

# ENGAGEMENT PLANNING CHECKLIST



Use this Engagement Planning Checklist to walk you through planning an engagement event to help reduce oversights and missed opportunities. This checklist is designed to be used alongside our Engagement Roadmap and a completed Engagement Roadmap Worksheet.

## Marketing & Promotion

- Tailor your message to your audience, not just in your engagement effort, but also the communications supporting it.
- Utilise existing networks of communication to get information out. For instance, a community leader or group may have a WhatsApp group which they can use to share about your engagement effort.
- Post in relevant Facebook groups, and any other social media platforms.
- Follow-up after the event to reiterate thanks and summarise findings, if possible.

## Presentations & Materials

- Presentations & materials should clearly communicate your message and be tailored to the audience receiving them.
- Regardless of the type of engagement (focus group/workshop or public event), provide something interactive for attendees to do.
  - Any interactive elements should have an analogue version at a minimum with a digital version to compliment it.
- Consider group activities where attendees are sectioned off into small groups for more focused engagement.

## In-Person

- Select a venue that is centrally located and/or easy to get to. Provide travel information on all modes, not just driving and parking.
  - Is the venue fully accessible (lift, if needed; accessible bathrooms; ramps)?
  - Is it walkable, wheelable, or cyclable?
  - Is there suitable cycle parking?
  - Are there public transport services nearby?
- Bring materials that have your logo and links to your work online that attendees can bring home with them.
- Provide refreshments (food and drink).
- Build 15-30 mins into your agenda for arrivals and socialisation.
- Provide prints outs of the slides you'll be presenting, especially if the projection of the presentation isn't visible from all seats.

## Online/Virtual

- Ensure that potential attendees have access to the meeting link in advance, typically a week in advance.
  - Platforms like Eventbrite can be set up so that registered attendees are sent a reminder an hour or two before the meeting begins.
- Provide as much information as you can in advance, such as agenda for the meeting, slides, and purpose/aim of the engagement.
- Provide instruction on how to use online platforms (ie. mute/unmute buttons and chat features) at the start of each meeting, as some attendees may be unfamiliar.
- If utilising online interactive methods (ie. Menti, Miro, Slideo), be sure to share the link to these platforms within the chat box.
  - Plan how you will capture responses from those who are unable to use these platforms.

For more information and resources to help support you, as well as case studies from our engagement research, visit: <https://www.AboutCommunityEngagement.com/resources>

Also, you can follow our journey and receive regular updates on our work by following our LinkedIn page: <https://www.linkedin.com/company/about-community-engagement-ace/>