# A Toolkit to Guide Equity-Centred Community Engagement in Research

IC/ES Data Discovery Better Health

Edwin S.H. Leong Centre for Healthy Children
UNIVERSITY OF TORONTO

SickKids

# Publication Information



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## Who We Are

Committed to working with scientists, partners and communities to help explore today's problems and inform solutions for better health and healthcare tomorrow.

ICES is an independent not-for-profit research and analytics institute and registered charity with seven sites across Ontario. Formed in 1992, ICES is governed by a Board of Directors and guided by a Scientific Advisory Committee and a Public Advisory Council, representing diverse regions and communities across Ontario. ICES is powered by a community of research, data and clinical experts. Many are practicing clinicians who understand the everyday challenges of healthcare delivery. Together, we produce insightful research and analytics that informs thoughtful policy.

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## Author Affiliations

This toolkit was developed in partnership with the Edwin S.H. Leong Centre for Healthy Children and ICES. Community Engagement Specialists from both organizations co-developed this resource in response to requests from researchers and trainees seeking guidance on how to engage communities in meaningful ways, especially when working with administrative data, equity-related research questions and health system initiatives. The toolkit includes case examples, reflection questions and planning templates to build authentic and respectful relationships with communities. It also supports examining issues of power and positionality, sharing decision-making where appropriate and integrating community expertise into research design, interpretation and knowledge mobilization. We developed this resource with the understanding that community engagement is a skill, not a task, and that researchers may be at different stages of readiness. Whether you are beginning to explore community engagement or are refining an existing approach, we hope this resource meets you where you are and supports you in applying these practices thoughtfully.

We welcome feedback and dialogue as this toolkit is a living document, and we will continue to revise and expand it based on what we learn from community members and researchers. If you have suggestions or reflections, please contact us at public@ices.on.ca

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# Contents

# What is Community Engagement? Why does it matter?

Research that seeks to improve community health does not begin in clinics, datasets or institutional strategies: it begins with people and communities.

Equity-centred community engagement recognizes that lived and living experience is essential expertise for any issue being studied. Instead of positioning community members as participants or passive recipients of research, this approach acknowledges their expertise and includes them as partners and co-creators in the work, such that those most affected by inequities influence decisions that shape research priorities, methods and outcomes [1–3].

Community engagement is most meaningful when it is not limited to the final stages of a project or used solely to validate decisions that have already been made. When engagement occurs only at this stage, it risks being tokenistic, where opportunities for participation are limited and community input has little influence on the project's direction. This can leave community members feeling that their perspectives were not fully considered or that their contributions had limited impact. Instead, meaningful community engagement begins early in the project and is embedded throughout, building intentional relationships where academics and community members work alongside each other as partners throughout the entire research process [1,4]. It shifts the process from "something done to communities" to "something created with communities" with reciprocity [5–7].

Ultimately, collaborating with community members also benefits researchers in the following ways:

- Research is most impactful when shaped in partnership. Community members prompt thoughtful consideration of how to operationalize ethical conduct, support data interpretations that are more accurate and attuned to reality (contextualization), enhance actionability of findings (real-world knowledge) and make communications more accessible and relevant beyond academia [4, 8–10].
- Meaningfully integrating community members is also important to sustaining public trust in science and research, especially when working with collective and sensitive data [11,12]. It builds accountability and demonstrates willingness to share decision-making power, signalling that research and policy decisions are being shaped not only by academic expertise but also by the people who are most affected.
- Certain funders, research institutions and publishers increasingly recognize the value of community engagement. Some granting agencies ask applicants to include engagement strategies, and thoughtful approaches strengthen proposals.

Community engagement involves reflecting on positionality and power, listening with humility and working towards tangible community benefit [3,5,6]. It involves authentic, sustained, trust-based relationships. Without this foundation, well-intentioned research can unintentionally reinforce power imbalances, overlook context, be extractive or tokenistic and cause harm [7,13].

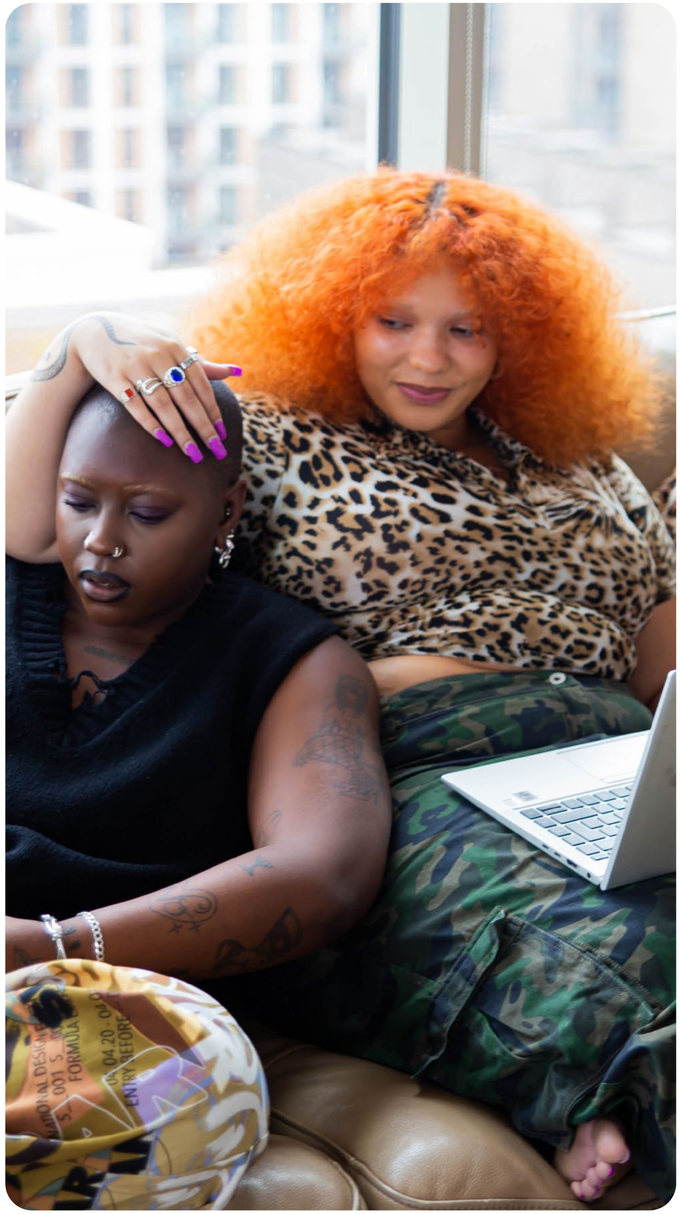
Community engagement is also complex. There is no single "correct" approach. Context matters. Relationships matter. Community priorities matter. We have assembled the following toolkit to support your learning, reflection and practice. It provides steps, tools, prompts and examples to help you integrate meaningful engagement into your research in ways that are respectful, transparent and equity-centred.

### *What makes ‘community engagement’ distinct?*

Community engagement involves building ongoing partnerships with groups of people who are connected by shared identity, lived or living experience, geographic location, culture or common interest to address issues that affect their wellbeing [1,2,7,9,13,14]. It emphasizes relationship-building, mutual learning and shared decision-making, often through collaborative approaches such as co-creation. In contrast, public engagement typically aims to reach a broader audience and may be more episodic in nature, such as through town halls, surveys or consultations. While public engagement focuses on gathering input or sharing information, community engagement seeks deeper partnership and shared influence over decisions and processes.

Where patient and family engagement focuses on people receiving health care, community engagement looks beyond the health care system to the broader social and structural conditions that shape health, such as housing, income, transportation, food security, racism, education and access to childcare and early supports. Patient and family partners are also members of various communities, and their experiences of illness may be shaped by social, structural or systemic inequities; however, the patient and family engagement approach focuses primarily on how health care systems can be improved to ensure people receive better care. In contrast, a community engagement model is interested in how we can change the conditions that influence health beyond the health care system, before people ever become patients. The community engagement lens is particularly important when data are described, analyzed or reported by race, ethnicity, gender, income, geography or other sociodemographic identifiers [15–17].

Within this toolkit, we focus on community engagement to better meet the needs identified by researchers across our institutions who are increasingly working with sociodemographic identifiers. Many researchers have shared that, while they understand the importance of involving patients or the public in research, they are less certain about how to meaningfully engage community members affected by social and structural inequities or whose experiences extend beyond what is captured in data. Community engagement requires different skills, preparation and ways of sharing power than traditional patient or public involvement, and this toolkit strives to respond directly to those needs. It offers practical guidance and reflection prompts to support researchers in building authentic, reciprocal partnerships with community members from the beginning of a project.



### *What about partnership with First Nations, Inuit and Métis communities?*

Engagement with Indigenous communities differs from engagement with other communities because First Nations, Inuit and Métis communities are recognized as rights holders with inherent treaty and/or constitutionally protected rights. As such, organizations have a duty to consult and uphold nationhood, sovereignty and a distinctions-based approach when partnering with First Nations, Inuit and Métis communities. While some of the general concepts in this toolkit may provide a starting point for partnership- and relationship-building, this toolkit does not specifically address the historical and contemporary impacts of colonialism; the distinct rights of Indigenous communities; the importance of Indigenous data sovereignty and governance; nor the distinct histories, cultures and practices of Indigenous communities across Turtle Island.

Please refer to fundamental resources that have been developed by or with Indigenous communities:

- The First Nations Principles of Ownership, Control, Access & Possession (OCAP)
- National Inuit Strategy on Research and Implementation Plan
- Principles of Ethical Métis Research
- Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans – Chapter 9: Research Involving the First Nations, Inuit, and Métis Peoples of Canada

Additionally, when beginning partnership with First Nations, Inuit or Métis communities or organizations, consider asking your community contact(s) if the community or organization has any existing research ethics policies in place to guide your community engagement work. Always follow the community and/or organization's lead on best practices for culturally appropriate engagement methods and research. When planning for engagement with First Nations, Inuit or Métis partners, consider also the importance of cultural awareness and safety training for all research team members:

- The Fundamentals of OCAP Training
- Cultural Safety Training – Indigenous Primary Health Care Council
- San'yas Indigenous Cultural Safety Online Training

These trainings may also help prompt you to ask yourself the right questions when shaping a partnership:

- Indigenous Community Research Partnerships Training
- Learn to Use the Indigenous Research Level of Engagement Tool

These resources were selected to support researchers in beginning their learning journey and are not intended to be an exhaustive list. We recognize that there are many other valuable resources, and that each Indigenous Nation, community and organization holds its own protocols and knowledge systems. This list is a starting point, not an endpoint.

### *How to use this toolkit*

This toolkit is organized around six phases of engagement: Prepare, Plan, Connect, Engage, Sustain and Evaluate. Each section includes brief explanations paired with practical tools to help you move from ideas to action.

Throughout the toolkit, you will find four types of supplemental information:

1. Reflection points that draw attention to key information,
2. Deeper dives that recommend further reading,
3. Case examples that demonstrate real-world application of information, and
4. 'Take action' prompts to invite reflection and application in the context of your own work.

**Reflection points**

Draw attention to key contextual factors.

**Deeper dives**

Link external references for further reading or adaptation.

**Case examples**

Present real-world examples of principles in action.

**Take action!**

Checklists to prompt you to apply each section's lessons in the context of your own work.

This toolkit and its corresponding resources are not meant to be exhaustive but rather provide an initial foundation of principles and practices that can be adapted in collaboration with communities themselves. There is no one-size-fits-all approach. Each community has unique needs that must be considered before and throughout engagement. Ultimately, communities themselves should inform the engagement approach in an iterative way. As with any project, you should refer to your own institutional policies and resources before engaging community members in research.

# How can I meaningfully engage community members?

## Meaningfully engagement is an ongoing process of shared decision-making, not a one-time consultation.

The timing of community engagement will vary by project, but a guiding principle is to engage as early as possible. Ideally, community members should be integrated across the research cycle, from shaping study questions to interpreting results and planning dissemination, not after most decisions have already been made. This requires willingness to co-create and adapt plans based on iterative feedback, supported by intentional structures for feedback that allow community input to inform study design, analysis and knowledge mobilization plans.

Community members should be fairly compensated for their expertise and time, just as other research collaborators are, and this requires time, resources, budget and preparation, including funding set aside for honoraria, food, travel, childcare or other supports that make participation accessible. If your project does not have the necessary resources for engagement across all phases, consider building engagement into dissemination and knowledge mobilization activities, where community members can still shape how findings are shared and applied.

The following visual tool draws on two established resources: the Supporting Equity-Centred Engagement Guide (SECEG) developed at McMaster University and the Equity in Engagement Framework from Health Quality Ontario. The SECEG outlines practical steps for embedding equity into health research by addressing power imbalances, promoting transparency and fostering inclusive practices throughout all stages of the research process [18]. The Equity in Engagement Framework provides guidance for planning and evaluating engagement activities, emphasizing the importance of setting clear goals from the outset, providing appropriate supports such as training and resources, and assessing engagement at multiple points to ensure it is meaningful rather than limited in scope [19]. We were also informed by the University Health Network's Resource Guide for Patients and Community Members [20]. This guide helped shape our emphasis on plain language, transparency and practical supports that can be adapted across research contexts. Drawing on these approaches reflects our intention to create a resource that is accessible and usable by both researchers and the people they seek to engage.

These resources informed the principles and structure of this toolkit. Rather than replicating either framework, we adapted their concepts to meet the needs of a research-focused audience and extended the approaches to address other considerations related to implementation and evaluation. These tools were selected because of their collaborative development processes and strong emphasis on equitable engagement practices.

As you move through the sections, it is important to recognize that community engagement is an ongoing and iterative process. You may return to earlier phases as new questions emerge or as community priorities shift. This toolkit is designed to be flexible: use what is most relevant to your current stage of work, revisit sections as your project evolves and adapt the suggested resources to fit your context. A full list of recommended readings that broadly informed this resource can be found on page 35.

Taking the time to engage meaningfully throughout the research process is essential. Skipping steps or limiting engagement may affect trust and relationships with community members, reduce the relevance of research outcomes and raise ethical concerns. Following the practices outlined in this toolkit can help support respectful partnerships, strengthen research impact and promote more equitable and responsible research processes.

# Pathway to meaningful community engagement

## Legend

### Prepare →
- Educate yourself on structural inequities
- Reflect on your role and position
- Recognize that lived and living experience is valid expertise

### Plan →
- Determine who you want to engage and why
- Determine resources and compensation needed
- Proactively and collaboratively set goals and process-norms

### Connect →
- Establish trust and build meaningful relationships
- Meaningfully include diverse voices while avoiding tokenism
- Identify and eliminate barriers to engagement

### Engage →
- Communicate openly
- Respect and value community members and their needs
- Address power imbalances and empower community members to lead

### Sustain →
- Act on community input and follow up
- Maintain relationships and continue to build trust
- Reflect jointly on the future direction of the partnership

### Evaluate →
- Define success with input from community members
- Check in on progress and adapt together
- Use findings to strengthen future engagement

# Prepare

## What does it mean to ‘prepare’ for community engagement?

Before reaching out to community members, it’s important to look inward. Academic–community partnership often starts within systems shaped by power imbalances, even when everyone involved has good intentions.

Preparing for engagement means reflecting on how our own environments have shaped our assumptions about expertise, professionalism, timelines and decision–making. Institutions often value speed and outputs, while communities may prioritize relationship–building, trust and shared decision–making. Neither approach is wrong, just different. Personal experiences, identities and cultural backgrounds also influence how we communicate and interact with others, often in ways we may not realize. By examining our own values, expectations and tendencies, we can become more aware of the assumptions we bring into partnerships.

**Reflection point**

**Research and medical institutions can be part of the problem**

Our intentions may be good, but consider how community members may (rightfully) be cautious and skeptical. “Statistics, as a lens through which scientists investigate real–world questions, has always been smudged by the fingerprints of the people holding the lens. Statistical thinking and eugenicist thinking are, in fact, deeply intertwined, and many of the theoretical problems with methods like significance testing—first developed to identify racial differences—are remnants of their original purpose, to support eugenics.” –**How Eugenics Shaped Statistics**

# Prepare

## Educate yourself on structural inequities

Communities have lived (and continue to live) with structural and socioeconomic barriers that shape power, prestige and access to resources and opportunities. This systematic exclusion from opportunity is sometimes broadly referred to as 'marginalization' and can create health inequities: avoidable and unjust differences in health outcomes. Early in your project preparation and planning, reflect on and seek to understand how structural inequities may influence all phases of the project and engagement. You should be mindful of well-intentioned but harmful narratives ('my expertise will save this community'), where academic expertise is positioned as the primary driver of change. This may inadvertently reinforce power dynamics, where academic incentives drive priorities and community information is extracted for academic career advancement (with little benefit to community members themselves). Instead, engagement grounded in solidarity means acting as a partner and co-learner, recognizing that those most affected by inequities are best positioned to identify meaningful solutions. Use your position of power as an academic and expertise in scientific methods to benefit your partners in the community.

Thoughtful framing around structural causes and community strengths signals respect and awareness. For example, instead of framing a study around individual risk behaviours, a structural frame might focus on housing affordability, income inequality or disinvestment in neighbourhood services. A strengths-based frame would further highlight how community knowledge, connectedness or other attributes have enabled resilience despite these structural challenges, considering these strengths as valuable assets when brainstorming possible research questions or intervention programs.

### Deeper dive

**Why am I always being researched? →**

This guidebook from Chicago Beyond explores privilege and power dynamics in research. Sections with suggested actions are tailored for researchers, funders and community.

### Reflection point

**Structural discrimination (like racism, sexism, classism and ableism) intersect and compound to perpetuate inequity**

Health is impacted by a complex web of social, economic, environmental and political factors that are built into the structures of society and conditions of daily life. The **World Health Organization report on Social Determinants of Health Equity** includes a Figure 1 diagram that provides a foundational overview of these. Think carefully about which distinct concepts (e.g., **race vs ethnicity vs ancestry**) you aim to interrogate in your project and how you plan to proxy these.

## Reflect on your role and position

Everyone has implicit biases; it's a normal part of being human. Take time to reflect on what yours might be, what kinds of assumptions you might have unconsciously internalized and how these subconscious beliefs or habits could be barriers to engagement.

Immersing yourself in the historical and present realities of the community you hope to engage can help orient you to where/how community context may differ from your own lived experience, supporting you to be more thoughtful about different elements of how you engage. This may include attending community events, listening to community-run podcasts, watching documentaries or reading work by community writers and artists. Learning from stories shared in community members' own words can deepen your understanding beyond academic sources alone.

You may also identify engagement skills as a gap in your knowledge and experience. Build your comfort and capacity by joining communities of practice, attending community-focused conferences or learning from others with experience in community-engaged research (e.g., the Edwin S.H. Leong Centre for Healthy Children's Community Engagement Series).

### Deeper dive

**Unpacking the Invisible Knapsack →**

This short list visibilizes privilege via "I can" statements as examples of advantages that those who hold them rarely think consciously about. What privileges do you have that members of the community you want to work with may not? Might this affect the assumptions you make in your work?

# Prepare

## Recognize that lived and living experience is valid expertise

Integrating multiple ways of knowing – including community knowledge, not only quantitative or epidemiology approaches – leads to insights that are more grounded in reality than academic methods alone.

Involving community members early in the project (i.e., at the grant-writing stage) can help build relationships, strengthen the proposal and make sure that community members are included in decisions about how funding will be used. Where possible, invite community members into the team early, offer (though don't force or require) opportunities to participate throughout, be transparent about constraints and recognize their expertise and contributions. The same principles outlined throughout this toolkit apply to grant development: meaningful engagement, mutual respect and shared decision-making lay the foundation for stronger partnerships over time.

**Deeper dive**

Community engagement for health equity →

This guide introduces authentic community engagement and its essential role in public health.

# Prepare

**Take action!**

Reflect on your readiness.

The goal of the ‘prepare’ phase is to understand your positionality, power and assumptions to prepare you to start relationships with humility, transparency and an awareness of how research can reinforce inequities. You may find it helpful to use these prompts for self-reflection and to guide discussions with your project team.

You may find it helpful to use existing tools that support early reflection on roles, power and readiness before beginning relationship-building with community members. The Designing and Assessing Inclusive and Systematic Co-Production (DAISY) Framework offers guided prompts to help you think through decision-making, compensation and how roles will be shared in an equitable way. The Guidance for Reporting Involvement of Patients and the Public (GRIPP2) checklist, although originally created as a reporting tool, can also be used during planning to clarify your purpose and the level of involvement community members will have in shaping the research. These tools are useful activities to complete early in the process to support transparency and intentional engagement.

## Checklist

### Your role and readiness

- [x] I understand what community engagement *is not* (i.e., asking for letters of support).
- [ ] I understand what community engagement *is* (i.e., shared decision-making, relationship building).
- [ ] I can clearly explain why I want to engage (not “because the grant requires it”).
- [ ] I understand that meaningful community engagement requires time and ongoing relationship-building.

### Positionality (power and privilege)

- [ ] I have reflected on my identity, privileges and lived experience (what I assume, what I don’t know).
- [ ] I recognize that community members may have valid mistrust based on past harm from research.
- [ ] I can name how power currently sits (institutional authority, control over budget/data/timelines).

### Team preparedness

- [ ] Our team agrees on why community engagement is needed (not one person advocating for it alone).
- [ ] We have discussed how we will deal with discomfort or pushback.
- [ ] If community engagement shifts our research plan, we are ready to change direction.

# Plan

## What does it mean to ‘plan’ for community engagement?

Think through a plan for the entire project lifecycle prior to project onset. Many activities for meaningful engagement may have implications for your budgets and timelines, and looking ahead will help you to integrate these pieces into grant applications.

If your institution has an engagement office, community partnerships unit or similar infrastructure, consider connecting with them early, as they can provide guidance, tools and support for building and sustaining these relationships. That said, meaningful community relationships require responsiveness to evolving community input and needs. Build flexibility into your timelines whenever you can and treat your plan as iterative: revisit throughout execution and adjust as needed.

# Plan

## Determine who you want to engage and why

It is essential that relationships you establish with community members are authentic, respectful and grounded in mutual trust, not only built for the purpose of securing a grant. Community engagement should never be treated as a transactional step or a box to check. Instead, relationships should be approached as a long-term partnership that extends beyond any single funding opportunity. Consider existing relationships you have that may serve as a starting point, including at your institution or through other researchers who have experiences working with communities. Community organizations can also be an important entry point when a research team does not have established relationships, particularly during early project and grant development. However, the intention should always be for researchers to take responsibility for building and sustaining their own relationships with community members over time. When reaching out, be clear about what you are proposing, what you are asking of people and what is and is not possible within a project. Community members also may hold intersecting identities (for example related to race, gender, disability, income or migration status) that shape how they experience research and engagement opportunities. These realities can introduce additional challenges to community involvement, trust or capacity, so they may require more flexible, responsive and inclusive engagement approaches.

### Deeper dive

Centering Equity in Planning: mapping and goal-setting →

This resource prompts questions to identify equity-deserving groups that must be engaged, supports you to consider the barriers these residents face, outlines tactics/strategies for reducing them and for considering how you can set and monitor goals.

## Determine resources and compensation needed

Planning for resources, compensation and roles from the outset helps support equity, avoid delays and demonstrate respect for community members' contributions. Consider the time and funding needed to build new relationships (like travel for in-person visits to rural or remote areas) as well as to support engagement activities (meeting materials, accommodations, translation services and more). Consider how engagement activities will be facilitated and sustained by the research team. Depending on the level of engagement, an existing team member may take on this role, or you may need to hire a dedicated staff member or peer researcher. Having a consistent point of contact can help build trust, strengthen relationships and provide community members with a clear and reliable connection to the project.

Compensating community members helps acknowledge their time, expertise and contributions. This may include reimbursing expenses (incurred for childcare, transportation, etc.) as well as additional compensation for participation. The form of compensation should be discussed and determined collaboratively based on community members' preferences and needs. Options may include an hourly rate, a lump sum payment, a one-time honorarium or gift cards. Compensation rates may vary and are often informed by the local living wage, the role and level of responsibility community members take on, what is agreed upon together and institutional payment processes or timelines. In many contexts, hourly rates may fall within the range of $20 to $50 per hour. Some members may also value additional non-monetary benefits such as training opportunities, shared authorship, networking or other forms of mutual benefit. When partnering with community-based organizations or agencies, additional considerations may apply. Organizations may require compensation that reflects staff time, administrative costs or broader institutional contributions, which may differ from compensation provided to individual partners.

### Deeper dive

Budgeting for engagement →

This brief article outlines and explains budget items for consideration. See also an accompanying budget template.

### Case example

**Considering issues of accessibility**

"[Partners] experiencing social marginalization may need··· financial honoraria upfront··· [and] may require researchers and policy makers to arrange additional resources such as tablets (as well as arranging internet access)··· Consideration of additional barriers to participation, such as working conditions and home and child care responsibilities, will enable researchers to remain dynamic and responsive to the needs of [partners] in a way that will facilitate diverse participation." – Read more from Sayani and others about Building Equitable Patient Partnerships during the COVID-19 Pandemic.

# Plan

## Proactively and collaboratively set goals and process-norms

Establishing a shared vision for how community members will be involved in the research is an important early step to avoid tokenism. Before engagement begins, consider the resources, timelines, ethics requirements and budget available, and be transparent about these constraints when speaking with community members. Ask community members about their desired level of involvement, what support they need to participate and how they would like decisions to be made. Engagement plans should reflect community priorities, availability and capacity – not just the needs of the research team.

Depending on the engagement level, some goals may be co-created once the partnership is underway rather than predetermined by the research team. If certain aspects of the project are already fixed (such as data access, ethics constraints or funder requirements), be transparent about these from the outset.

You will also need to co-design your decision-making process. Deliberative structures should be designed to address power imbalances. For example, making plain language the norm, allowing ample time for discussion and creating multiple ways for people to share their views (speaking up directly vs anonymous written feedback).

Finally, consider how you will assess whether the engagement approach is working. Begin thinking about the types of observations that would demonstrate shared goals were achieved. These can be refined with community members later to make sure that the process remains accountable to what was agreed upon at the start.

### Reflection point

**'Engagement' has a broad spectrum of intensity**

When deciding on the level of engagement for your project, it can be helpful to draw on frameworks such as the International Association for Public Participation (IAP2) Spectrum of Public Participation and the adapted i2S Stakeholder Engagement Options Framework (the latter which may be more applicable for community engagement specifically). Not all research projects require the same level of engagement, and the appropriate approach will depend on your goals, timeline and available resources. Being clear about the intended level of engagement helps set realistic expectations with community members about how they will be involved and discuss options that will fit community priorities, timelines and available resources.

**Increasing community member influence on the research →**

| Inform | Consult | Involve | Collaborate | Support |
|---|---|---|---|---|
| Researchers provide community members with balanced and objective information to assist them in understanding the research. | Researchers obtain feedback on the research. | Researchers work directly with community members to ensure that concerns and priorities are consistently understood and considered in the research. | Researchers develop equal partnerships with community members to undertake the research. | Researchers provide input as requested by community members in community-led research. |
| We will keep you informed. | We will keep you informed, listen to and acknowledge your concerns and aspirations and provide feedback on how your input influenced the research. | We will work with you to ensure your concerns and aspirations are directly reflected in the research and we will provide feedback on how your input influenced the research. | We will include you as an equal partner in designing and conducting the research. | We will provide advice and assistance as requested to help you design and conduct your research. |

# Plan

**Take action!**

Document your project scope, roles, budget & expectations.

The goal of the 'plan' phase is that expectations, influence, timelines and compensation are explicit and equitable. Use these prompts to help you and community members co-design how you will work together.

A fillable and printable Engagement Planning Worksheet is available to support researchers in preparing and planning for community engagement. Completing the worksheet is a helpful activity to think through decisions, timelines and roles before reaching out to community members.

## Checklist

### Who and why

- [x] The community group(s) are clearly defined (not broad terms such as "vulnerable populations" but specific groups, like "high school youth advocating for mental health supports").
- [ ] We can explain what decisions community members have opportunities to influence (i.e., refining research questions, interpreting results).

### Resources and compensation

- [ ] We have budgeted for honoraria for partners that is aligned with living wage.
- [ ] We have additional budget for supports that may be needed by partners: transportation, childcare, food, accomodations, translation, supplying technology like internet modems or laptops or others as needed.
- [ ] We have decided how and when community members will be compensated, and we have a dedicated individual on the team (or in our institution) to assist with the process.

### Engagement design (how decisions will be made)

- [ ] We discussed and agreed on decision-making (consensus? vote? shared leadership?).
- [ ] We have co-developed expectations: time commitment, deliverables, flexible participation.

### Boundaries and non-negotiables (transparency)

- [ ] We have identified what is fixed (ethics restrictions, data access).
- [ ] We have identified what is flexible (methods, interpretation, dissemination).

# Connect

## What does it mean to ‘connect’ when it comes to community engagement?

Connecting is about establishing trusting, meaningful and sustained relationships before diving into formal engagement. This requires an upfront investment of time and resources but is essential to establishing deep and reciprocal relationships.

Connecting involves recognizing whether a community or organization is in a position to engage at that time. Not all community members will have the capacity, interest or resources to take on a research partnership, and respecting that is part of ethical and respectful engagement. Connecting may look different depending on the community you are engaging and the extent to which they know you or your institution already.

**Reflection point**

**Actions to foster trust-based relationships**

1. Knowing community history
2. Giving back
3. Exchanging knowledge
4. Institutional ethics
5. Having local contacts
6. Communicating
7. Respect
8. Good manners

Heather Sauyaq Jean Gordon (Iñupiaq) & Deana Around Him

# Connect

## Establish trust and build meaningful relationships

Early work to build relationships and create informal dialogue with community members or groups (before beginning your research) is a critical step in building trust and showing your commitment to reciprocity. Conversation about community should happen with the community, in the community. It's important to let go of your 'neutral research expert' hat when you connect with community members and instead be upfront and honest about your motivation for this work, how it fits into your professional agenda and your fears and uncertainties about next steps. Acknowledge that you do not have all the answers but provide a plan on how you will answer questions as they arise.

Building relationships also means more than scheduling meetings or collecting feedback. It involves showing up, spending time in the community and learning about what matters to people in their daily lives. In some cases, this may include supporting community priorities that are not directly tied to your research, such as helping connect people to services, sharing resources or participating in community activities. Taking time to invest in the community in these ways signals that the relationship matters beyond a single project or grant. If this step is rushed or skipped, engagement risks becoming one-time and transactional rather than grounded in mutual respect and long-term partnership. Consider what extra steps you may want to take during the process of building relationships.


**Case example**

Integrating Youth Perspectives in Community-Based Approaches to Child Maltreatment →

Dr. Nicole Racine and youth partner Katelyn Greer describe how they took a partnership approach with youth, transitioning from treating youth research 'participants' to instead 'co-investigators' or 'consultants.' They paid careful attention to addressing power imbalances throughout their work.

## Meaningfully include diverse voices while avoiding tokenism

No engagement can fully represent the entire breadth and depth of community experiences, especially when you consider the many intersecting identities within any given community. Rather than trying to represent every identity, you should consider which perspectives are important to reflect in your research and how you can ensure there is space for those perspectives. It is also important to recognize that many communities, particularly those who have been marginalized, have experienced real harm from past research, including being misrepresented, excluded from decision-making or having their knowledge extracted without benefit. This history means that mistrust is real and understandable, and it must be acknowledged and addressed through transparent, respectful and relationship-based engagement.

Recruitment practices may unintentionally perpetuate existing systems of power and discrimination, favouring those with certain privileges, access and knowledge. If possible, you should co-design the recruitment strategy with community members (with whom you have built informal relationships already, as described above). Actively connecting with and snowballing from your contacts' networks helps spread the word to folks whose voices might otherwise be underrepresented in research and decision-making. As much as possible, aim to recruit multiple individuals to avoid tokenistic pressure on one individual to reflect their whole community.


**Deeper dive**

Tokenism: seeing it, fixing it →

This article describes examples of tokenism and offers suggestions to address.

# Connect

## Identify and eliminate barriers to engagement

Barriers to community engagement can limit who is able to participate and inadvertently fracture trust in relationships. Early in the process, reflect with community members on both physical barriers and cultural considerations that are important to address. For example, complicated or long forms may automatically exclude those with a lower level of education, and online-only forms may exclude those without a computer or mobile device. Be thoughtful about your engagement locations, times and strategies to account for a variety of needs. If an activity is in-person, cover travel costs, loss of wages, and childcare upfront and consider options for community members to stay overnight if the travel is particularly taxing. Offer multiple modes of engagement to suit different comfort and accessibility levels through virtual, hybrid and in-person formats.

In addition to logistical barriers, it's also critical to reflect on potential risk to psychological wellbeing, such as that posed by resurfacing traumatic experiences when sharing lived expertise. This is especially important given the real and documented harms that research has caused to communities of colour and Indigenous communities. Consider investing in training for your project team members on trauma-informed approaches, specifically to help with the facilitation of sensitive discussions. Specific strategies to support psychologically safer environments may include building in adequate breaks between planned activities, modelling a no-expectations approach that allows all partners to 'pass' and maintain their privacy if/when they choose, offering opportunities for private debriefing and when feasible, ensuring that all members have access to professional supports that are free of charge (e.g., appropriate helplines, employee assistance programs, social workers and other supports).

### Case example

MOV

**Engaging children with disabilities and their families in research and practice →**

Dr. Timothy Ross defines and provides examples of ableism. He describes and provides examples of art-based methods, enabling technologies, considerations around transportation and other strategies that can be used to dismantle ableism and reduce barriers to engagement.

### Deeper dive

PDF

**Recruiting for diversity →**

This guide provides concrete actions that can reduce barriers to recruitment and engagement.

# Connect

**Take action!**

Plan for building relationships.

The goal of the 'connect phase' is to build trust and rapport before discussing tasks or deliverables related to the research project. Trust is established through repeated, consistent and relational interactions. Discuss these prompts with your project team and use them to help guide a written engagement plan that considers how you will start building meaningful relationships. Revisit the prompts periodically to reflect on whether these relationships are being fostered and nurtured appropriately.

**When we spoke with members of the ICES Public Advisory Council, they had the following tip for researchers who are connecting with community members:** "Can we get to know you a little bit? Why are you interested in this issue? What got you here? Are you involved in the community outside of research? Just share with us a little, your personal or professional story and who you are outside of the 'alphabet of titles'. Walk with us, beside us." – The ICES Public Advisory Council

## Checklist

### Building connection

- [x] We met people where they are (their space, their events, their communities).
- [ ] We opened space for conversation about their priorities, not just our project.
- [ ] We shared why this matters to us personally (not only professionally).

### Accessibility and inclusion

- [ ] Meeting formats and times were set based on community members' preferences (not our convenience).
- [ ] We planned for accessibility: interpreters, American Sign Language, plain language, mobility needs, etc.
- [ ] All communication was jargon-free and provided in advance.

### Psychological safety

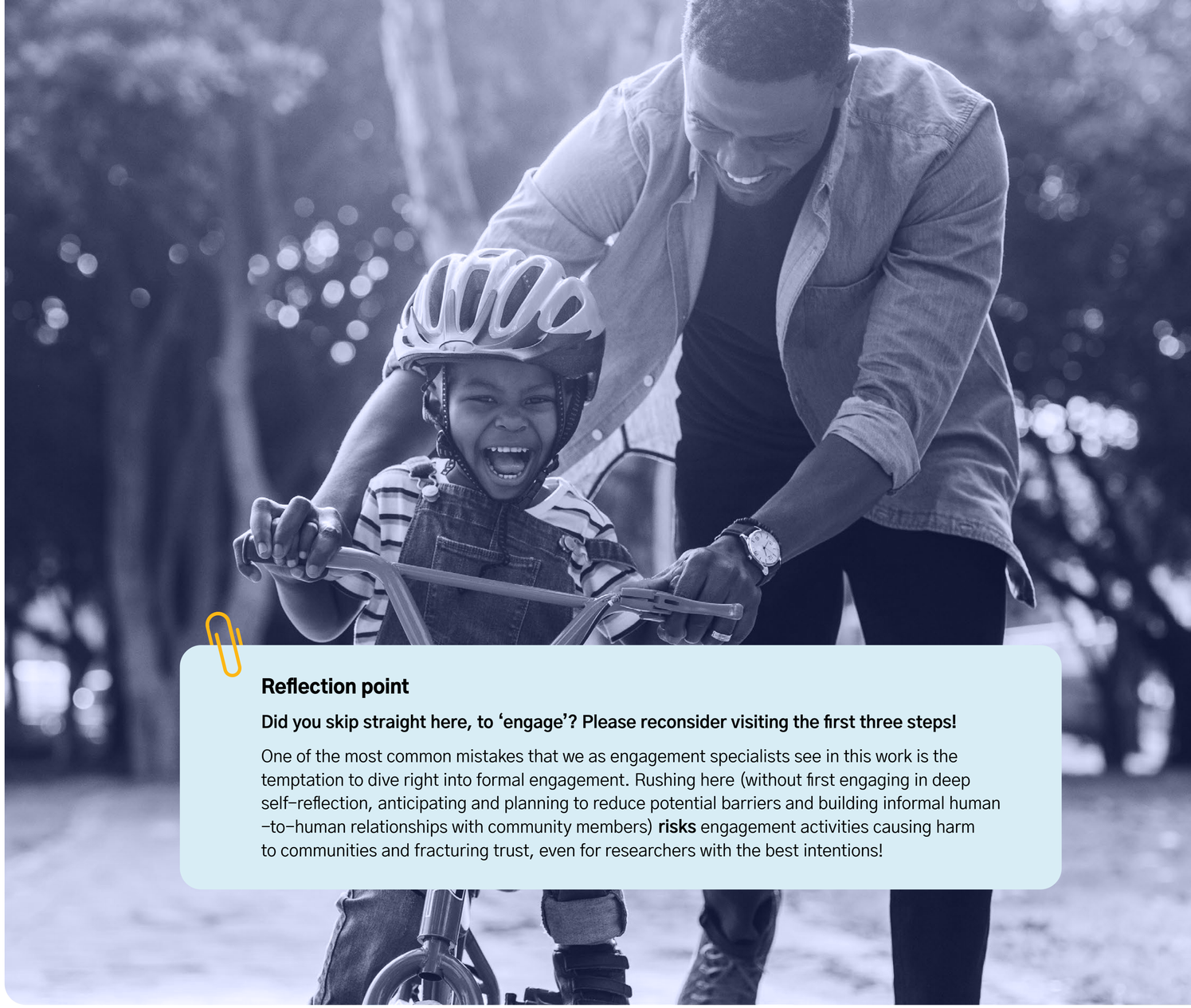
- [ ] We acknowledged any potentially triggering topics and offered opt-outs.
- [ ] We provided mental health supports or debrief options.
- [ ] We explicitly stated: "You do not have to share personal experiences to be a member of this team."
- [ ] We explained what decisions they will influence (i.e., refining research questions, interpreting results).

# Engage

## What does it mean to ‘engage’ in community engagement?

Once you have started to build relationships with community members, you can think about how to partner effectively within the scope of your project. Meaningful engagement is an ongoing process and requires an understanding that the community members you are working with should be considered equal partners in your project.

Transparency and accountability are cornerstones to community engagement and informal process evaluation and monitoring of your approach allows you to pivot and adjust as needed.



**Reflection point**

**Did you skip straight here, to ‘engage’? Please reconsider visiting the first three steps!**

One of the most common mistakes that we as engagement specialists see in this work is the temptation to dive right into formal engagement. Rushing here (without first engaging in deep self-reflection, anticipating and planning to reduce potential barriers and building informal human-to-human relationships with community members) **risks** engagement activities causing harm to communities and fracturing trust, even for researchers with the best intentions!

# Engage

## Communicate openly

It is important for research teams to communicate at every step of the process to support all team members to fully understand and meaningfully contribute to discussions. Create space for respectful and ongoing exchange to make space for community members to share how they feel the work is going, how relationships are developing and how they are feeling about their involvement. Different community members will prefer to engage in different ways, and these preferences should be discussed and agreed upon early in the partnership. For example, some people may prefer email for updates, while others may prefer text messages, group chats or phone calls. Community members who are less comfortable speaking in groups or who need more time to process information may prefer written surveys, one-on-one check-ins or opportunities to provide feedback after meetings. When engaging with your community members, make sure you spell out any acronyms and use plain language as much as possible, and understand their literacy levels, language differences (e.g., if you are using an idiom, make sure it is widely understood) and access to technology, as these can affect how people receive information and feel able to participate.

If there are areas of the project that are already decided or where there is limited opportunity for community influence, it is important to be transparent about this from the beginning. For example, some types of data may not be available, or some methods may be required by ethics or funders, so it is important for you to be clear about what is fixed and what can be shaped by community members' engagement. Develop a clear, honest and mutually beneficial agreement and plan with community members and organizations with whom you are engaging, and be as transparent as possible about potential funder deadlines, institutional pressures and costs.

**Deeper dive**

Community engagement techniques →

This guide describes various methods to facilitate engagement, organized by level of depth.

## Respect and value community members and their needs

Throughout your engagement with community, it's important to emphasize "working with" (rather than "doing for") community members and focus on sharing decision-making, co-designing processes or relinquishing decision-making entirely (when feasible). This process could look different depending on the needs, priorities and capacity of community members (e.g., some groups may want to be actively involved in both co-designing and co-producing, whereas other groups may want to decide together but not be responsible for actioning the decisions). As alluded to in the "Plan" phase, it's important to include this in your initial discussions (through a combination of informal open dialogue or even more formally through a written survey) to ensure that individuals are contributing in ways that feel appropriate for them and that can be adequately supported.

Both community agreements and terms of reference help to ensure members' needs and values are documented and agreed upon. A community agreement is a shared, values-based document that sets out how people agree to work together with respect, safety and trust. Community agreements often outline expectations around communication, decision-making, confidentiality, cultural protocols and how disagreements or harm will be addressed. They are written in plain language and can be revisited or revised as relationships and the work evolve. Many projects start with a community agreement to build trust and then layer in terms of reference when more formal governance is needed later. A terms of reference document provides structural clarity and accountability by outlining shared purpose, respective roles and responsibilities, membership term and meeting frequency, compensation, timelines and reporting relationships. Regardless of which or whether both approaches are used, the documents should be co-created with community.

**Deeper dive**

Flipping orthodoxies to design inclusive meetings →

This template prompts planners to challenge status-quo practices and assumptions.

# Engage

## Address power imbalances and empower community members to lead

If community members want a more active role in your project and greater decision-making power (and this aligns with what your project can support), it is important to be willing to share authority and create real opportunities for community members to shape the research. This can include involving community members in decisions about what outcomes matter most, how data are interpreted or how findings are shared. Clearly lay out roles and responsibilities in your project to ensure community expectations are aligned: for example, indicate who is acting as the Principal Investigator and what are their responsibilities; who will help to facilitate meetings and communication with community members; and emphasize that community members are part of the research team and work collaboratively with them to define roles that reflect their interests, expertise and desired level of involvement. You should also consider the supports needed to enable meaningful involvement, such as tailored orientation to the project, informational materials written in plain language or additional training where appropriate. In many cases, we recommend investing in capacity building, such as facilitation training, mentoring or resourcing, so that community members have the support they need to take on leadership roles in the work.

It's also important to demonstrate 'small wins' or how member feedback contributed to decisions as part of your commitment to transparency and accountability in the ongoing relationship. During this phase, you could also include checkpoints to revisit the process, monitor how the relationship is evolving and discuss challenges or the need for changes based on community preferences.

### Deeper dive

Co-creation for power-sharing →

This prompts planners to consider where power can be shared with community.

### Case example

Community-engaged ICES research with Dr. Hilary Brown and Laurie Proulx →

Dr. Hilary Brown and Laurie Proulx co-present both the qualitative and quah outcomes and and care experiences of people living with disabilities in Ontario. They reflect on how **public partners had input and decision-making power** during the research process.

# Engage

**Take action!**

Build inclusion into your engagement plan

The goal during 'Engage' is to ensure community members feel heard, valued and encouraged to lead. Discuss these prompts with your project team and use them to help guide a written engagement plan that considers key best practices.

**When we spoke with members of the ICES Public Advisory Council, they had the following tip for researchers who are engaging with community members:** "If there is a delay during the research process, let us know. Don't wait 365 days to come back to me. There was a research group [I was part of] that met very infrequently, like once a year. I don't remember any circle back of our feedback and then I think the project ended without anyone telling us. Bad communication!" – The ICES Public Advisory Council.

You may also find it helpful to draw on existing tools that support co-design, shared decision-making and transparency throughout the engagement process. The Patient-Centered Outcomes Research Institute PCORI Engagement Plan Worksheet offers guided prompts to help teams identify roles, determine how decisions will be made and assess whether engagement is meaningful and reciprocal.

## Checklist

### Onboarding and supporting full participation

- [x] We held a kick-off meeting and co-created a community agreement and/or terms of reference; and pre-determined preferred communication methods between meetings (text, email, WhatsApp).
- [ ] We provided orientation that was written in plain language and conducive to the language and literacy needs of the group (e.g., online platform tutorial, outlining stages of research, a glossary of terms, etc.).
- [ ] We assessed the needs and values of our partners and if necessary, have found opportunities for them to build further leadership capacity in areas relevant to the work (e.g., facilitation training, peer mentorship, etc.)

### Transparency and sharing decision-making

- [ ] We built in power-sharing if desired by the group or certain members (e.g., rotation of meeting facilitation, shared agenda setting, transparency around decision-making).
- [ ] We have been clear on the roles and responsibilities of everyone on the team, so there are no surprises or misinterpretations.
- [ ] We check in regularly on process, not just assigned tasks ("How are we working together?").
- [ ] Our decision-making processes were clear and transparent.

### Documenting, reflecting and closing the feedback loop

- [ ] We have documented key decisions and contributions and shared back with the group.
- [ ] Feedback loop was explicitly acknowledged and acted on: "You said _____, we adjusted _____."
- [ ] We reflected together on what is working and what needs to change.

# Sustain

## What does it mean to sustain relationships in community-engaged research?

Sustaining relationships means recognizing community members as long-term partners whose contributions extend beyond a single project or funding cycle. Community engagement does not end when data collection or funding ends. It involves maintaining reciprocity, such as continuing communication, supporting community-led priorities or initiatives when possible and sharing relevant opportunities, resources or updates that may benefit community members. It also means considering community members in the same way you would academic colleagues by valuing their time, knowledge and ongoing contributions.

Planning for sustainability should begin early in the project. Discussing expectations, long-term goals and post-project communication from the outset helps prevent relationships from feeling transactional and supports trust, ethical practice and meaningful partnership over time.

# Sustain

## Act on community input and follow up

Work with community members to decide how data and metrics are shared in ways that are respectful and minimize potential harm. Remember that numbers alone often do not capture the full picture of what is happening at a community level. Invite community members to help interpret and share findings and consider co-creating outputs beyond academic papers that are more accessible, such as infographics, webinars or community reports.

It is also important to recognize that communities are not all the same. Different members may hold different or even conflicting perspectives. When this happens, consider using consensus-building or prioritization activities to help guide next steps while making space for all viewpoints to be heard.

Provide regular updates and share outcomes with community members. Show how their feedback was used and how it informed decisions or actions. Checking interpretations and recommendations with community members can help ensure their perspectives are represented accurately. Sharing small wins and signs of progress can help build trust and maintain momentum. If recommendations cannot be implemented, explain why openly and explore alternative options together, including how the feedback may inform future work.

### Deeper dive

A Manifesto for ethical research in the downtown Eastside →

This guide describes community expectations for reciprocity.

### Case Example

Community-engaged ICES research with Dr. Susitha Wanigaratne and Manvir Bhangu →

Dr. Susitha Wanigaratne and Manvir Bhangu describe lessons learned around best practices, successes and challenges of working in a **sustained academic-community partnership**. They demonstrate how community partnerships improved the **contextual richness of their research** and improved the **effectiveness of knowledge translation activities**. They also demonstrate how community partnerships can amplify the benefits of research and mitigate the harms of policies that are influenced by research.

## Maintain relationships and continue to build trust

Follow through on any commitments you made to community members: trust is about trustworthiness, and keeping your promises is an absolute must. Make sure to clearly describe in reports, papers and to the community members themselves how their input made a difference. Include partners in conference presentations, publications and other dissemination activities.

Consider the long-term implications of the relationship and whether ongoing communication beyond the formal term of the project timeline is desired by both community members and the research team. The conclusion of one project may create opportunities for future collaboration, including new projects shaped and led by community-identified priorities from the outset.

### Case Example

Planting the seeds of sustainable engagement with Raissa Amany and Stacie Smith →

This workshop focuses on engaging young people in meaningful, long-term research projects. It provides an overview of best practices for ensuring sustainable youth engagement, along with tools and resources for evaluating youth involvement in research.

### Deeper dive

Community engagement for health equity →

This seven minute video describes best practices for building authentic relationships.

# Sustain

## Reflect jointly on the future direction of the partnership

Not all partnerships will continue in the same form beyond a specific project. Check in with all partners to reflect on the future of the relationships and, if relevant, succession planning for the work. There are many possible reasons why one partner may want to step back from collaboration in part or in full: 'life happens' and can change community members' capacity, interests or priorities. Researchers may also be subject to external pressures that shift project funding or scope. Decisions about how a partnership evolves should be guided by open communication, transparency and shared decision-making (rather than institutional or funding timelines alone). Create opportunities for outgoing members to provide frank comments on their reasons for stepping away: though difficult to hear, the feedback that someone was made to feel unsafe or unwelcome on our teams provide us the opportunity to make an intentional change in our facilitation and engagement strategies.

When a project comes to a close, or when a community member chooses to step back, we have a responsibility to bring the work to a thoughtful and respectful pause. This includes returning findings in accessible and meaningful formats, expressing appreciation for the knowledge and time shared and supporting continuity where appropriate, such as by sharing resources or making introductions to others who may continue the work. Approaching transitions in this way helps preserve trust, honours contributions and keeps the door open for future collaboration when and if it aligns with community priorities.

# Sustain

**Take action!**

Discuss the future of relationships.

The goal of the ‘sustain’ phase is to maintain relationships responsibly and/or close the project respectfully to make sure that the benefits flow back to community, not just to researchers. Use these prompts to guide a conversation with community members about their goals and priorities beyond the project.

As you move through the stages of your research study, it can be helpful to use tools that prompt intentional closure and support the continuation of relationships beyond the formal end of the work. The Sustaining the Work or Initiative Tookit from the Community Tool Box at the University of Kansas offers practical guidance on how to wrap up partnerships respectfully, including discussing whether and how the relationship will continue.

## Checklist

### Reciprocity and return of benefits

- [x] We shared findings with community members in usable formats (e.g., plain-language summaries, infographics, presentations to the community, etc.).
- [ ] We offered community members opportunities for future involvement (e.g., conference co-presentations, letters of support, skill development opportunities, etc.).

### Closure with care

- [ ] We held a final meeting to confirm what was completed and what remained outstanding.
- [ ] We fulfilled all of our commitments to community members, with no unpaid labour or unaddressed promises (e.g., payments were processed and follow-ups were completed).
- [ ] We asked community members whether they wished to stay connected and how they preferred to maintain contact.

### Shared future planning

- [ ] We used community members’ input to inform next steps or future research priorities.

# Evaluate

## What is community-engaged evaluation and why is it important?

Evaluating community engagement means looking closely at how meaningful, respectful and effective your partnerships and engagement processes were. It involves asking questions such as: How inclusive were our efforts? How were activities experienced by the people involved? Did our work meet community-identified goals and what impact did it have? Community-engaged evaluation works best when it is considered early, right at the planning stage, and not treated as an afterthought.

Early conversations, revisited at different time points with community members help establish shared goals, define what "success" looks like and identify evaluation measures that reflect what matters most to community members. These conversations should include discussion about evaluating both what changed because of the engagement (impact) and how the engagement happened (process).

**Case example**

Applying the core concepts of evaluation engagement →

Dr. Tatiana Bustos is a researcher and facilitator at RTI International's Transformative Research Unit for Equity. Her work includes projects focused on implementation of public health interventions, program development, initiatives for environmental justice and health equity.

# Evaluate

## Define success with input from community members

'Impact evaluation' focuses on the outcomes of a project, including what difference the engagement or research activities made and whether those outcomes align with community-defined priorities. By defining success with community members from the outset, you can make sure that the outcomes you measure are meaningful to the people involved and develop shared expectations around the timeline over which longer term outcomes may be observable (which may exceed the lifetime of a single project). It is important to work with community members to decide which outcomes matter, what indicators best reflect those outcomes and when evaluation should take place. There are many existing tools and checklists to support impact evaluation (see the worksheets section), but selecting or adapting these tools with community members strengthens the relevance and usefulness of your evaluation and provides more meaningful results.


**Deeper dive**

Engagement indicators for health system improvement →

This article describes co-development of indicators to measure engagement. Figure 2 summarizes indicators.

## Check in on progress and adapt together

Community priorities, capacity and contexts can change over the course of a project. In addition to defining success at the beginning, community-engaged evaluation includes regularly checking in with community members to reflect on how the partnership and activities are progressing. These check-ins create opportunities to ask questions such as: Do our goals still make sense? Is the engagement approach working well for everyone? What might need to change in response to shifting priorities or circumstances? Jointly assessing progress throughout the engagement allows researchers and community members to make adjustments as the work evolves rather than waiting until the project ends. Progress check-ins can be informal or more structured depending on community members' preference. They may take the form of brief conversations, short reflection activities or dedicated time during meetings to revisit goals and indicators. What matters most is that these moments support collaboration, openness and responsiveness to community feedback.

## Use findings to strengthen future engagement

'Process evaluation' looks at how engagement occurred, such as what it felt like for community members, what supported meaningful participation and what challenges emerged along the way. While impact evaluation tells what changed, process evaluation helps you understand why and how those changes happened and whether the engagement approach itself was respectful, inclusive and reciprocal.

Tools for process evaluation can include anonymous surveys, informal discussions, reflective journaling, storytelling or group reflections. These approaches help bring experiences, expectations and unspoken dynamics to the surface. Planning for process evaluation throughout the project, not just at the end, allows you to identify challenges early, adjust your approach in real time and strengthen relationships with community members. Being transparent about what is learned and how findings will be used helps build trust, demonstrates accountability, and supports evaluation as a reciprocal process that benefits both researchers and community members.


**Case Example**

Our Data, Our Question: Public-Centric Data Analysis →

As part of a **broader public-led project**, Public Advisory Council members and ICES research teams dedicated time to reflect specifically on process lessons. Learnings have informed how they continue to explore ways to work together in this administrative data analysis, a type of research less explored for opportunities for community leadership.

# Evaluate

As you plan how to evaluate community engagement in your project, we have highlighted six tools you might consider. These tools are offered as examples: you do not need to use all of them. Select the tool or combination of tools that best fits your project and the relationships you have built. The most important part of evaluation is closing the feedback loop with community members, sharing what was learned and using those insights to strengthen future engagement.

## Impact evaluation

1. Engage with Impact Toolkit: provides a step-by-step process to plan, measure and report the impact of engagement activities.
2. Guidance for Reporting Involvement of Patients and the Public (GRIPP2): can be used in academic outputs to describe how community members were involved in the research and what impact their involvement had on the research.
3. Learning Together Evaluation Framework for Patient and Public Engagement (PPE): supports teams in building their own logic model to assess the impact of patient and public engagement over time.

## Process evaluation

1. Research Engagement Survey Tool (REST): measures the quality and extent of engagement in health research projects from the perspective of interest holders involved, with a focus on trust, communication and influence on decision-making.
2. Public and Patient Engagement Evaluation Tool (PPEET): offers a set of standardized surveys to evaluate public and patient engagement in health system organizations and research, allowing for multiple viewpoints to inform the evaluation.
3. Designing and Assessing Inclusive and Systematic Co-Production (DAISY Framework): can be used during evaluation to reflect on equity, power sharing, compensation and representation throughout the engagement process.

# Evaluate

**Take action!**

Evaluate your experience & impact

The goal when evaluating is to measure the quality and impact of engagement, including how people experienced it, whether power shifted and how relationships changed over time (not just 'whether' activities occurred). Use these prompts to reflect with community members and the broader project team on what is important to evaluate and how to plan your evaluation process.

## Checklist

### Co-create the evaluation

- [x] Community members helped define what "success" meant.
- [ ] Community members helped select the evaluation tools.
- [ ] We evaluated process, experience and impact, not only outputs.

### Continuous learning

- [ ] We evaluated at multiple stages (beginning, mid-point, end), not only at the conclusion.
- [ ] We discussed findings collaboratively with community members and the approach was adjusted based on what we learned.
- [ ] We chose evaluation methods that reflected the project context and included approaches such as interviews, focus groups, surveys and other ways of gathering feedback.
- [ ] Community members helped decide what should be evaluated and how, measures of success reflected their priorities and perspectives.

### Sharing the findings

- [ ] We shared results back to community members before sharing with academic audiences.
- [ ] We shared results in accessible formats (e.g., visuals, stories, audio, culturally relevant approaches, etc.).

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