in the hands of the people	<p>This guide is intended for change agents involved in community work at the level of communities and healthy settings.</p>
Youth Listening Session Toolkit	<p>The toolkit is designed for organizations that want to conduct a youth listening session within their own community.</p>

External Tools for Telling the Story of Community Engagement & Its Outcomes

As a part of the Assessing Community Engagement effort, [Impact Stories](#) were developed as part of this effort to demonstrate how others have engaged their communities and the outcomes observed.

Below is a list that includes additional existing stories of community engagement and tools to support audiences in telling their stories. There are many more stories of community engagement that exist and could be told to amplify important messages and share real-world insights, inspiration, and impacts.

TOOL NAME	DESCRIPTION
Canva	Canva has a suite of graphic design tools to help people create and share stories with effective visuals.
Community Commons	Community Commons is an online platform that supports change-makers working to advance equitable community health and well-being. Among its curated tools are inspiring stories from diverse groups and methods for sharing and connecting.
Families USA Story Bank	Families USA is a nonprofit, nonpartisan consumer health advocacy and policy organization. Their website features a Story Bank that elevates people's voices and shares their stories about issues or successes with health care.
Piktochart	The Piktochart platform can enhance the visual storytelling experience by helping you create videos, images, infographics, and more.
Rev	Rev allows you to create stories by transcribing speech to text, providing closed captioning and subtitle options. You may also use Rev's Audio and Voice Recorder phone app to record ideas, memos, and conversations from your phone and upload them straight to Rev for transcription.
SAMHSA Share Your Story Guide	This guide was originally designed to help individuals living with mental and substance use disorders share personal stories of recovery using a digital format. Using the information in this how-to guide, you can plan, organize, and make your own digital story.
StoryCenter	StoryCenter supports individuals and organizations in using storytelling and participatory media for reflection, education, and social change. They host workshops to provide individuals and organizations with skills and tools that support self-expression, creative practice, and community building. Workshops focus on topics including digital storytelling, podcast storytelling, story facilitation, and more.
StoryCorps	The StoryCorps interview model establishes a sacred space for two people who know each other to speak for 40 uninterrupted minutes about what matters to them most. Because every StoryCorps interview is recorded, it can be preserved and shared for years to come.
TapeACall	TapeACall technology offers a built-in way for people to record conversations over the phone, allowing people to capture personal messages and oral stories.

VoiceThread	VoiceThread is a presentation and storytelling tool for the web, iOS, Android, and Chrome. It provides users a platform to create and share media projects incorporating video, image, voice, text, and drawing.
PHRASES	Public Health Reaching Across Sectors (PHRASES) supports an “all-hands-on-deck” approach, with tools to build communication skills in sharing public health’s unique value proposition and strategies designed for success.

External Tools to Support Development of Community Engagement Assessment Plans

There are many ways to use the Assessing Community Engagement project resources—the Conceptual Model, Impact Stories, and Assessment Instruments—as a part of your engagement assessment plan. The Guide to Using the Resources provides examples, but additional tools exist to support developing a plan. Below is a list of tools that provide insights and guidance for developing evaluation and assessment plans. Those interested in developing their own assessment plans are encouraged to review these tools, identify others, and modify the tools, as needed, to ensure alignment with their communities’ unique context, desired goals, and objectives.

TOOL NAME	DESCRIPTION
AHA Community Health Assessment Toolkit	The Association for Community Health Improvement’s Community Health Assessment Toolkit offers a nine-step pathway for conducting a Community Health Assessment (CHA) and developing implementation strategies.
Community Engagement Toolkit	This toolkit is designed to assist groups and individuals throughout North Dakota in engaging their community to make a difference through a collaborative process. This toolkit can be used to address a broad spectrum of health and community level concerns.
Engage for Equity Tools & Resources	<p>“Engage for Equity (E2): Advancing Community Engaged Partnerships” seeks to extend the science of Community-Based Participatory Research (CBPR) and Community-Engaged Research (CEnR) by developing measures and tools to strengthen partnering and engagement processes. The tools and resources presented here provide a step-by-step approach for research partnerships to examine where they are now and where they want to be in the future. The approach contains the following steps:</p> <ul style="list-style-type: none"> • Identify shared core values and principles. • Document critical moments of your partnership’s history with the River of Life tool. • Identify your outcomes and the partnering practices you are using to get there with the CBPR Model. • Administer a Community Engaged Survey that follows the domains of the CBPR model. • Interview and/or conduct a focus group to provide additional understandings of what works well and the challenges in your partnership with the available guides. • Review your partnership’s data from the Community Engaged Survey and reflect on your current practices. • Use the Promising Practices Guide to compare aspects of your partnership to partnerships across the nation.
KU CSL Community Engagement Toolbox	The University of Kansas (KU) students, faculty, researchers, staff, and alumni are engaged with communities locally and globally. Meaningful engagement with partners in communities is part of our service-learning, community-engaged research and scholarship, and lifelong commitment to public service. This toolbox serves as a guide to support our collaborative work using our Strategic Action Framework for Community Engagement. Our framework for community engagement includes the following phases: Assessing the Situation, Planning what

	will be done, Taking Action, Evaluating what has occurred, Sustaining the Effort, and Communicating and Celebrating successes. Each phase incorporates Engagement and Reflection.
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