

EQUITABLE COMMUNITY PARTNERSHIPS

A Reflection Tool



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INTRODUCTION

What is the purpose of this tool?

The purpose of this tool is to help teams engaged in community partnerships for research, service delivery, or other projects reflect on how they can make their partnering practices more equitable. The tool consists of five key components or 'dimensions' that contribute to equitable community partnerships: Shared Understanding, Collaborative Decision-Making, Meaningful Representation, Reciprocal Partnership, and Respectful Relationships. Each section will prompt partners to reflect on a different dimension through a series of questions intended to spark conversation around each one. If it is your first time using this tool, we recommend that you take a moment to read through each dimension and consider how it applies to your partnership.

Who is this tool for?

This tool is for members of teams* who are currently planning, or in the midst of implementing, a community-partnered project. Team members include community partners (e.g., community residents or members of community-based organizations), as well as partners representing a diverse range of institutions such as non-profits, academic institutions, government agencies or health care organizations. Team members should have an active interest in achieving social change goals through their work together and fostering equity in relationships with their partners.

**Partnerships take various forms. Your 'team' may be members of a coalition, a network, a committee, a board, or some other structure. Feel free to substitute the term 'team,' 'project team,' or 'partnership' for other terms that make sense in your context.*

When should this tool be used?

We recommend reflecting on the dimensions presented in this tool during key moments of transition in your project life cycle. For example, you may use it to inform the terms and conditions of your partnership when you are first forming it. You may use it when designing your project plan, or during a mid-point evaluation. You may use it after one grant cycle ends and before another begins to prompt reflection on changes your team would like to make in the next phase of implementation. Whatever moment is an appropriate time to pause and reflect on how you and your partners are working together is a good moment to use this tool. Recognizing that reflection is an iterative process, each section includes a question that prompts your team to consider how you will continue the conversation around that topic. It may be helpful to plan in advance the next time you will revisit certain reflection questions, or to establish a regular 'partnership check-up' where you use some of the questions offered here to initiate a reflective discussion.

ASSUMPTIONS

Equitable Partnerships Prioritize Community Power

Interest in community engagement has grown due to critiques that excluding community voices from the planning or implementation of projects leads to solutions that fail to meet community needs or cause harm. Despite increased interest, institutions engaged in social projects — whether academic institutions, government agencies, health care organizations, non-profits, or others — are still largely designed to uphold the leadership and knowledge of outside researchers and technical 'experts,' and often lack structures or processes needed to support shared power or longer-term commitments to community partnership. As a result, shallow investments in community participation and inclusion — i.e., activities that “check the box” — may lend legitimacy and credibility to projects without making any discernible change to strengthen community leadership and capacity for collective action.

This tool assumes that pursuing 'equity' in community partnerships means increasing the power of communities to address both the immediate needs and systemic injustices that affect them. Teams using the tool should be committed to shifting power dynamics within their partnerships by adopting practices that prioritize the influence of community partners. Many authors have illustrated the range of community influence or power in partnership using the image of a spectrum, like the one shown below (see Appendix A for a more detailed version). On one end of the spectrum, institutional actors 'ignore' community members, and at the other end of the spectrum they 'defer to' community members in project design and implementation.



Partners may find themselves at different ends of this spectrum in different phases of their work. We suggest that the dimensions featured in this tool contribute to moving partners up the spectrum toward more equitable partnerships. The tool assumes that community power in partnerships increases when we ensure that team members have shared understanding, collaborate to make decisions, bring essential perspectives to the table, and develop reciprocal relationships built on mutual respect.

Trust is Fundamental

Partnerships cannot succeed without a commitment to building trust. Though we hope that using these reflections to inform the development of equitable partnering practices will enhance trust among partners, trust cannot be compelled, engineered, or assumed. Trust develops as a result of demonstrating good partnering practices consistently over time. In particular, community members should not be expected to trust institutional partners, given histories of community exploitation by government, academic, and other institutions. This calls for institutional partners to make actionable commitments to earn the trust of community partners.

That said, the current tool is intended to support partners who have a mutual intention to engage with one another. The tool assumes that partners will make commitments to address challenges, concerns, or risks that arise in team reflections. If you or your partners are not currently in a place where you feel that committed engagement will be feasible or productive, then this tool will likely not be helpful.

LIMITATIONS

Institutional policies, organizational structure, or funding requirements can limit how partners are able to work together. For example, a program may receive funding that can only be funneled through government agencies, or can only use implementation approaches selected by grantmaking institutions or government agencies. Academic institutions may have rules around who can be a principal investigator on research projects. Detailed protocols, restrictions on funding, and administrative requirements are among the realities that limit institutions' flexibility to partner with grassroots organizations or community groups in ways that are meaningful and beneficial to communities.

This tool is neither a remedy to institutional barriers nor a substitute for the critical work of challenging the power structures that govern institutions. Rather, this tool prompts discussion about the unique limitations partners may face in their work together and make informed decisions about if and how they intend to navigate these limitations as a team. For those working in governmental, philanthropic, academic, or other institutions, this tool may also help to assess organizational and team readiness for partnering with communities. Community partners may find the reflections here useful when considering whether to engage a new institutional partner; for example, by identifying institutional limitations or building protective measures into the terms of their new partnership. If they decide to collaborate, a shared commitment to transparency between partners is needed in order to use this tool effectively.

HOW TO USE THIS TOOL

Individual & Team Reflections

Within each dimension, each set of questions includes Individual and Team Reflections. For the Individual Reflections, we recommend each team member reflect on their own before sharing with the group. The Team Reflections are intended to prompt open discussion with all gathered members of the project team. However, you may choose to allow time for team members to consider their individual perspective before sharing, just as you would with the Individual Reflections.

We expect that this tool will work best when all team members participating in the reflection are present (in person or virtually) for the discussion. If this is not feasible, you may choose to gather input from absent team members at a different time and share back key takeaways from the discussion. Teams are encouraged to use a group reflection method that dedicates time for each person to share at whatever level of detail or depth they feel comfortable with.

Process for Using Questions

Your team may choose to work sequentially through the reflections in each dimension, or you may pick and choose questions across all the dimensions that seem most relevant to you. To facilitate this, we have grouped the questions within each dimension by topic. You may decide to discuss one topic, several topics, or all topics within each dimension. Different questions may be more appropriate for different stages of your work; for example, project design and planning versus project implementation. Select the questions that you plan to use in each moment accordingly.

The reflection questions in this tool are designed to highlight key topics related to each dimension, but they are not exhaustive. You can adapt the questions, or come up with new questions that pertain to these dimensions, in order to meet the unique needs of your partnership.

A Note on the Reflection Questions

Many of the questions are especially helpful to discuss in the planning phase of your project, but you may want to revisit them during times of transition (e.g., after finishing a grant period).

DIMENSIONS OF EQUITABLE COMMUNITY PARTNERSHIPS

Dimension 1: Shared Understanding

“Understanding what we're doing and how we'll do it”



Partners understand and agree on the purpose and goals of their work together, their shared commitments and values, and the role that each partner will play in accomplishing them. Partners define their shared values, goals, and roles together, ensuring that these agreements are clear to everyone. If changes are made, partners review those changes together. Partners discuss how they will keep each other accountable to upholding their agreements.

Individual Reflections

Use the reflections with an * to inform the discussion of corresponding questions under Team Reflections.

Motivations and Roles

1. What motivates me to commit to this partnership?
2. Is my role clear to me?*
3. Do I feel comfortable with my role as it is outlined?*
 - a. What concerns do I have related to fulfilling this role?

Lessons from the Past

1. What challenges have I experienced in the past related to building shared understanding of team goals, member roles, and the scope of work? What can this group do differently to avoid or overcome these challenges?

Team Reflections

As part of this dimension, consider establishing a process for periodically reviewing and amending your project team's agreements.

Values

1. What values, intentions, or commitments do we want to adopt to guide our work together?

Goals

1. What are the main goals we hope to achieve together, overall or in the current phase?
2. Which of these are the biggest priorities?
3. How flexible are our goals? (e.g., can we revise the scope or revisit certain goals later?)
4. If applicable (for research projects): What questions are we trying to answer together?
5. Are project goals and research questions coming from the community? If not, how will we confirm our project is welcome and wanted by the communities we're working with?

Project Plan

1. What is our plan and timeline for key activities and deliverables?
2. What aspects of the plan can be adjusted? (e.g., flexibility of timeline and activities, type of deliverable, funding considerations such as no cost extensions or renewable funding)

Roles

1. What roles need to be filled during each phase of our project?
2. Is every necessary role currently filled? If not, how will we fill missing roles?
3. What clarifications or changes do we need to make to the roles we have outlined?
**Refer to Individual Reflection 2.*
4. What do team members need to carry out their roles? (e.g., training or technical assistance)
**Refer to Individual Reflection 3.*
5. If one of our team members transitions off the team, what will we do to ensure their roles and responsibilities are fulfilled?

Institutional Context

1. Are there any policies, procedures, or regulations that will influence our work together? (e.g., Institutional Review Board procedures or grant contracts)
 - If so, how will they affect our work?
2. Are there any potential challenges we should be aware of related to these? (e.g., timeline delays or limits on the scope of work)

Accountability

1. How will we keep ourselves accountable to the values, goals, and roles we have agreed on?
2. How will we document our agreements? (e.g., informal ground rules or a formal agreement such as an MOU or charter)
3. What is the process for revising our agreements, as needed?
4. How will we practice accountability to the communities we are working with? Specifically, how do we plan to uphold community agency over research and project goals?

See Appendix A for additional questions to consider on topics including Communication, Funding, Deliverables, Data or Information Management, and Evaluation.

Dimension 2: Collaborative Decision-Making

“Determining how we’ll collaborate to make important decisions”



Partners share influence over their work from the beginning to the end of their project. This may mean making every decision together or deciding that certain partners have more say over certain parts of the work. Partners also seek opportunities to increase community partners' influence over key decisions; for example, by developing a consensus-based decision-making process, or by establishing that community partners have the final say over key decisions.

Individual Reflections

*Use the reflections with an * to inform the discussion of corresponding questions under Team Reflections.*

Participation in Decision-Making

1. What decisions are important for my partners and me to make together?*
2. What decisions (if any) do I think can be made without my input?*
3. What (if anything) would make me reluctant to openly share my views or ideas with the group?
 - a. What (if anything) could the team do to make it easier for me to share openly?*
4. [For teams already engaged in decision-making processes] Is there anything I would like to change about how our team makes decisions? If so, how could we do things differently?

Lessons from the Past

1. What challenges have I experienced in the past related to decision-making? What can this group do differently to avoid or overcome these challenges?

Team Reflections

Periodically check-in to discuss: How does the team feel about how we’ve been making decisions? What’s been going well? What updates could we make?

Establishing Decision-Making Processes

**For questions 2, 3, and 4, refer to your responses to Individual Reflection questions 1 and 2.*

1. How does our team want to make decisions? What kind of guidelines or processes would we like to use to support our decision-making? (e.g., consensus-based, 'majority rules')
 - Will there be an individual or group who gives final approval of the decisions we make or the work our team produces?
2. What are the most important decisions we should make together as a team? (e.g., resource distribution, determining goals of the project, identifying partner roles)
 - Oftentimes, one partner initiates a project focused on a specific topic and then invites others to take part. In such cases, what opportunity may invited partners have to give input on the project scope and direction?

Establishing Decision-Making Processes, continued

1. Who will be present for these important decisions? (e.g., all partners or at least one team representative)
2. Which decisions (if any) can be made with limited input from the full team? Who will take the lead on each of those?
3. How will the rest of the team be informed of decisions made in their absence?
4. When will decisions be made? (e.g., during weekly meetings, designated meeting each month, quarterly planning)

Institutional Context

1. What decision-making rules or practices in the organizations represented here might affect how our team makes decisions? (e.g., internal review or approval processes)
2. What institutional barriers may limit our ability to implement a decision-making process where community partners have equal or more influence over decisions? How will we navigate these in our work together?

Promoting Equal Voice

**For questions 9 and 10, refer to your responses to Individual Reflection question 3a.*

1. How can our team address barriers to ensuring all team members can actively participate in making decisions?
2. What processes or practices can we adopt to make it easier for everyone to share their views or ideas? (e.g., anonymous voting)

Dimension 3: Meaningful Representation

“Inviting in the perspectives we need”



Partners bring together team members who offer the most critical perspectives for their work, giving priority to viewpoints and experiences from communities or groups their shared project intends to benefit. Partners reflect on how their personal and professional experiences inform the perspectives they bring to the table. The team creates a plan to gather input from and share information with other community members and relevant groups as needed.

Individual Reflections

Use the reflections with an * to inform the discussion of corresponding questions under Team Reflections.

Personal Perspectives and Experiences

1. What hats do I wear in this partnership? (i.e., what communities or organizations do I belong to, and what roles do I play?)
2. Considering the hats I wear, how do I engage in this partnership when I am representing my organization or community versus when I am participating as an individual?
3. How have my personal and professional experiences shaped how I think about or approach the project we're working on together?
 - a. Who do I feel I can speak for? Who do I feel I cannot speak for?* (i.e., do I feel I have the background and experience to represent perspectives of residents in my neighborhood, a specific group of residents, my entire organization, my immediate work team, etc?)

Lessons from the Past

1. It can be difficult to make sure the 'right' voices are at the table. What past challenges have I seen or experienced as it relates to ensuring meaningful representation? What can this group do differently to avoid or overcome these challenges?

Team Reflections

Periodically check-in to discuss: How will we continue the conversation around community representation? When and how often should we revisit any concerns that come up?

Defining Community

1. What communities or groups do we hope benefit most from this project?
2. Who makes up these communities or groups? (e.g., residents of the same neighborhood, people with shared background or experiences, people with shared racial or social identity)
 - How are these communities or groups currently represented on our team?
3. What other perspectives do we need in order to understand and take action on the issue we want to address?

Representation

1. Do we expect team members to represent specific groups like communities, organizations, or interest groups?
 - If so, does everyone feel comfortable speaking on behalf of the group they are expected to represent?
 - *Refer to *Individual Reflection 3a*.
2. Do members of groups or communities have opportunities to give input on who represents their interests on the project team? If so, how? (e.g., through nominating individuals and voting)
3. If applicable, how will team members gather opinions/input from and share information with the groups they represent? (e.g., other community members, interest groups, or members of organizations)

Inviting People to the Table

1. What is our process for ensuring we have the perspectives needed on our project team?
2. If any important perspectives are missing, how will we invite them to the table?
 - In particular, are there any specific community groups who have been historically or currently excluded that we need to consider?
3. Are there any institutional limitations or barriers that may make it difficult to include individuals who can bring these perspectives? If so, how can we address them?

Gathering Additional Input and Feedback

1. How can we gather input from people who are not on the project team? (e.g., other community members, interest groups, or members of organizations)

Dimension 4: Reciprocal Partnership

“Recognizing what we give, what we receive, and what we create together”



Partners exchange expertise, experience, resources, and power to achieve their shared goals. Partners determine how they will support one another to ensure everyone benefits from their participation in the partnership. Partners also collaborate to address barriers preventing individuals from participating the way that they would like to.

Individual Reflections

Use the reflections with an * to inform the discussion of corresponding questions under Team Reflections.

Contributions

1. Currently, how much time can I give to this project?* (e.g., hours per week or month)
 - Note: this may change as the project progresses.
2. What resources, knowledge, and/or skills am I able to contribute to this project?*

 - a. *Resources:* sources of funding, physical meeting space, office supplies, food for meetings
 - b. *Knowledge or experiences:* knowledge of how an issue affects people’s lives and challenges or opportunities experienced in addressing it, knowledge of community strengths, knowledge of approaches that have worked well elsewhere
 - c. *Skills:* Relationship-building, research, project planning/management, creative/artistic, training and technical assistance, marketing/communication, language/translation

3. What kind of power do I bring to the table, and how can I use it for the good of the project?* (e.g., community leadership, reputation of expertise in the field, community buy-in, information)
4. What do I need from others on this team to be able to participate/contribute in the way that I want to?* (e.g., compensation, meeting at certain times of day, meeting in accessible places, childcare, meals, transportation stipends)

Risks

1. What risks (if any) do I face by taking part in this project?* (i.e., could participating affect my relationships or reputation in my community or organization? Do I risk losing trust?)
2. What fears do I have in entering this partnership?*

Benefits

1. What do I hope to gain from this project?*
2. What benefits do I expect to receive for participating?* (e.g., salary increase or bonus, stipend, recognition, a publication, new skills, a learning opportunity, a chance to make impact on an issue care about)
3. What do I hope that my community or organization gains as a result of this project?*

Lessons from the Past

1. Have I experienced a partnership in which I or others felt overburdened, or questioned whether my participation was worthwhile? If so, what can this group do differently to avoid or overcome this?

Team Reflections

Periodically check-in to discuss: How will we continue the conversation around reciprocal partnership?
When and how often should we revisit any concerns that come up?

Reviewing Our Needs

1. What additional knowledge, experiences, resources, skills, and time commitment do we need to make this project successful?
 - **Refer to Individual Reflection questions 1, 2, and 3.*

Addressing Barriers and Burnout

1. How can we remove or address barriers that prevent people from participating in this project in the ways that they want to? (e.g., institutional barriers or limitations)
 - **Refer to Individual Reflection question 4.*
2. What can the team do to support each partner to participate for as long as they want to? (especially partners who are not participating as part of their professional roles)
3. What will we do as a team to ensure that no one becomes overburdened or burnt out?

Reducing Risk

1. What can we do to reduce any fears or risks folks may be taking on by participating?
 - **Refer to Individual Reflection questions 5 and 6.*

Ensuring Mutual Benefit

1. What practices or processes can we use to ensure that everyone is getting what they need and expect out of their participation in this project?
 - **Refer to Individual Reflection questions 7, 8, and 9*
2. If the project/initiative receives funding, how will funds be distributed among partners?
 - How will we make sure resource distribution is equitable?
3. What can we do to strengthen the positive impacts of this project on participating partners and reduce any negative impacts?
 - **Refer to Individual Reflection questions 7, 8, and 9*

Dimension 5: Respectful Relationships

“Respecting each other and our unique expertise”



Partners build relationships based on mutual care, shared purpose, and respect for the unique contributions they each bring to the table. Partners recognize the value of all types of knowledge and experiences, and integrate community history, language, and traditions into their work together. This applies to relationships among members of the project team as well as the team’s relationship with the broader communities their work intends to benefit.

Individual Reflections

Use the reflections with an * to inform the discussion of corresponding questions under Team Reflections.

Honoring Identities

1. How do I prefer to be addressed? (e.g., preferred name, pronouns, titles)

Lessons from the Past

1. In past experiences, what has made me feel valued as a member of a team?* (e.g., practices, traditions, activities, or group norms)
2. Is there anything I've seen in my partnership experience that has made me or others feel disrespected? What should this team do differently?*
3. What else would make me feel valued or recognized for my work on this project?*

Team Reflections

Periodically check-in to discuss: How will we continue the conversation around building respectful relationships? When and how often should we revisit any concerns that come up? How will we hold ourselves accountable to upholding mutual respect for one another and the communities we work with?

Community Building and Relationships

1. What can we do to ensure everyone feels valued and recognized for their work?
 - *Refer to Individual Reflection questions 2, 3, and 4.
2. What are we interested in learning from one another on this team? How can we create opportunities for this?
3. Are there specific ways we would like to spend time together as a team outside our regular business meetings? (e.g., community meals, celebrating our wins as a team/individuals, team-building activities)
4. What can our project team do to foster relationships with communities outside of project meetings? (e.g., attending community events or ceremonies or building alliances with community groups)

Cultural Relevance

1. Are there any aspects of the project goals or project plan that do not make sense in the cultural context we are working in? If so, how should the goals or plan be revised?
2. Are there any particular practices, traditions, customs, or norms we'd like to incorporate into meetings or project activities?
3. What are some culturally appropriate and accessible ways of communicating with communities about this project? (e.g., invitations, sharing project plans, data, or results)

Community History

1. What should we know about communities' historical experiences with relevant institutions? (e.g., universities, health care institutions, government, non-profit organizations)
2. What is our team's history with the communities we're working with? (e.g., past projects and outcomes, type of relationships, length and quality of engagements)
3. How do these histories and experiences influence our approach to working with these communities? (e.g., opportunities for recognition and repair, actions, and strategies)
4. How can this team continue to strengthen our ability to work well with our communities (e.g., cultural competency training)?

Community Strengths

1. How can we emphasize, mobilize, and integrate community strengths into the project design and implementation processes? (ie, adopt a strengths-based as opposed to deficit-centered approach)

Contextual Limitations

2. Are there any institutional or logistical limitations that:
 - make it difficult to build relationships in the broader community?
 - make it difficult to integrate community knowledge, culture, or practices into our project design?If so, how will we address these?

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APPENDIX A: ADDITIONAL TEAM REFLECTION QUESTIONS

Below are additional questions to consider as part of Dimension 1: Shared Understanding.

Communication

1. How will we communicate throughout the project? (e.g., in-person or virtually? Will we call or text? How often will we talk, and at what times?)
2. How will we share feedback about challenges and concerns that arise?
3. How and when will we communicate with communities at large throughout the project? (e.g., type of communication, critical points during the project, sharing data and results)
4. How will we address situations in which we fall short of upholding our agreements? What is our process for conflict resolution?

Funding

1. Who will manage the administration of finances for this project, and how will the disbursement of funds work?
 - How can we ensure that these processes are as streamlined as possible, so that people have the resources they need when they need them?
2. What is the timeline for spending project funding and reporting back to funders? How can we make this process as smooth as possible and ensure that we are meeting all requirements?
3. How will we pursue new funding opportunities in the future?
 - What kinds of opportunities are we interested in pursuing (e.g., government or private grants, donations, crowd-funding, fundraising through sales)?
 - Who will be involved in this process?
4. Is there any circumstance in which we would be willing and able to continue collaborating together without external funding support?

Deliverables

1. What deliverables are we producing for this project, and who's the intended audience? (e.g., communications materials, publications, reports, tools, resources)
2. How will we handle authorship, branding, or other ways of denoting credit for the work we produce together?

Data or Information Management

1. Who will own the information or data collected by this project? How will they keep it safe, and who will have access to it?
2. How can we ensure that everyone who should have access has it, without compromising confidentiality/privacy?

Evaluation

1. What does success look like for this project?
2. When can we expect to begin seeing results?
3. How will we assess whether we are achieving our shared goals? How often will we assess?
 - What will we do if it seems that we are not achieving these goals?

APPENDIX B: SAMPLE SPECTRUM OF ENGAGEMENT

Community Engagement Spectrum



	Ignore	Inform	Consult	Involve	Collaborate	Defer
Org Actions	Exclude community from knowledge of and involvement in decision making	Provide community with relevant information about the decisions being made	Gather feedback from community about the decisions and solutions suggested by the org	Include community in identifying key issues, integrate community into the decision-making process	Partner with the community to play a leadership role in the identification of solutions and implementation of decisions	Place final decision-making power in the hands of community members
Community Actions	--	Receive information	Inform Stage + Give input on solutions	Consult Stage + Identify issues to be addressed and decisions to be made	Involve Stage + Guide implementation of decisions	Collaborate Stage + Form partnerships to address community priorities
Knowledge Prioritized	Org employees, external research	Org employees, external research	Org employees, public opinion	Org employees, community member interests and ideas	Org employees, lived experience and expertise/wisdom of community members	Lived experience and expertise/wisdom of community members
Message	Your perspective does not matter	We will keep you informed	We care what you think	We will work with you to understand and address your concerns	We will look to your expertise to help guide the solutions we formulate	We will give you resources to exercise autonomy in implementing your decisions
Risk or Challenge	RISK: Marginalization of community members/specific groups	RISK: Placation without the ability to influence	RISK: Tokenization of ideas without action	CHALLENGE: Consensus on priorities	CHALLENGE: Buy-in and availability from community members	CHALLENGE: Costly and time intensive, need for significant community organization
Benefit	Time + cost efficiency	Community can prepare or make personal decisions based on information given	Know what community members think of given topic	Prioritize community-based interests	Implementation of solutions aligned with interests	Community members are equipped with resources to facilitate change
Activities	--	Fact sheets, websites, newsletters, publicly available data	Public opinion, focus groups, surveys, town halls	Workshops/planning, focus groups, surveys, town halls	Advisory committees, participatory decision-making, consensus building, open planning forums, community organizing	Community-driven planning, research, voting, delegation, cooperatives + coalitions
Resource Allocation	100% Org	70-90% Org, 10-30% Promotion	60-80% Org, 20-40% Community Consultation Activities	50-60% Org, 40-50% Community Involvement	20-50% Org, 50-60% Community Partners/Leadership	20% Org, 80% Community Leadership

Adapted from: [The Spectrum of Community Engagement to Ownership](#) (Gonzalez, 2019) and [IAP2 Spectrum of Public Participation](#) (IAP2 International Federation, 2018).