



EFFECTIVE ENGAGEMENT

ARTICLE 80 Modernization

Early Engagement Toolkit

Includes:

Overview of tools & resources

Site Walk Facilitation Guide

Project Introduction Workshop Guide

Popup Tabling Guide

Early Engagement Survey Guide

CITY of BOSTON



City of Boston
Planning Department



EARLY ENGAGEMENT TOOLKIT

OVERVIEW

This toolkit provides a series of resources based on existing best practices to help you be successful in engaging Boston's communities before filing your project with the Planning Department. These resources are intended to support your efforts, but are not required, and are not comprehensive of all options that can lead to successful early engagement.

WHAT IS EARLY ENGAGEMENT?

Early Engagement refers to all community engagement that takes place before development projects over 20,000 square feet are formally

filed with the Planning Department. This phase of engagement may include things like conversations, meetings, site walks, and workshops. Successful developers often lead a variety of community engagement efforts before filing their Small Project Review Application (SPRA) or Project Notification Form (PNF) with the Planning Department.

WHY IS IT IMPORTANT?

Early Engagement is important because it allows project proponents to build trust with communities, understand key community needs in relation to the project, identify key tradeoffs, and opportunities to reflect relevant feedback in upcoming filings. As a result, projects with intentional and high quality early engagement efforts tend to have a more efficient and timely review process.

OUTCOMES

- *Inform communities about proposed development*
- *Create opportunities to build trust in the community*
- *Identify opportunities to reflect community needs in proposed projects*

STAKEHOLDER ROLES

Various stakeholders play a role in making early engagement efforts successful. See below for the roles of key stakeholders.

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Role of Proponent

The Proponent leads all aspects of early engagement efforts. As part of the City's required Small Project Review Application (SPRA) or Project Notification Form (PNF) filing, Proponents will be asked to fill out an early engagement report listing any early engagement conducted and key learnings from that engagement.

Role of Planning Department

The Planning Department has provided the early engagement toolkit with resources that Proponents can use to lead successful early engagement activities. If requested, the Planning Department can offer project-specific guidance on outreach for Proponents to gain understanding of the perspectives and needs that exist in Boston's communities.

Role of Community

The community provides an important source of knowledge about the neighborhood, everyday context, and key tradeoffs.

TYPES OF ENGAGEMENT

There are a wide variety of ways to engage the community, such as attending and sharing information about projects at civic or neighborhood association meetings. While these common approaches remain useful, the Planning Department has created the below resources to support proponents in expanding awareness of the project and gather feedback and ideas from those with a variety of perspectives.

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| | Site Walk | Project Introduction Workshop | Popup Tabling | Early Engagement Survey |
|-------------|---|--|--|---|
| What is it? | One hour walk around the project site and nearby area, within 0.5 miles of the project site | One-to-1.5 hour virtual or in-person meeting either as part of an existing community meeting or independently hosted | Staffed informational table at events or other places of community gatherings | Engagement formats such as surveys, questionnaires, or polls to reach people with limited time |
| Purpose | Observe and learn from the community about existing conditions, historical context, and discuss tradeoffs | Relational opportunity to share information about the project and receive initial feedback via an interactive format | Informal opportunity for community members to learn about and ask questions about the initial project idea | Low time commitment method that allows a broader subset of community members to share their perspective |

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| | Site Walk | Project Introduction Workshop | Popup Tabling | Early Engagement Survey |
|-----------------|--|--|---|--|
| Best Suited For | Developers seeking to build trust with the community, proponents of large and complicated projects, or projects in historically marginalized locations | Large development projects and PDAs looking for input on specific project features | New proponents looking to build relationships in the community Projects that have done some engagement and want to get input on key questions related to the project | Projects that have done some qualitative engagement and could benefit from broader community perspectives and feedback |
| Time | Outreach and prep: 3 hours On the day: 1.5 hours | Outreach and prep: 3 hours On the day: 2 hours | Outreach and prep: 2 hours On the day: 2 hours each day | Survey development: 1 hour Outreach: 1 hour Analysis: 1 hour |

ACCESSIBILITY BEST PRACTICES

While not required, the following best practices can be useful to ensure all community members are able to learn about projects and share their feedback with your team.

Choosing a Location

- Is accessible by public transportation
- Is well used and can be easily identified by community members (eg. community center, library, etc)
- Is ADA compliant

Communication & Engagement

- Offer information and details about the event in advance
- For site walks or other in-person events, mention mobility options and the terrain (including whether there are stairs, a steep hill, etc)
- Provide multiple options for people to share their feedback (eg written, visual, or verbal formats)

Registration

- If collecting registration information, include a question or field to allow people to share any interpretation or other accommodation requests/ needs
- Based on the population living or spending time near your project location, consider providing options such as multilingual translation or interpretation, ASL interpretation, CART interpreter, closed captioning, etc.

Content Presentation

- All materials should be written or explained using plain language that does not include jargon or acronyms
- Any visuals or images should be described, either via written text or verbally

DOCUMENTATION OF EARLY ENGAGEMENT EFFORTS

As part of the Small Project Review Application (SPRA) and Project Notification Form (PNF) submission form, proponents will be asked to include a summary of any/ all engagement conducted before filing. To support you in being prepared, the information that will be requested as part of the Early Engagement Report is included here.



See below for Early Engagement documentation that will be requested in initial filing (Project Notification Form (PNF) or Small Project Review Application (SPRA))

List the type(s), date(s), and location(s) of the engagement

- Describe the type(s) of engagement conducted and the outreach efforts you undertook, eg. site walk with abutters, meeting held at YMCA, etc
- If you led multiple engagement activities please provide the dates and locations for each engagement
- Pictures, charts, or visuals of the engagement(s) may also be included

Share an estimate of the number of people you engaged

- Mention how many people in total you engaged through your efforts
- If you held multiple engagement opportunities, please include the number of attendees at each

Who did you engage with through these efforts?

- Share the groups and/or populations who you focused on engaging, eg. abutters, youth, the names of community organizations, etc

Based on what you heard during early engagement, share your top three takeaways

- These could include preferred tradeoffs, key questions you will address in future engagements, top community concerns or priorities, etc