



TOOL: DETERMINE ENGAGEMENT PURPOSE

Engagement works best when people understand why they are being asked to participate and how their input will be used.

Good engagement starts with purpose. Before choosing a method or inviting people to participate, clarify what the engagement is about, what you need to learn, what people can meaningfully influence, what is already fixed, and how input will be used.

This worksheet helps you draft a plain-language engagement purpose statement that can guide your engagement methods, invitations, questions, and follow-up communication.

First, reflect on the guiding questions. **Then** use the madlibs on the next page to draft an engagement purpose statement.

Guiding Questions

- What decision, design, review, or improvement process are we engaging people about?
- Who needs to be engaged and why to their perspectives matter?
- What do we need to learn from people?
- What can people meaningfully influence?
- What is already fixed or constrained?
- What should we avoid asking because it is not open to influence?
- How will input be used?
- How will we close the loop?

ENGAGEMENT PURPOSE MADLIBS

Use the example templates to help you draft an engagement purpose statement.

E.g., Simplified

We are engaging **[who]** to help us **[learn/understand/shape/test/refine]** **[what]** so that **[decision/change/process]** is more **[clear/useful/equitable/practical/sustainable]**.

E.g., What is open to influence

Participants will help shape **[what is open to influence]**. Some elements, including **[fixed constraints]**, are already determined because of **[policy/resource/timeline/accreditation/legislative reason]**.

E.g., Contribution and use of input

We are inviting **[who]** to participate because they bring **[experience/knowledge/responsibility/perspective]** related to **[issue/process/service/program]**. Their input will help us **[identify/understand/prioritize/design/test/refine]** **[what]** and will be used to inform **[decisions/recommendations/next step/action plan]**.

ENGAGEMENT STATEMENT

Write your engagement statement here.