# Leading with Equity:
A Guide for Data to Action through Participatory Engagement

1. Increase understanding about **the purpose and framework for participatory data to action processes**

2. Provide a model for **starting and sustaining data to action (D2A) relationships** with residents who have not traditionally been included or present in civic processes

3. Spark discussion about how to meaningfully engage and collaborate with residents in **future publicly- and privately-led community change projects**

Data to Action Participatory Engagement Elements
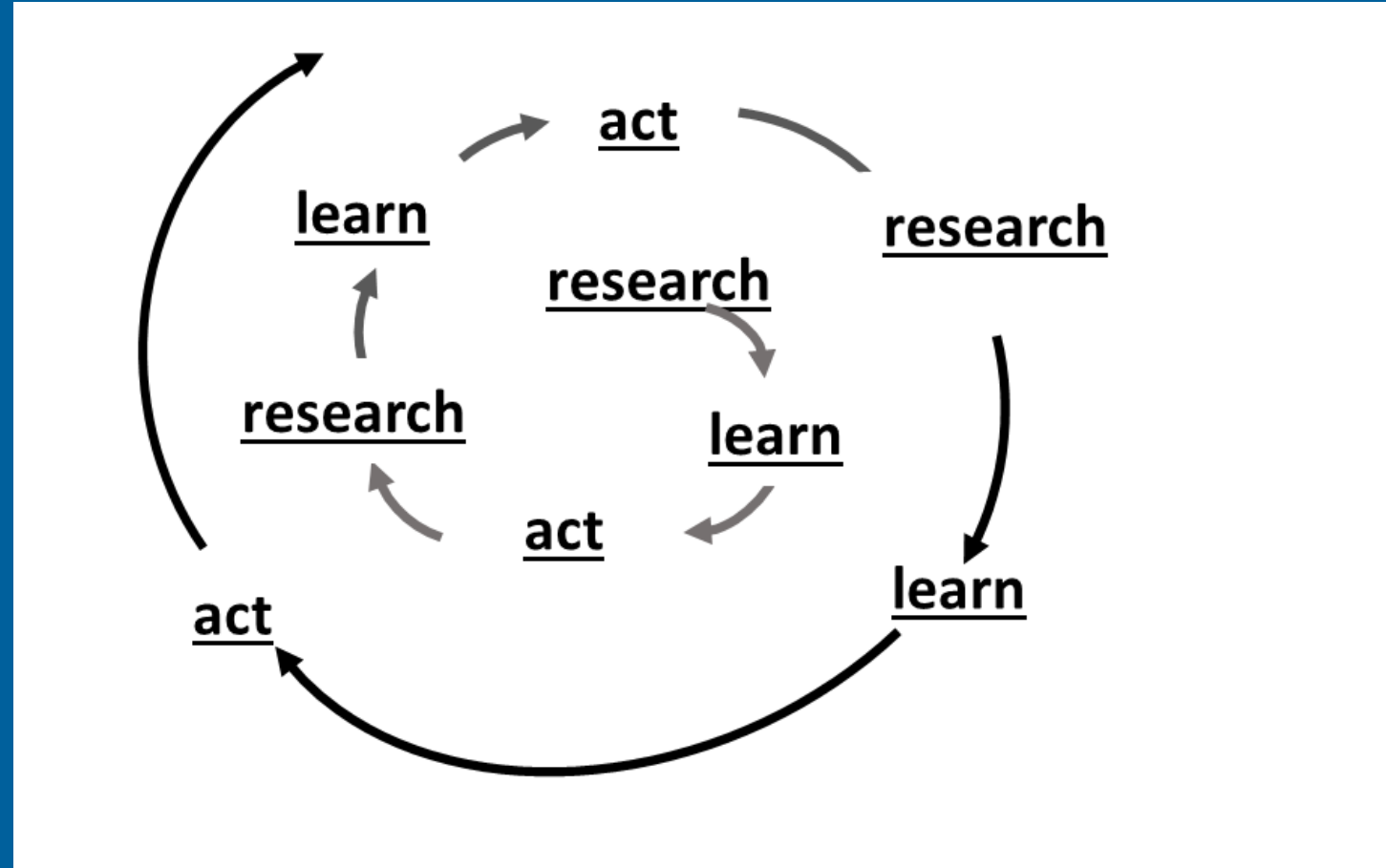
How is Data to Action (D2A) Participatory Engagement different than traditional engagement?

Traditional Engagement	D2A Participatory Engagement
Municipalities engage residents through public meetings, forums, and surveys	Residents engage neighbors and other community members in mutually convenient ways
Community members volunteer their time to provide feedback	Community members are compensated for their time
Municipal and academic expertise is prioritized	Community expertise and experience is prioritized and supported by technical expertise from municipal staff
Tends to emphasize planning	Tends to emphasize practice and action
Tends to be more linear	Tends to be more iterative

WHY USE PARTICIPATORY D2A ENGAGEMENT?

- **Builds resident leadership & civic engagement** with members of the community who may have experienced barriers to participating in traditional municipal processes

- Creates a platform for municipal staff & community members to **learn from and teach one another** new ideas and skills

- **Builds connections between residents** to create more social cohesion in the community

- **Includes community members from the outset of project planning –** moves beyond consulting community members after an action has been decided

- Implements actions & solutions that **the community defined for themselves and support**

Data to Action through Participatory Engagement honors certain values:

Power-Sharing

Mutual Respect for Experience/Expertise

Informed Decision-Making

Maximum Involvement

Relationship Building

Power-Sharing

- Technical leads distribute decision-making authority among the group as a whole

- Community participants equally shape the data gathering process:
  - For example, they decide how information will be collected and interpreted
  - They are also included in determination of follow-up implementation projects

- Just as technical staff are paid for their time, Community participants should be offered compensation
  - Demonstrates that all types of expertise are valued
  - May permit individuals to participate who might not be able to otherwise

MetroWest Climate Equity Project Example

Survey
Interview
Group Conversation
Game or Event Activity

- Which of these tools would you be most comfortable using?

- Where and how would you reach people with this tool?

- What other tools should we maybe use?

Source: Danley, K. S., & Ellison, M. L. (1999). *A handbook for participatory action researchers*.

Mutual Respect for Experience/Expertise

- Community participants and technical lead/staff each have **unique and equally important contributions**

- Partnership should present an **opportunity and space for co-learning**

- Technical lead and staff should foster an atmosphere of respect that **emphasizes the dignity and importance of each team member**

- Planners should make a concerted and conscious effort to **not use professional jargon and acronyms**
  - *Example: <u>Public Health Communication Collaborative Plain Language for Public Health</u>*

Informed Decision-Making

Different Types of Data

- Given participants' different backgrounds and areas of expertise, incorporate training as an ongoing function within the research project

- Allows for collaboration and informed decision-making among the entire group

"Qualitative" Data

This type of data includes:
- Words
- Stories and experiences
- Feelings and perceptions

For example:
- How cold you feel
- Whether Everett feels busier now
- How you feel about rising housing costs

It looks like: quotes, pictures, notes

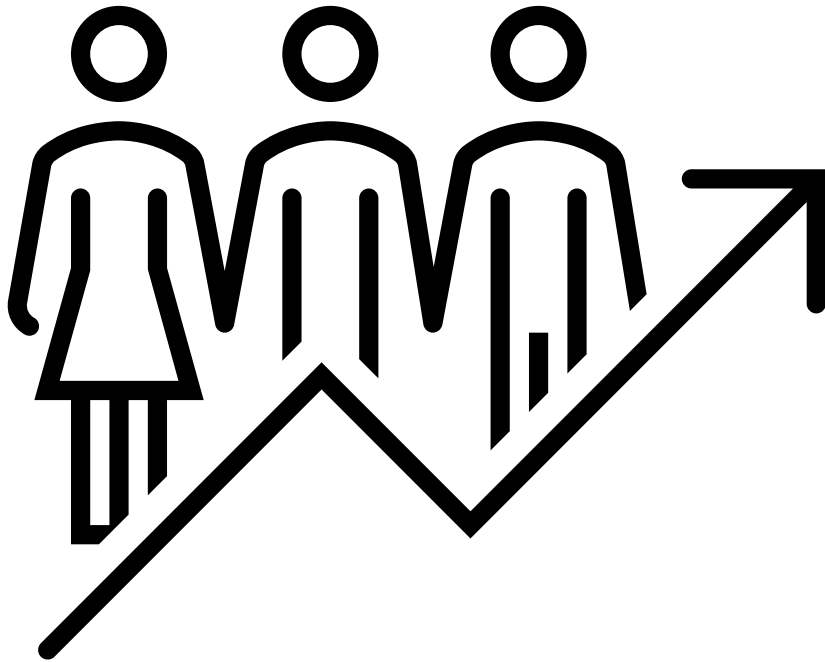## "Quantitative" Data

This type of data includes:
- Numbers
- Things you can count
- Rates, tallies, etc.

For example:
- The temperature outside
- The population of Everett
- The rate of increase in housing costs

It looks like: graphs, charts, etc.

Maximum Involvement

- Minimize, and where possible eliminate, aspects of the work that are not open to the involvement to all participants

- Creates space to explore how more involvement offers greater opportunity as well as shared responsibility across participant group

- More involvement supports conditions for feelings of ownership and better positions participants to contribute with shared decision-making.

Source: Danley, K. S., & Ellison, M. L. (1999). *A handbook for participatory action researchers.*

Relationship Building

- Emphasizes non-transactional relationships

- Focus is beyond time-limited engagement and technical staff seek to continue relationships after the project "ends"

- Can mean investing more of ourselves into the work and personalizing the work, which can feel taxing at times

- The trust that comes with relationships allows us to probe more deeply and to make changes that improve services and programs
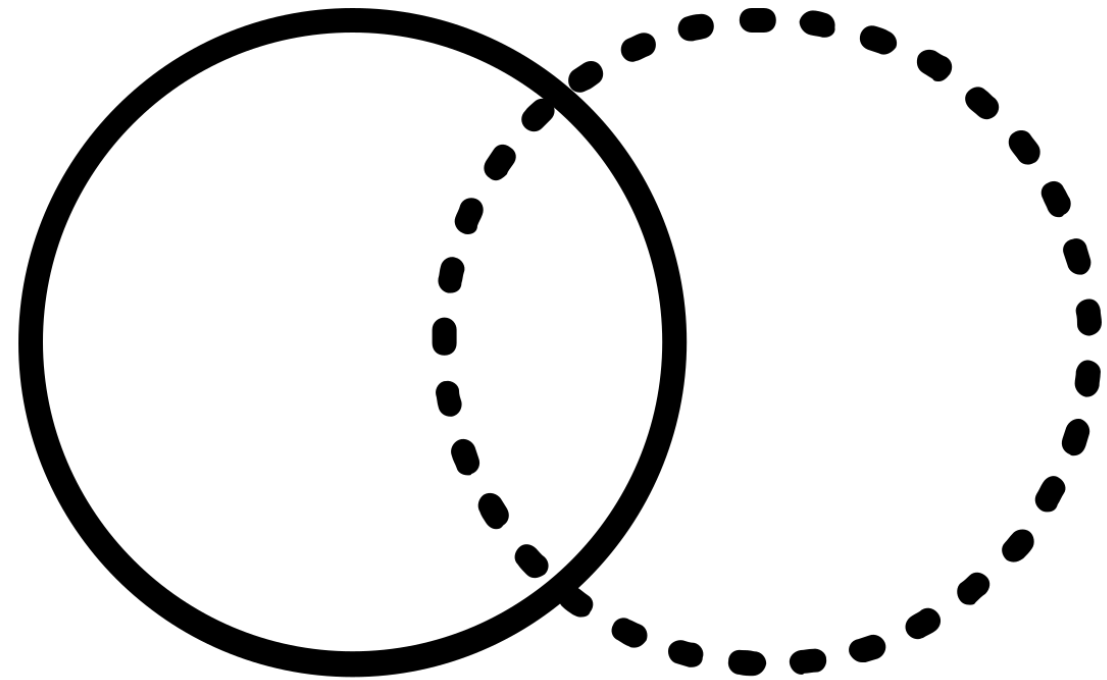
Participatory Data to Action (D2A) Engagement Model

Working with Community Participants is an Iterative Process

Communication & Iteration Are Central

- Preparing the Team
- Recruitment
- Talk to Interested Community Members
- Obtain Commitment
- Collaborate
- Train Each Other
- Co-Develop Project Activities
- Co-Execute Project Activities
- Co-Interpret Project Results
- Act
- Celebrate
- Evaluate

STEP 0: PREPARING THE TEAM

- Identify and affirm values underlying the project
  - *See Participatory Engagement Values*

- Determine project management roles and responsibilities
  - Define the role of community participants within the project team

- Develop draft project materials
  - Materials likely needed, include data to action community participant role description, forms for participant compensation, introductory project language for community organization outreach, and project webpage

STEP 1: RECRUITMENT

- Speak with community leaders and/or community-based organizations (CBOs) who know or work with the priority community/community of focus about the project and D2A community participant role. Use these conversations to:
  - Get feedback/co-develop on the project scope of work and role description of the participant
  - Promote the participant opportunity
  - Foster relationships with contacts and CBOs doing related work.

- Develop and distribute a 1–2-page flyer in the appropriate languages that includes:
  - Project description
  - Data to Action Community Participant role in project
  - Benefits of participation for project and participant
  - General requirements for Data to Action Community Participant role(s)
  - Expectations for activities and time commitments
  - Timeline
  - Compensation amount

Tip: Doing individualized outreach is more successful than general promotion. Collaborate with contacts and CBOs to identify people who may be interested.

Source: Danley, K. S., & Ellison, M. L. (1999). *A handbook for participatory action researchers.*

Example: MetroWest Climate Equity Recruitment Outreach
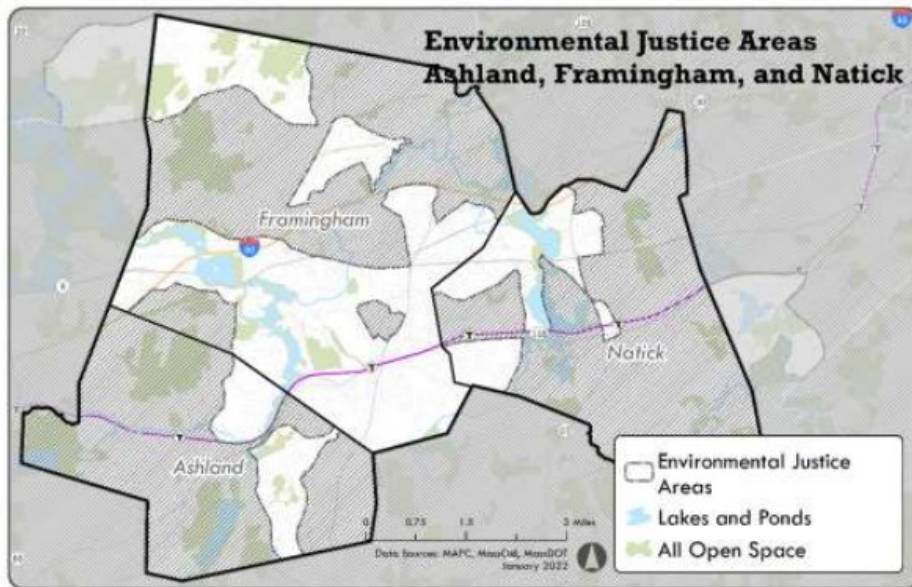
Project Introduction
The towns of Ashland and Natick and the City of Framingham have partnered on a project focused on the intersection of climate change and equity. The *Metro West Climate Equity* project aims to reduce the social, environmental, and economic vulnerabilities that affect Environmental Justice communities across the three municipalities and to build local resilience to climate change.

Community Liaisons
Community Liaisons will work individually and together with the *Metro West Climate Equity* project team to collect information in their communities to explore perceptions of climate change and identify actions that would increase equity and resiliency in the Environmental Justice (EJ) neighborhoods of Ashland, Framingham, and Natick.

Eligibility:
Community Liaisons should live, work, or volunteer in Ashland, Framingham, and Natick, be at least 16 years old, comfortable working in English, and able to participate for the full length of the project. Preference given to participants who are comfortable speaking a language other than English and for residents from the EJ neighborhoods (*see map*).

**Environmental Justice Areas
Ashland, Framingham, and Natick**

Framingham

Natick

Ashland

Legend:
- Environmental Justice Areas
- Lakes and Ponds
- All Open Space

Data Sources: MAPC, MassGIS, MassDOT January 2022

Activities:
The research portion of this project will run from **February 2022 – July 2022**. We will ask that Community Liaison are able to commit to ~30 hours during this 6-month window.

- ~ 2 hours of training on climate change, risks, and vulnerabilities.
- ~ 3 hours to participate in a research methods and questions development workshop
- ~ 18 hours of data collection
- ~ 2 hours of data analysis
- ~ 3 hours to work with project team to plan and do outreach for the Community Climate Conversations
- ~2 hours to attend one Community Climate Conversation

Financial Compensation:
Community Liaisons will receive a $500-$1,000 stipend in recognition of their significant contribution to this project. Stipends will be issued by MAPC upon submission of documentation.

Skills important to the project to be advanced through trainings and workshops include:

- Speaking to local climate risks and vulnerabilities
- Developing research methods and questions
- Identifying data sources within the community
- Interviewing and surveying
- Qualitative and quantitative data analysis

Project timeline:

Febuary	March	April	May	June	July
Onboarding	Orientation 2 Training Sessions	Data Collection	Data analysis workshop(s)	Promote Community Climate Conversations	Attend Community Climate Conversation

You can be a Community Liaison!

As someone living or working in Ashland, Natick, or Framingham, you know a lot about the community; That knowledge is critical to the *Metro West Climate Equity* project.

Connect with us at MWClimateEquity@mapc.org or 617-933-0788 and let us know you are interested in being a Community Liaison. In your message, please share your:

- Name;
- Age range;
- Town/City and neighborhood in which you live, work, or volunteer; and,
- Any other language skills you have beyond English.

Recruiting for Community Participants: What are you looking for?

In general, D2A Community Participants:

1. Are a member of the community of interest

2. Have interest in the topic area and time to investigate it

3. Are well-connected with community members

1. Reside in neighborhoods or reflect demographics of priority population

2. Share an interest or open to learning more about the specific focus of data work

3. Have networks through ESOL program, senior center, social groups, etc.

Example: Healthy Neighborhoods Study

Priority Locations

"The **Healthy Neighborhoods Study** focuses on nine communities divided into three areas: one north of Boston, one in Greater Boston, and a third south of Boston… The communities were chosen because, although they all face varying levels of economic and health disparities, each shows promise of a wave of new development in the near future.

North of Boston: Chelsea*, Everett, Lynn
Boston: Roxbury*, Dorchester, Mattapan
South of Boston: Brockton*, Fall River, New Bedford

Each member of this research network brings their own unique experience, expertise, and voice to identify, measure, and address the development challenges facing their communities."

North of Boston:
Chelsea*
Everett
Lynn

Boston:
Dorchester
Mattapan
Roxbury*

South of Boston:
Brockton*
Fall River
New Bedford

9 Communities:
3 regional clusters
3 targets*, 6 controls

Source: Healthy Neighborhoods Study, https://www.clf.org/healthy-neighborhoods-study/
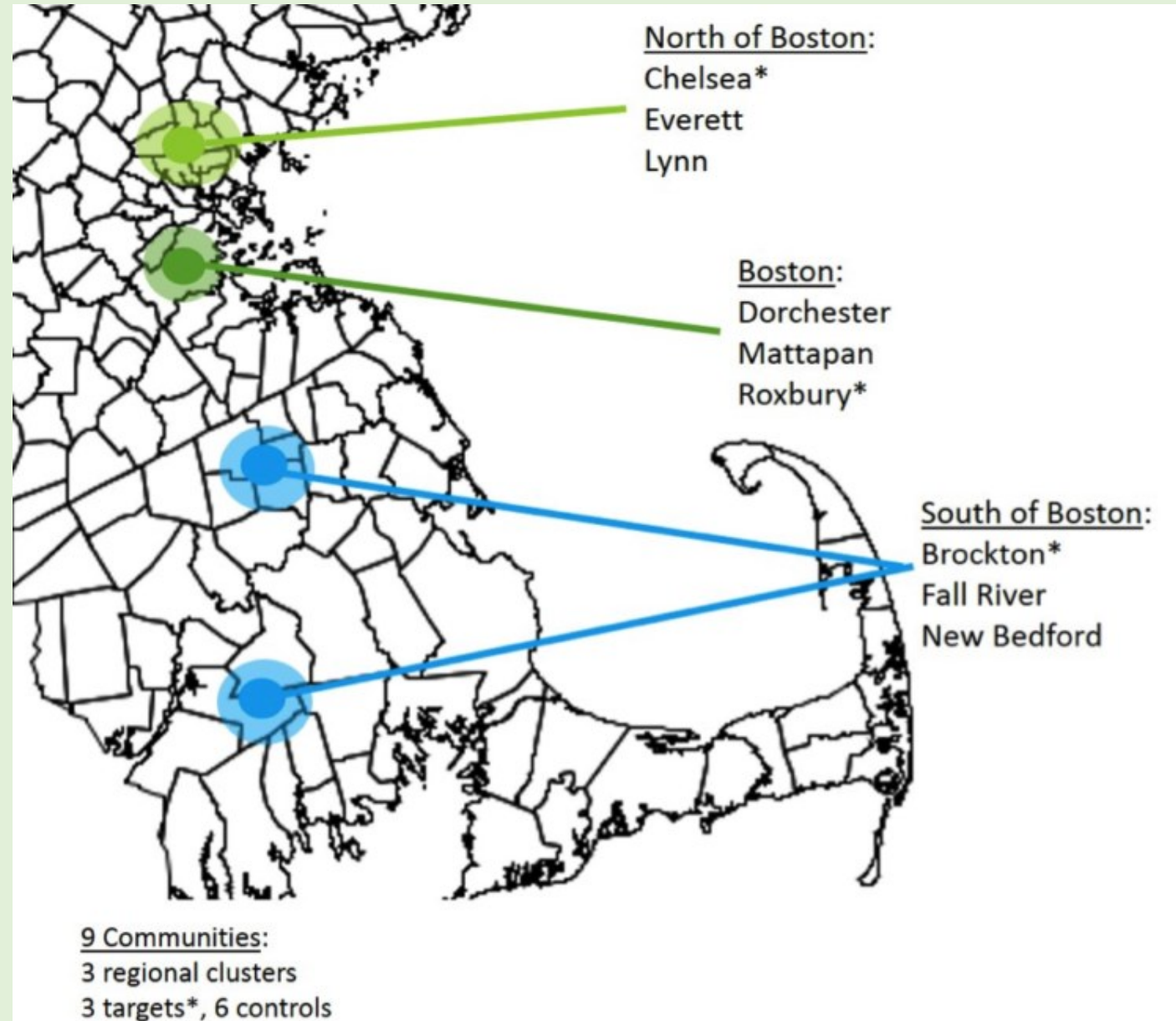
STEP 2: TALK TO INTERESTED COMMUNITY PARTICIPANTS

- Schedule time to talk to interested community members about the project and the D2A participant role and responsibilities
  - Can be via 1-1 or small group meetings with interested community members

- Set clear expectations about the role to allow individuals to make informed decisions about their participation
  - Assists community member to consider the physical, intellectual, and emotional implications of becoming a team member

Tip: Show an example of an activity D2A participants may do as part of the project to help them decide if they're interested

Source: Danley, K. S., & Ellison, M. L. (1999). *A handbook for participatory action researchers.*

STEP 3: OBTAIN COMITTMENT

MetroWest Climate Equity Project Example

- Meet or talk 1-1 with the potential D2A participant to address any concerns or questions
  - Share an agreement to participate in the role following the conversation

- Confirm the individual's desire and willingness to fulfill the role and responsibilities of becoming a D2A Community Participant

- Execute an agreement between the project organizations and D2A participant

Tip: Consider recruiting more participants than needed. There will likely be attrition.

Re: MetroWest Climate Equity Project

Thank you for your participation in the MetroWest Climate Equity Project and for your voluntary participation for the term of March 1, 2022 – July 30, 2022.

Honorarium: In recognition of the time and service you are providing, MAPC agrees to pay you an $ honorarium for your participation as a Community Liaison for the MetroWest Climate Equity Project. In order for you to receive payment, you must send MAPC a signed copy of this form with a completed W-9 form. Electronic signature is acceptable. You are responsible to comply with any and all state and/or federal tax liabilities related to this payment. One payment of $ will be made at the completion of the Community Liaison Training and a final payment of $ will be made at the completion of the honorarium term.

Participant's Signature: _____ Date: _____

Please include your name and address to where you would like to have the check mailed below:

Participant's Name: _____

Participant's Address: _____ Street Address

_____ Apt, Suite, Etc.

_____ City, State

_____ Zip Code

Please email this completed form and a completed W-9 form to _____ .

Please keep one copy of this form for your records.

Source: Danley, K. S., & Ellison, M. L. (1999). *A handbook for participatory action researchers*.

STEP 4: COLLABORATE

- Start meeting with the D2A Community Participants to discuss project work

- Plan meeting around the participants schedules
  - Evenings or weekends may work best and consider locations preferred by participants and that may be more accessible to those without cars

- Co-create ground rules to return to in moments that spark discomfort
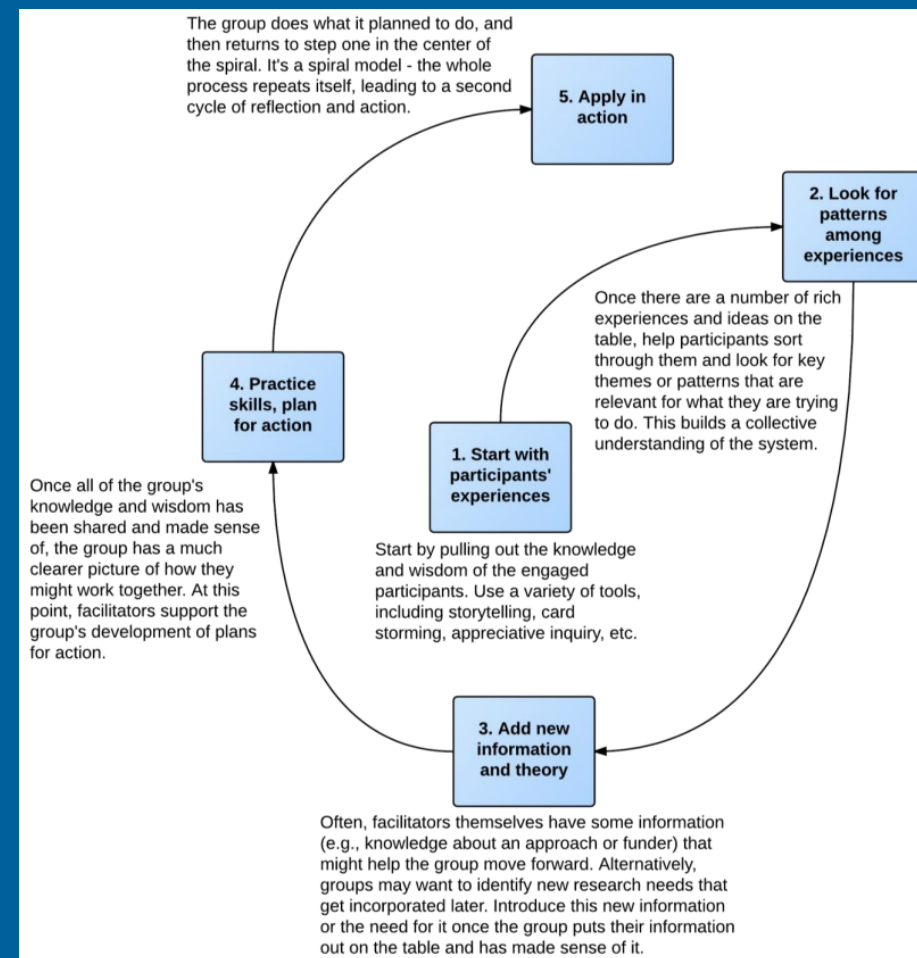
Group Agreements Example

Group Agreements

1. Be Fully Present
2. Everyone is here to learn
3. Listen for understanding
4. Take space, make space
5. Speak from your experience; use "I" statements
6. One Mic
7. Accept and expect lack of closure
8. Share the lesson no the story

STEP 5: TRAIN EACH OTHER

- Use a Popular Education model to foster co-learning: everyone has something to teach and to learn!
  - Leave space in agendas and material development to allow the group to make decisions about what topic to explore in-depth

- Train each other about the topic you are investigating
  - Technical leads and staff: Can share maps, data, and research about the topic
  - D2A Community Participants: Can share lived experiences, stories from neighbors, and their day-to-day observations on the topic

- Use interactive activities to enhance engagement

The group does what it planned to do, and then returns to step one in the center of the spiral. It's a spiral model - the whole process repeats itself, leading to a second cycle of reflection and action.

5. Apply in action

2. Look for patterns among experiences

Once there are a number of rich experiences and ideas on the table, help participants sort through them and look for key themes or patterns that are relevant for what they are trying to do. This builds a collective understanding of the system.

4. Practice skills, plan for action

1. Start with participants' experiences

Once all of the group's knowledge and wisdom has been shared and made sense of, the group has a much clearer picture of how they might work together. At this point, facilitators support the group's development of plans for action.

Start by pulling out the knowledge and wisdom of the engaged participants. Use a variety of tools, including storytelling, card storming, appreciative inquiry, etc.

3. Add new information and theory

Often, facilitators themselves have some information (e.g., knowledge about an approach or funder) that might help the group move forward. Alternatively, groups may want to identify new research needs that get incorporated later. Introduce this new information or the need for it once the group puts their information out on the table and has made sense of it.

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STEP 6: CO-DEVELOP PROJECT ACTIVITIES

- At every phase in a project, planners should introduce:
  - Intent for the proposed activity
  - Alternatives for implementing the activity
  - Implications and relevance for the priority community

- The group can decide how to proceed
  - Seek consensus but have a fallback decision-making method (e.g., group majority decision)

MetroWest Climate Equity Project Example

| Survey |
| Interview |
| Group Conversation |
| Game or Event Activity |

- Which of these tools would you be most comfortable using?

- Where and how would you reach people with this tool?

- What other tools should we maybe use?

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Example: Research for Organizing

Popular Education Approaches in Training

Materials Needed:

Butcher Paper
Markers
Pen
Paper
Interview Guide
Recording device and extra batteries

Interview Role Play

Build familiarity with interviewing by practicing it with peers and test out questions so revisions can be if needed to better connect with priority population

Pair up participants and instruct them to interview each other. Give each person 10-15 minutes to interview each other, then switch.

Encourage participants to write down any questions that come up during the interview process.

Bring the group back together and ask about issues that came up during the role play. Are there any questions that were troublesome? Do any questions need to be changed? Are there any other issues that came up?

Record responses on butcher paper and revisit interview questions.

STEP 7: CO-EXECUTE PROJECT ACTIVITIES

- Ask the D2A Community Participants what kind of support they would appreciate when executing the agreed upon activities

- Examples of support include:
  - Co-facilitating interviews or focus groups
  - Providing governmental press release or local press on effort to affirm legitimacy of activities
  - Scheduling space or requesting materials on behalf of D2A Community Participants
  - Developing flyers, postcards, or promotional materials
  - Co-developing talking points that the D2A Community Participants can use

MetroWest Climate Equity Project Example:
Community Postcard (Spanish Language Version)
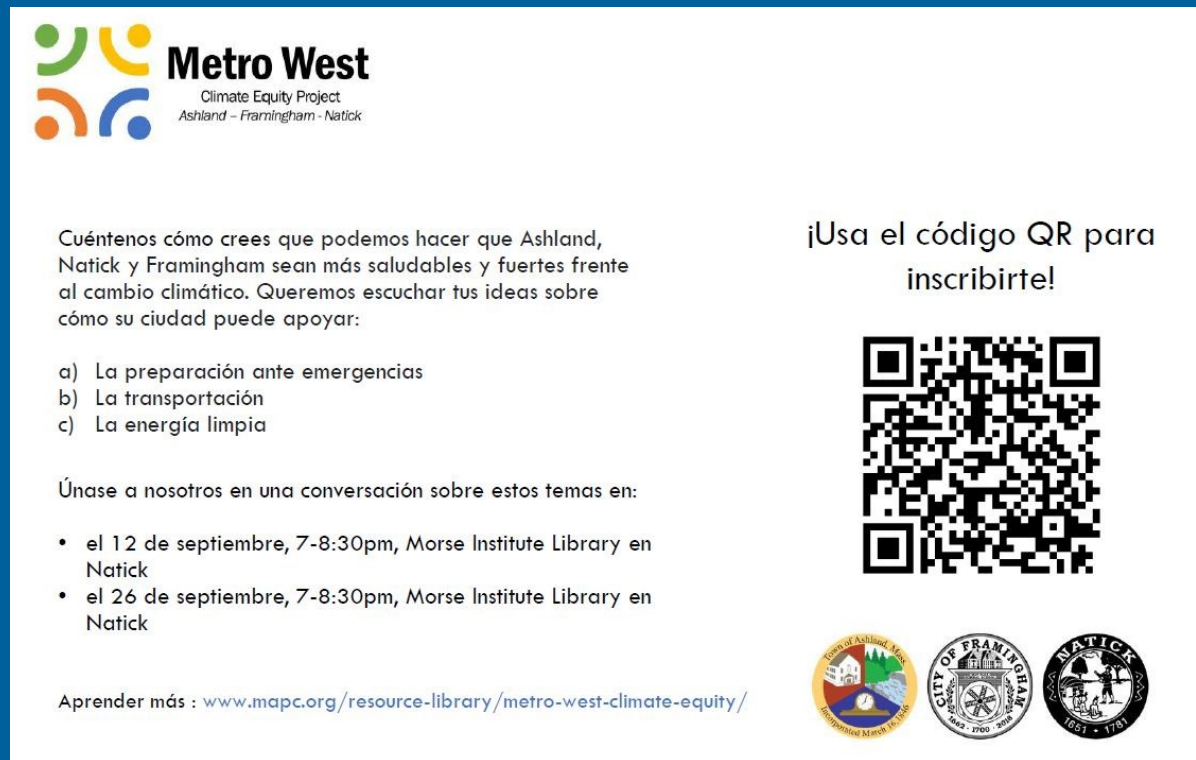
Tip: Reflect and iterate on project activities. Check-in with the D2A Community Participants throughout about what is and is not working well. Adjust methods and project team support accordingly.

STEP 8: CO-INTERPRET PROJECT RESULTS

- Host collaborative workshops with participants to make meaning out of results and reflect on the activity

- Ask each participant:
  - What's one result that stands out to you and why?
  - What could be causing that outcome?
  - What might happen as a result?

- Ask the group:
  - As you've been listening to each other, what thoughts have you had about bigger patterns that come out of these results?

- Reflect on additional project activities that may be needed to act on information
  - May need to return to *Steps 6 and 7* for new activities

Data Introduction/Orientation – Project Example

Linking
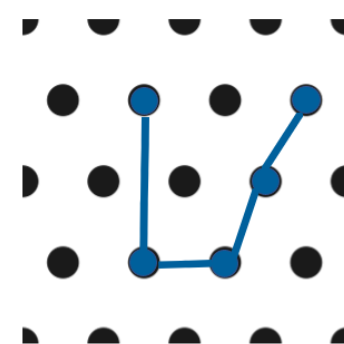
Making Connections Between Different Pieces of Data

Interpreting
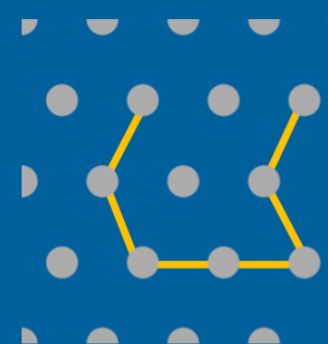
What's Going On? What Does the Data Say?

Making Meaning
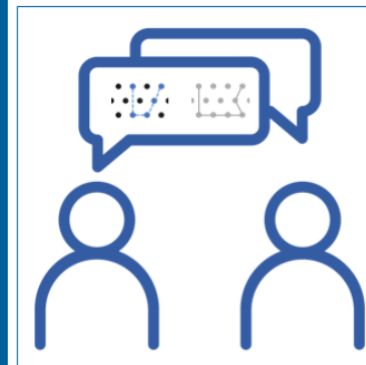
So What? Why is this important?

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Spotlight: Collaborative Data Analysis

Brief CDA Sample Visual Content

What is Data Analysis?

- Systematically trying to understand patterns in your data and make conclusions about what they mean.

- Data doesn't speak for itself. Analysis figures out the story by looking for patterns.

- Data analysis is systematic and methodical so that other people can trust your conclusions

- Analysis builds the bridge between data and action.
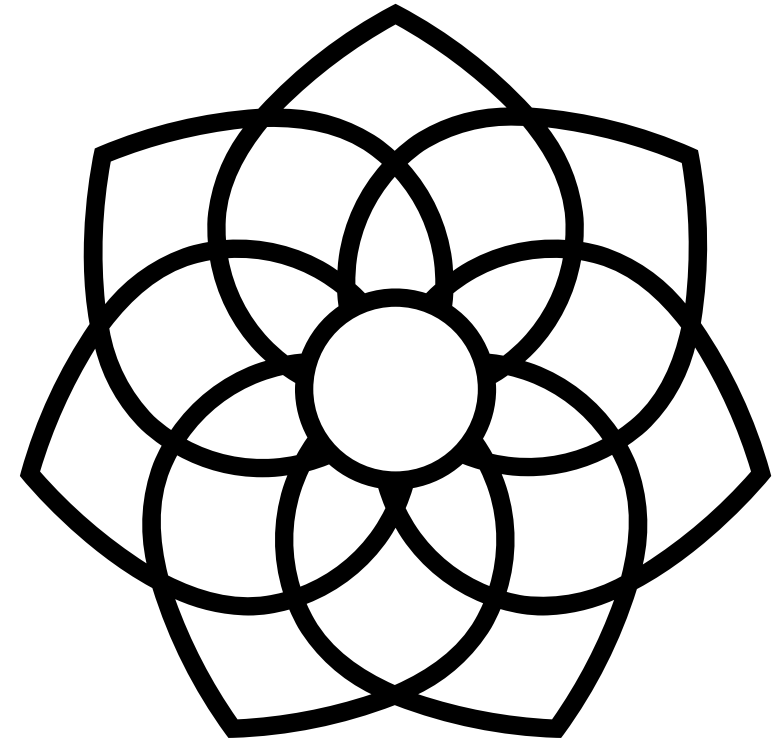
What is Data Analysis?

Example 1: "Finding the Signal through the Noise"
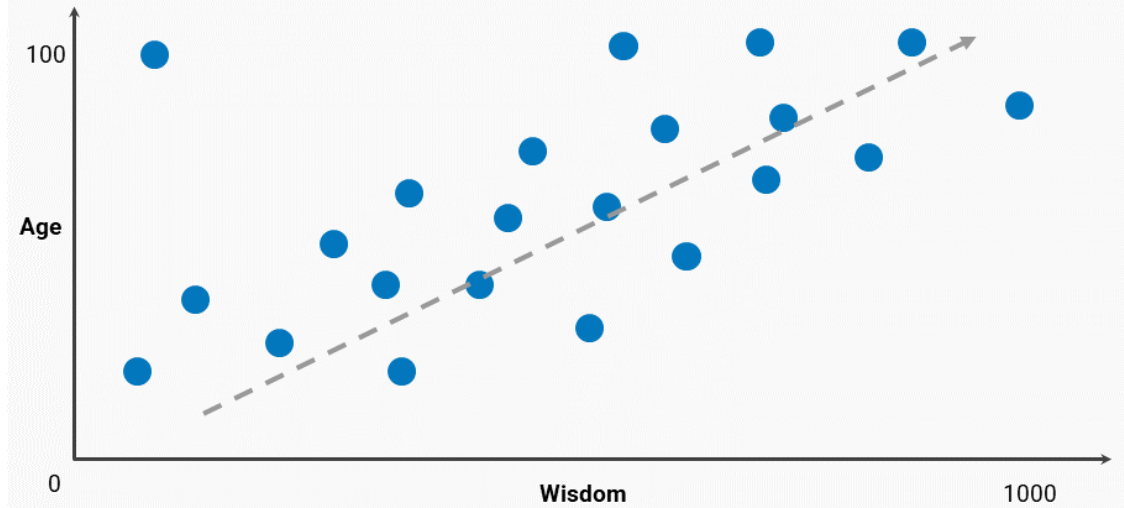
What does *Collaborative Data Analysis* mean?

- Emphasis on experiential expertise rather than technical expertise

- Understanding how data and patterns look from different perspectives

- Building a shared understanding

- Using that shared understanding to figure out what to do (how to act)
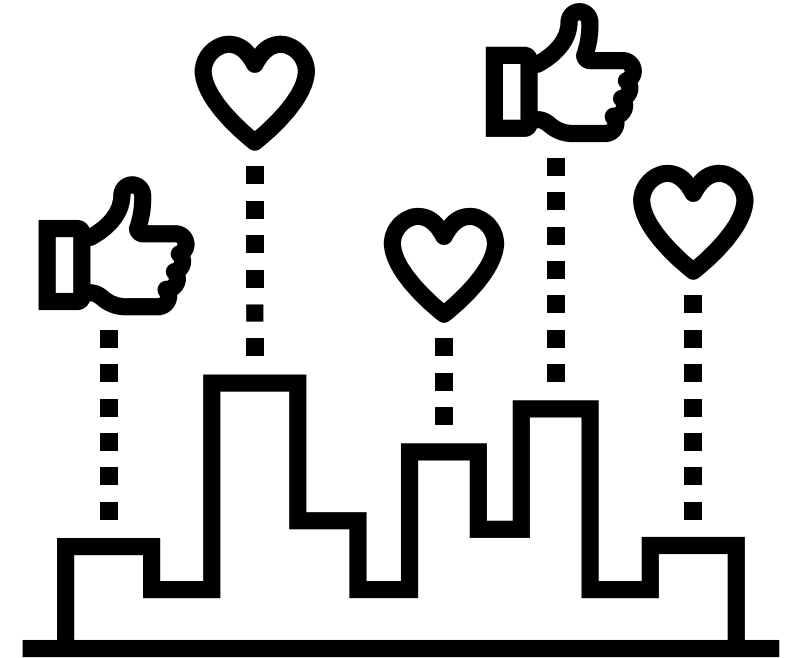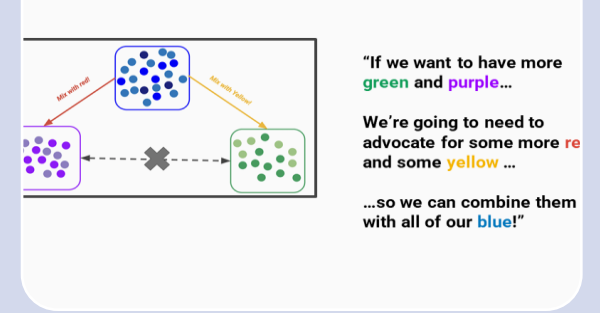
What is Collaborative Data Analysis?
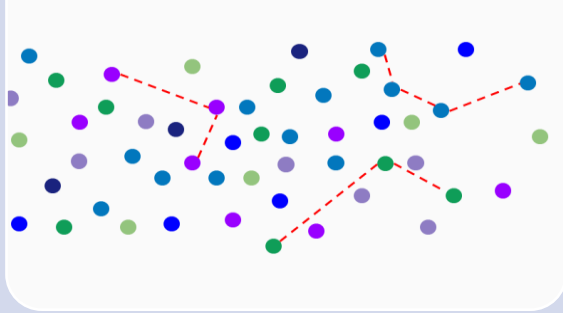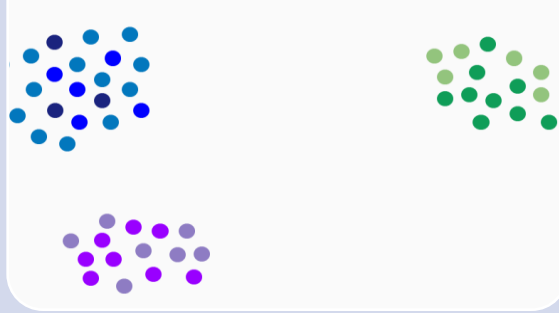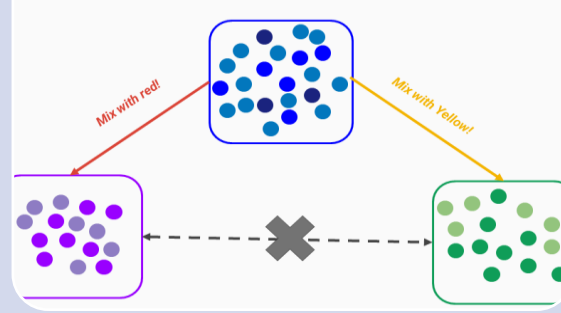
Linking

Drawing connections between pieces of data/findings

Interpreting

Identifying what is going on here and what the data 'says'

Modeling

Exploring how the data relate to and possibly influence each other

Meaning-making

Naming what is happening and why it is important

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How do we communicate findings?

- Findings are what is discovered through collaborative data analysis

- Findings can be used to start conversations, lead to additional data collection, and provoke action

- Communicating findings helps get others – neighbors, family, elected officials – more interested and invested in the data
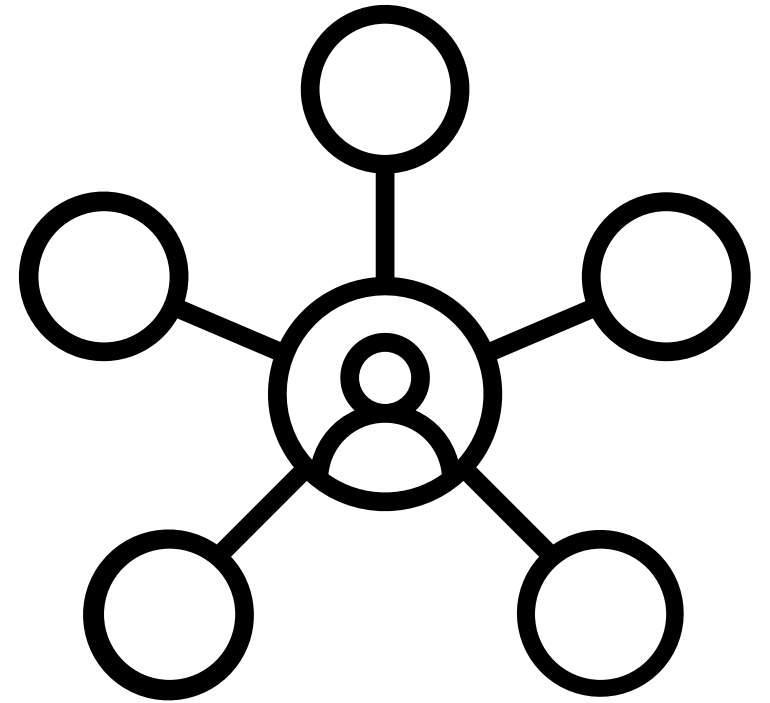
How do we communicate findings?

T-Shirt Slogan

T-shirt slogans are memorable and to the-point. Participants summarize (a set of) findings into a slogan that is then shared and discussed by the group.

Finding Cookies

Place key findings in small packages or edible forms (think fortune cookies) and share among a group. Let the act of discovery spark conversation and identify potential actions.
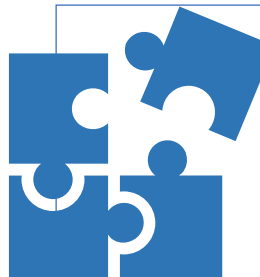
Complete the Puzzle

Provide participants with findings in the shape of puzzle pieces. Ask participants to combine findings into a 'picture' that can be shared with the group and inspire next steps.

Source: Public Profit, Dabbling in the Data: A Hands-on Guide to Participatory Data Analysis.

STEP 9: ACT

- Core to participatory engagement – and data to action work - is the importance of *moving to an action phase*

- Based on the project findings and D2A participants direction, determine what are the next steps for action

- Connect with community organizations, government agencies, residents, and other stakeholders to disseminate findings & discuss how they can use them

- Apply for grant funding, engage in fund raising, or use other steps to build budgets, as needed, to implement action steps
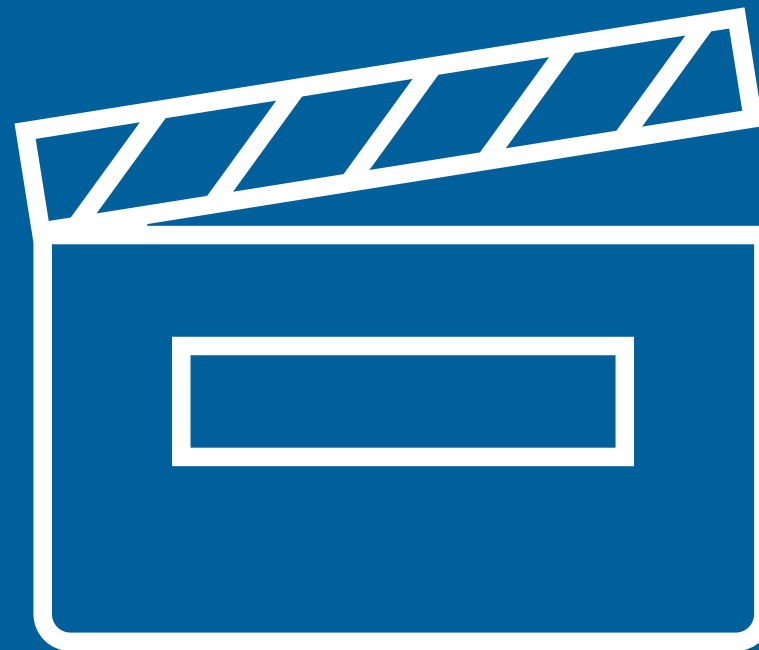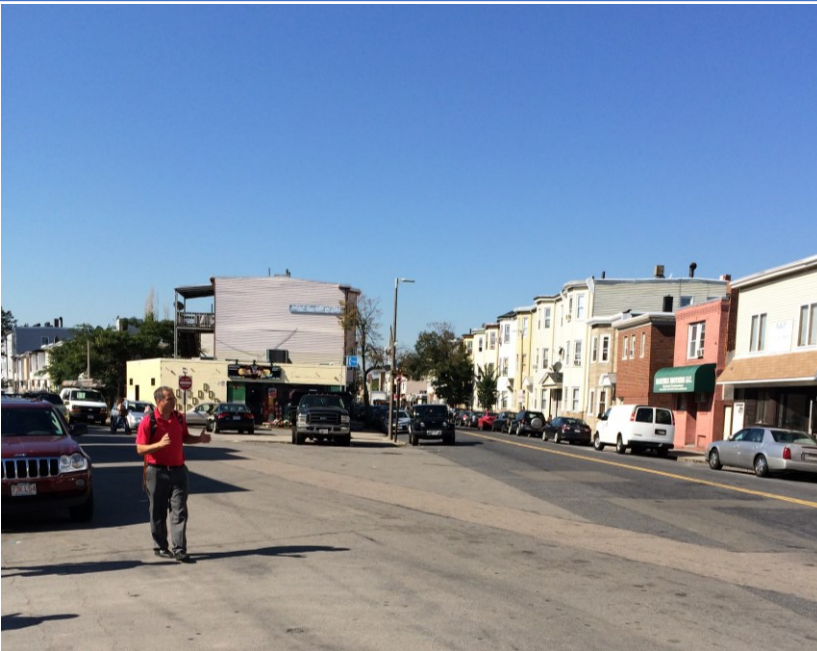
Example: Action

Community input- and experience- driven changes to improve neighborhood conditions, active transportation, and traffic safety in East Boston

2

The use of temporary materials to explore and provide an example of improvements to the intersection based on participant data collection and action ideas.

Featured here are temporary crosswalk markings, the use of traffic cones to change vehicular traffic patterns, and reducing the distances residents need to walk to cross the street.

1

Existing intersection with limited sidewalk and safe crossing for pedestrians, few traffic controls and lots of undefined roadway space, and parking that potential reduces traffic safety and visibility

3

Final improved intersection with
- Sidewalk extensions
- Striped crosswalks
- New traffic controls
- Shared lane bicycle markings

STEP 10: RECOGNIZE AND CELEBRATE

- Celebrate the work of the D2A Community Participants!

- Celebration can take many different forms:
  - Certificates of Excellence
  - Potluck
  - Group outing
  - Community event to share the work of the D2A Community Participants

MetroWest Climate Equity Project Example

COMMUNICATION IS KEY

- Ask the D2A Community Participants for their preferred mode of communication at the project start
  - You may need to communication with participants in different ways (email vs. Whatsapp vs. text)

- Different people have different needs and that's okay!
  - Some people may require more frequent communication than others

- Maintain transparency throughout the project
  - Be honest about what the municipality can do for residents and do not overpromise

- Be flexible! Things won't always go as planned.
  - Be prepared to through away your agenda and follow the participant's lead

REPITITION IS ALSO KEY.

- Data to Action is stronger and more effective when it is part of a continuous process of improvement.

- Action can lead to incremental changes that can lead to larger changes and that can possibly generate new data and interpretations.
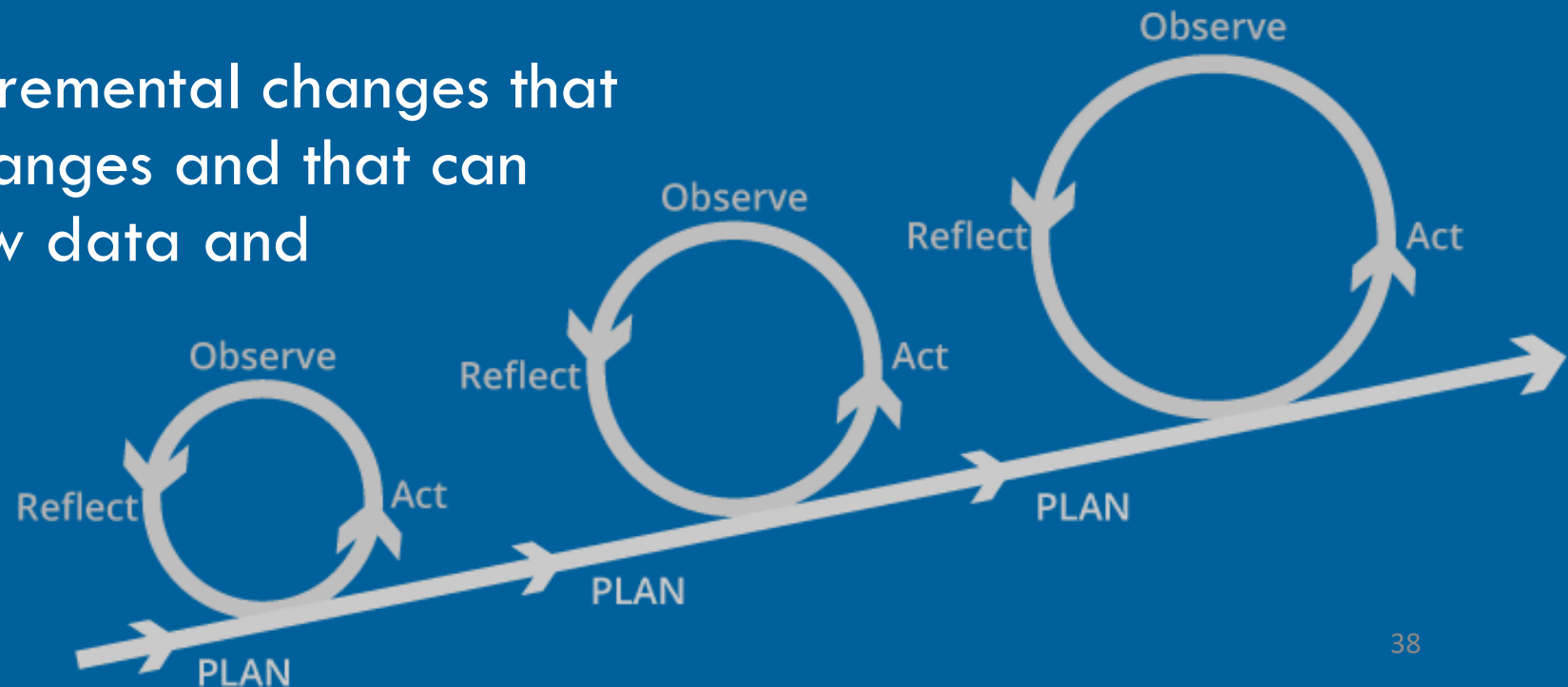
Participatory Engagement Model for Data to Action

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