



The CBO Engagement Playbook

Welcome to the Community-Based Organizations (CBO) Engagement Playbook

This playbook is provided by PublicInput as a customizable template to make your own. It is designed to help you evaluate your current practices, get organized, and tap into community organizations to **increase engagement and strengthen your relationship with your community.**

These first three pages are here to help you start your journey. Feel free to delete this section as you begin customizing your playbook.

Step one: Identify Key Internal Stakeholders

Effective engagement with CBOs begins with collaboration among community-facing departments within your organization. A few places we recommend starting:

- **Planning Teams** - Align CBO engagement with improved outcomes for strategic initiatives, plans, and capital projects.
- **Communications Teams** - This is often the home of community engagement, and improving CBO practices can have a quantifiable impact on communications goals.
- **Management** - Change is easier with leadership buy-in and ongoing support for engagement efforts.
- **Other Community-Facing Departments** - Teams that have direct interactions with the community can offer unique insights into our current relationships with CBOs.

Step two: Start a Conversation

Because teams have a lot on their plate, it's important to first get the right people "in the room" and bring their attention to improving engagement with and through CBOs.

Schedule a "CBO Engagement Review" meeting.

Organize a conversation with peers to review how you're engaging with CBOs, share research on the importance of their role in engagement (see the "More Resources" section), and establish a plan to take action.

A good meeting outcome includes a *commitment to reviewing practices* and *reconvening to share learnings* in a follow-up planning session.

Invite one-on-one feedback.

Some peers may not be comfortable expressing ideas or concerns in a group setting. Personal outreach and one-on-one conversations can go a long way in building internal alignment, ensuring you can enlist the support you need.

Step three: Customize Your Playbook

To make this playbook work for your organization, you'll need to personalize the content to reflect your unique circumstances, goals, and community landscape. Here are some key elements to consider:

- Replace [Your Organization] - Convert this placeholder to the name of your agency.
- Use your logo and colors - We've put in placeholders and basic styles for you to tailor.
- Upload it to a cloud document - make it easy for peers to access and comment.

As you edit the playbook, consider the specific language and terminology that resonates with your organizational culture and the communities you serve. It can be helpful to highlight specific examples of initiatives that could be impacted by CBO engagement, or past cases where community organizations played a key role in success.

Get Free Help From an Engagement Expert

PublicInput's team of engagement professionals has deep knowledge of community engagement best practices and the latest research on Community-based Organizations.

As part of the launch of our CBO network, we're offering free 30-minute consultations to evaluate your engagement, share best practices, and offer ways we can be a resource.

Please [use this link to schedule a free consultation](#) with a PublicInput engagement expert to ensure you get on the correct calendar.

Equip Your Team with the Latest Purpose-Built Technology

PublicInput has created two new tools to improve community engagement strategies for state and local governments: the Community-Based Organizations (CBO) module and the CBO Network.

These tools address the critical need for a centralized and efficient approach to managing and leveraging community group information, empowering public organizations to build public trust, increase engagement, and streamline collaboration.

[Schedule a discussion and live demonstration here](#) to view the module in action and preview the CBO Network.

A Note From Our Founders

When we started the journey to build a community engagement platform in 2014, we stumbled across a quote displayed in a friend's home: "Life is about the people you meet and the things you create with them."

The further down the path we go, the more that phrase rings true, and the more we believe in the power of *community* to tackle some of the greatest challenges we face as a society.

It's in that spirit that we've devoted our efforts to helping you build and maintain relationships - not only with individuals - but with the groups and organizations that define your community's fabric and civic life.

We hope you'll find this playbook a helpful starting point, and look forward to the opportunity to work together someday.

Two handwritten signatures in black ink. The first signature on the left is 'Jay Dawkins' and the second signature on the right is 'Graham Stone'. Both are written in a cursive, flowing style.

Jay Dawkins and Graham Stone

Co-Founders, PublicInput



[Organization Name] Community-Based Organizations (CBO) Engagement Playbook

An internal guide to standardizing the process for identifying Community-Based Organizations (CBOs) at work in the region, managing related data, and effectively engaging with key stakeholders and constituents.

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BUILDING A FOUNDATION FOR CBO DATA

1. Building a CBO Inventory

Creating an inventory of CBOs is the first step to unlocking more effective engagement. To get started:

Collaborate Within the Organization:

- Tap into the knowledge of communicators and connectors across different departments. Encourage them to share contacts and experiences with CBOs they've worked with or know of.

Gather the most critical data on each CBO.

Must-have information:

- Organization name
- Address
- Organization type
- Key contacts
 - Name
 - Phone
 - Email

Nice-to-have information:

- Geographic areas served
- Organization description
- Organization phone
- Organization website

More information now means fewer gaps later. [This template](#) is a helpful starting point for documenting an organization inventory.

Opportunities for sourcing data outside the organization

PublicInput's [CBO Network](#)

(<https://publicinput.com/wp/community-based-organizations-network>) has been compiled from a combination of sources and is a great way to quickly stand up a CBO database. If you're curious to see what data is out there, here are some additional options for populating an initial list of CBOs:

Tap peer organizations: Connect with peers at other local governments or agencies to collaborate in gathering and sharing CBOs and their contacts.

Attend Community Events: Engaging with CBOs at local events builds rapport, and can provide valuable contacts and a firsthand understanding of their missions and activities.

Search Public Records: Many CBOs are registered as non-profits, making public databases and records valuable for compiling an inventory.

IRS Tax Exempt Organization Search: The IRS provides a searchable database of tax-exempt organizations. Visit <https://www.irs.gov/charities-non-profits/tax-exempt-organization-search> to find nonprofits by location.

State Government Websites: Some states have online databases or lists of registered nonprofits on the Secretary of State's website. Look for a section related to charities or business entities.

Local Community Foundations: Contact a local community foundation. They may be willing to share a list of their nonprofit partners in the area.

Public Libraries: Some libraries offer access to databases, which you can use to search for nonprofits.

Combine sources into a comprehensive and central list. Be sure to check the date of the information, as nonprofit statuses can change.

Note: PublicInput's [CBO Network] is updated annually from several public and private data providers and includes data sourced by in-network peers.

2. Organizing and Mapping CBO Data

With an initial inventory completed, the next priority should be to understand who and where CBOs are engaging in the community.

Establish a master spreadsheet:

- Start with a simple spreadsheet including columns for organization name, contact information, organization type, and any other relevant details you've collected.
- [A free CBO spreadsheet template is available here.](#)
 - The template's headers and columns match PublicInput's standard format for uploading organizations to the software's CBO Module.

Categorize CBOs using the industry-standard taxonomy:

- Organize CBOs based on the industry-leading Candid nonprofit taxonomy, available in tabular format at [PublicInput.com/taxonomic-categories](https://publicinput.com/taxonomic-categories).

- Following a standard taxonomy simplifies coordination within the organization and when collaborating and sharing data with other agencies and consultants.

Geocode Addresses:

- Teams with internal GIS resources may be able to geocode addresses using tools like ESRI's geocoding API.
 - If addresses aren't in a standard format, ask if it's possible to apply a geographic bounding box on a region to prevent matching on addresses outside the expected area.
- When using PublicInput's [CBO Module](#) (<https://publicinput.com/wp/community-based-organizations-network>)
- , every imported organization is automatically geocoded with a bias toward agency location if it identifies multiple matches.

3. Identify Gaps

With CBO data organized and mapped, the next step is to identify gaps:

Analyze CBO Distribution:

- Use available GIS tools to visualize the geographic distribution of CBOs. Look for areas with few or no CBOs represented.
 - PublicInput's [Equity Mapping](#) interface allows for this analysis within the application

Identify Disadvantaged Communities:

- By working with a GIS team or within the [Equity Mapping Module](#), overlay CBO data with map layers for demographic indicators like income, age, language, and minority groups.
 - Commonly referenced datasets for this information include:
 - [EPA EJScreen](#)
 - [USDOT Equitable Transportation Community Explorer](#)
 - [HUD Qualified Census Tracts](#)
 - [Climate and Economic Justice Screening Tool](#)
 - Note: Some states including [California](#) and [Texas](#) have developed their own datasets that may be preferred.
- Consider whether the types of CBOs you've mapped adequately represent all community interests, especially those of marginalized or underserved groups.
 - It is common to see a lower concentration of CBOs in marginalized communities. [Recent research from Johns Hopkins](#) suggests that civic organizations are more likely to be found in more affluent communities.

Develop Strategies to fill identified gaps:

- For areas or demographics lacking representation, develop high-level strategies on who and how to engage.
 - This could involve more targeted research to find active CBOs in the area, or expanding the categories of organizations included in the search.

4. Establish A Plan to Maintain CBO Data

The final foundational step is establishing routines for sourcing and updating CBO data:

Update Regularly:

- Set calendar reminders with key team members to periodically review and update CBO data. These reminders can also be valuable checkpoints for assessing how the team is leveraging CBO relationships.
- Develop a standard procedure for all Staff and contracted consultants to catalog new CBO data as it becomes available to avoid a backlog of data entry tasks.
- Assign responsibility to a team or team member to keep data up to date.

Leverage technology to automate data entry tasks as much as possible.

- By subscribing to PublicInput's [CBO Network \(https://publicinput.com/wp/community-based-organizations-network\)](https://publicinput.com/wp/community-based-organizations-network) you'll benefit from regular data updates and other in-region peer organizations' engagement with CBOs.
- If an in-network agency or consultant adds or updates a shared organization's contacts during their engagement efforts, ensure they are added to the CBO database. This is also a default function within PublicInput.

STANDARDIZING A PROCESS FOR PARTNERING WITH CBOs

Developing a standardized approach to engaging with Community-Based Organizations (CBOs) ensures consistency in outreach efforts, as well as a respect for their past investments in relationships.

This section outlines key steps and best practices for establishing a process that fosters strong, productive relationships with CBOs.

1. Communicate the Central Source of Truth internally

Reinforcing the existence and importance of a single, reliable source of information about CBO engagement is crucial for internal alignment and efficiency.

Integration into Team Meetings:

- Regularly include CBO engagement updates in team meeting agendas. This keeps the importance of CBO relationships top of mind and allows for the sharing of progress, insights, and strategies across departments.

Internal Wiki or Intranet:

- Assign a dedicated page on the internal wiki or intranet where team members can find guidance on engaging with CBOs, access the CBO database, and share success stories or learnings.
- Link to PublicInput's [CBO Module](https://publicinput.com/wp/community-based-organizations-network) (<https://publicinput.com/wp/community-based-organizations-network>) as a central repository for all CBO-related information. This ensures that data is accessible, up-to-date, and shared across departments or consultants.

2. Document How Data Can Be Accessed and Updated

Clear documentation on how to access and update CBO data is essential for maintaining the integrity of a central source of truth.

Access Guidelines:

- Provide detailed instructions on how team members can access the CBO database within PublicInput. Include steps for viewing, adding, or editing CBO information.

Updating Procedures:

- Outline the process for updating CBO data, including who is responsible for updates, how often updates should occur, and the types of updates that might be needed (e.g., contact changes, new CBOs, etc.).

3. Suggest Best Approaches for Wording Outreach

Effective communication with CBOs requires thoughtful, engaging messaging that resonates with their mission and the interests of their constituents.

Messaging Templates:

- Develop template messages for initial outreach and ongoing communication with CBOs. Templates should be customizable to address the specific context and goals of the engagement.

Engagement Tips:

- Offer guidance on how to personalize messages to reflect an understanding of the CBO's work and its impact on the community. Include tips for making outreach more compelling, such as highlighting mutual benefits and offering clear next steps for collaboration.

4. Enable Teams with Tools and Resources

Ensure that teams have the tools and resources to engage with CBOs effectively.

Training Sessions:

- Schedule training sessions covering how to access the CBO database, using any analysis tools like Equity Mapping, and how to add or update CBO information.

Shared Learnings:

- Create time for team leaders to share insights and lessons from CBO engagements across different teams and departments.
 - This can be part of regular training sessions or during a dedicated meeting.
- Document any lessons learned in the playbook or internal wiki and send a brief summary to teams who interface with CBOs.

Designate an internal CBO “knowledge keeper”:

- This person is a go-to for questions about CBOs for others across the organization.
- Responsible for regular reviews of CBO data and documentation to evaluate if updates or changes may be required.
- Should be familiar with CBO management tools and historical knowledge to be a resource for bringing others up to speed

By standardizing on a working process, engagements with CBOs are more consistent. This increases the likelihood of trust with important stakeholders and increased public engagement with their constituents.

REACHING OUT TO CBOs

Effective outreach to Community-Based Organizations (CBOs) is key to fostering productive partnerships and enhancing public engagement. Here's how to craft messages that resonate.

1. Begin with an understanding of what’s in it for the CBO

Community-based organizations (CBOs) often operate under limited resources and time constraints. There may even be trust issues to overcome if past government interactions were unfavorable.

For local governments looking to partner with these organizations and establish a baseline set of expectations, it's crucial to clearly articulate the benefits of collaboration.

Policy Influence and Advocacy

Engagement with local governments provides CBOs a platform to directly influence policy or the project at hand. By being involved in the decision-making process, CBOs can advocate for changes that directly benefit their community.

Increased Visibility

Collaborating with local governments can also raise a CBO's profile within the community and beyond. This increased visibility can increase the organization's influence and ability to advocate for its constituents.

Strengthened Community Ties

These partnerships can lead to new connections with other stakeholders and potential collaborators, broadening the support network available to both the CBO and its community.

Improved Outcomes through Collaboration

By combining resources and expertise, CBOs and local governments can implement more holistic approaches that yield better outcomes for the communities they serve.

2. Craft a Compelling Message and Call to Action

When drafting messages to CBOs, emphasize the tangible benefits for their constituents. The following template message highlights a few best practices:

Bottom line up front:

- Make it clear why you are reaching out in the first sentence of the email

Include the organization's name and agency name prominently

- Ideally, the subject line should make it clear who you are with

Make it clear you see their input as important, and that you need their help

- This outreach is not about us - it's about them

Be specific about what you're asking for

- If you're looking to get a survey out, include the link on its own line
- For public meetings, include time, venue, location and a link to register

Consider including a translation

- PublicInput provides automatic email translation links, but you can also opt to directly include an alternate language copy if you know the group's preferred language.

Sample CBO outreach email

Subject: [Agency name] engagement with [CBO name] on [Project name]

Dear [CBO Contact Name],

I'm contacting you because [Agency name] is working on a project that could impact your [members/constituents/community].

We need your help getting the word out about the project and the opportunity to provide input on this survey:

[Survey link]

Can you share this information with your distribution list, upcoming announcements, or directly with the people you serve?

We see groups like yours as essential partners in increasing community engagement. I'm here to answer any questions and relay any feedback you have.

Best regards,

[Your Name]

[Agency Name]

[Link to translate this email]

2. Make It Easy for CBO Contacts to Reply

Provide CBOs with ready-to-use, customizable messaging they can easily forward or share with their members and constituents.

Make it clear they can reply and ask questions.

- Although the prospect of having to manage email replies can be daunting, reply rates are typically less than 20%.
- This first interaction is an opportunity to build rapport.

Keep replies out of inbox silos.

- If an email endpoint is available using a tool like PublicInput’s email platform, forward comments to the relevant project inbox so they can be memorialized and analyzed alongside online and in-person comments.
- If PublicInput is not available, capture email replies to a spreadsheet saved with project records, and consider sharing the replies with the lead CBO “knowledge keeper” so they can be reviewed during CBO best practice sessions.

3. Make It Easy for CBO Contacts to Engage

Simplifying the engagement process encourages more active participation from CBOs and their constituents.

Include a link to take action:

- If you have a website where their members can engage, such as a PublicInput project site, feature the link prominently.

Promote event registrations:

- Using a tool like [PublicInput’s meeting module](#), encourage people to register to attend a meeting.
- Registration is helpful for planning purposes and reporting who you’re engaging.
- Avoid requiring registration as some populations are less willing to provide personal information in the first interaction.

4. Close the loop following an engagement

Closing the feedback loop to let people know the outcome of an engagement process is a proven way to build public trust. The same concept applies to CBO engagement.

At the conclusion of a project or engagement initiative, it’s important to follow up with CBO contacts at least via email, and potentially over the phone with the following:

- Outcomes of the public engagement process
- Where their constituents can review related documents or plans
- Potential timeline for any upcoming changes
- How to stay informed about this topic or initiative

By creating a closed feedback loop, we convey that we have taken their feedback into account - even if the outcome of a decision or project doesn’t go their way. Each of the prior steps in the process culminate in this step, teeing up the opportunity to re-engage in subsequent projects.

ADDITIONAL RESOURCES

Research

[Institute for Local Government Research](#): Partnering with Community-Based Organizations for builds broad-based Public Engagement.

PublicInput's [2023 National Resident Survey Results](#): Engaging residents through groups they identify with builds public trust and increases participation.

Johns Hopkins [Civic Opportunity Heat Map](#): Research and data on civic organizations' distribution and how it affects community engagement.

The National Civic League's [Mapping America's Healthy Democracy Ecosystem](#): A list of organizations, funders, and practitioners working to improve American democracy.

Tools

[Engagement Timeline Template](#): A tool to organize and visualize the engagement process.

[Shared Outcomes & Metrics Template](#): Helps track progress and engagement feedback, enabling stakeholders to visualize feedback and outcomes.

[PublicInput CBO Module and CBO Network](#): purpose-built software to streamline the management of CBO data and engagement. The North American CBO network features a geo-coded dataset of over 500,000 community-based organizations.