GO FORWARD
A COMMUNITY INVESTMENT IN TRANSIT

WAKE TRANSIT PLAN

Level 1 - Engagement Plan

DATE SUBMITTED: 01/01/2025

Every Wake Transit-funded project requiring engagement needs a Level 1 - Engagement Plan form/packet and a minimum of one Level 2 – Engagement Phase Strategy form/packet. The Level 1 packet includes, at minimum, the engagement plan for the project and a completed engagement equity analysis. Project sponsors and consultants can use this outline as a fillable template for developing the project's engagement plan. They may also use it as a point of reference to ensure its components are included and documented in a format of their choice.

Level 1 information can be presented to TPAC's Community Engagement Subcommittee upon completion, but at least 1 month prior to launching any planned engagement activities. If the first engagement phase begins shortly after the plan is drafted, project sponsors may submit and present both the Level 1 and Level 2 packets at the same meeting.

Please save a copy to the Wake Transit SharePoint site, https://gotriangle.sharepoint.com/sites/WakeTransit.
Each Wake Transit partner agency's folder is listed under WT Engagement. Please create a new project folder and upload the Level 1 – Engagement Plan; Level 2 – Engagement Phase Strategy; and, Level 3 - Summary Report materials. Please also contact and/or submit materials to stephanie.plancich@campo-nc.us and rhayes@gotriangle.org for inclusion on an upcoming meeting agenda for TPAC's Community Engagement Subcommittee.

Section 1: Project overview

Project Name:

Project ID#:

Project Timeline:

Project Sponsor/Lead Agency:

Contact Person:

Phone:

Email Address:

Select Activity Type: (1) Wake Transit Program-Level Activity (2) Sponsor Project-Level Activity

Engagement Budget for project: $________

Project/Engagement Contacts:

Do you have consultant support for this activity? Yes No

Consultant Company:

Contact Name:

Contact Email:

List all agencies and organizations who will have an execution role in this project's engagement activities:

Agency/Organization	Name	Role/Responsibility

Section 2: Engagement Plan

Please write in your project specific information for each heading below.

Project Description

General description of the project, what problem is it attempting to solve, what is the scope and schedule (can be attached), how will engagement impact the process, etc.

Engagement Equity Analysis

If conducting a Wake County-wide engagement effort, project sponsors can choose to use the Engagement Equity Analysis Worksheet to guide their discussion. In other cases, the Engagement Equity Analysis Worksheet can be used to conduct an analysis specific to a project's geographic boundary. Save equity analysis results and planning documents on the Wake Transit SharePoint site in your WT Engagement folder. Summarize the process and equity results here.

Target Audiences and Performance Measures

On the table below, list all of the target audiences identified for this project. This includes population groups identified through the engagement equity analysis process, as well as other groups that the project team has identified as important to the decision-making process. For each audience, set one or more performance measures to gauge your effectiveness in involving them in the planning process.

Target Audience Group	Performance Target
Ex. Elderly 65+ residents	*9% of survey and event participation (Countywide ACS senior/elderly statistics)*
Ex. Small Business Owners	*Hold a business owner targeted event in each phase of engagement, conduct outreach to drive traffic to the project webpage*

Section 3: Engagement Phase Outline

Phase 1 Description:

Anticipated timeline for execution:

Budget for this phase of engagement:

Lead/point of contact for this phase:

Highlight the purpose of this engagement effort:

Inform	Consult	Involve	Collaborate	Empower	Close the Loop
Share information; educate	Obtain and consider public feedback	Public input is integrated into decision-making	Partner with public in shared decision-making	Public input makes final decision	Sharing process results with the community

Please provide an overview of this phase: purpose, methods of outreach, general timeframe, and how the results will inform the project planning/development process, etc.

Phase 2 Description:

Anticipated timeline for execution:

Budget for this phase of engagement:

Who is the lead/point of contact for this phase:

Highlight the purpose of this engagement effort:

Inform	Consult	Involve	Collaborate	Empower	Close the Loop
Share information; educate	Obtain and consider public feedback	Public input is integrated into decision-making	Partner with public in shared decision-making	Public input makes final decision	Sharing process results with the community

Provide an overview of this phase: purpose, methods of outreach, general timeframe, and how results will inform the project planning/development process.

***Add more phase sections as needed for your project.**

Section 4: Project Wrap Up with the Community

An example Engagement Summary Report and a Level 3 outline is provided in the WT Engagement SharePoint folder. Each phase of engagement will be included as a section of the project's final summary report. The project sponsor will determine which engagement progress information will be shared throughout the project life cycle and how it will be communicated and closed out with the community.

For most projects, it is suggested to add the Engagement Summary Report as an appendix to the final document(s). It is important to circle back with the community and targeted audiences explaining the contributions they made and the impacts their feedback may have had on the project.

Please list all of the ways in which you plan to share the results of your project or announce the completion of the project to the community, stakeholders, boards, etc. Examples may include the following channels and activities: social media posts, website content, newsletter articles and briefs, news releases, word-of-mouth efforts like announcements at community events and board meetings, email blasts, and celebration signs at project locations.

Method of Communication	Person/Organization Responsible

Submission and Presentation Information

What month/year do you plan to give your Level 1 - Engagement Plan presentation to the Community Engagement Subcommittee? It typically meets the 4th Thursday of each month. A recommendation is to present at least two meetings prior to launching your first engagement phase, but the rule of thumb is a minimum of one (1) month before.

Month/year Level 1 information is expected to be presented to CE Subcommittee: _________/_________

If known, month/year that Level 2 strategy will be presented: _________/_________

Attachments to include with your Level 1 – Engagement Plan document.

1. Engagement Equity Analysis
2. Other supporting documentation
3. Level-2 strategy materials, if launching within 1-2 months

Please email your completed forms to stephanie.plancich@campo-nc.us and rhayes@gotriangle.org for timely placement on the Community Engagement Subcommittee meeting agenda.

ENGAGEMENT EQUITY ANALYSIS WORKSHEET:

The purpose of a CE equity analysis is to determine if targeted outreach efforts are required to reach specified population groups within the activity geographic boundary.

Step 1: Determine if a CE equity analysis is required for this effort.

If no, explain why here:

Ex. NO – it's a Wake Transit administrative document subject to the countywide engagement performance goals. Ex. NO – it's an effort directed only to a specific audience (Ex. Board members, city planners, bus operators, local chambers of commerce). Rider surveys could be different.

If yes or unsure, use the CAMPO communities of concern map, local knowledge and/or other relevant data to identify where high concentrations of traditionally underserved populations are located.

NOTE: You can use the **Engagement Tactics Checklist** to identify the most appropriate outreach methods to use for your activity.

Step 2: List the population groups that will receive targeted outreach	**Step 3: List the specific locations to reach each group**	**Step 4: Materials and methods to be utilized for each group**
Ex. Riders on Rt. 3	Ex. In-Person, On-Board Q&A, pop-up event at Rt 3 bus stop at Main & Walnut, TV notice on bus and at stations, GoForward social media	Ex. Bus placards, notice for TV and social media posts, survey, flyers for bus stops
Ex. Seniors and disabled	Ex. Partner with senior center staff, assisted living facilities and advocate groups within ¼ mile of Western BRT corridor, Door-to-door flier drop off, special meetings, onsite surveys	Ex. Printable flyers, printable survey, set up a special meeting, project presentation, tabling on-site

Explain how you completed the equity analysis:

Overlaid project map with CAMPO COC maps, spoke with project team to identify vulnerable populations located along the corridor that maybe weren't shown on the maps but were important to involve in the decision making process, and asked the CTT if they had any additional target goals that the project team should include.

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Level 2 - Engagement Phase Strategy

Every Wake Transit-funded project requiring engagement needs a Level 1 - Engagement Plan form/packet and a minimum of one Level 2 – Engagement Phase Strategy form/packet. A complete Level 2 packet for each phase includes this Engagement Phase Strategy form, the Engagement Tactics Checklist, and the Communication Tools Checklist. Project managers are asked to complete and present their Level 1 plan and each Level 2 strategy packet to the Community Engagement Subcommittee at least one month prior to launching planned engagement activities.

Please save a copy to the Wake Transit SharePoint site, https://gotriangle.sharepoint.com/sites/WakeTransit. Each Wake Transit partner agency's folder is listed under WT Engagement. Please create a new project folder and upload the Level 1 – Engagement Plan; Level 2 – Engagement Phase Strategy; and, Level 3 - Summary Report materials. Please also contact and/or submit materials to stephanie.plancich@campo-nc.us and rhayes@gotriangle.org for inclusion on an upcoming meeting agenda for TPAC's Community Engagement Subcommittee.

Date:

Project Name:

Project ID#:

Phase Number:

Phase Title:

Engagement Activity Date(s):

Project Sponsor/Lead Agency:

Which month do you plan to present to the Community Engagement Subcommittee? Month/Year

Contact Person:

Phone:

Email Address:

Select Your Activity Type: (1) Wake Transit Program-Level Activity (2) Sponsor Project-Level Activity

Do you have consultant support for this activity? Yes No

Consultant Company/Contact Name:

Select purpose of this engagement phase (choose all that apply):

Inform	Consult	Involve	Collaborate	Empower	Close the Loop
Share information; educate	Obtain and consider public feedback	Public input is integrated into decision-making	Partner with public in shared decision-making	Public input makes final decision	Sharing process results with the community

Write a brief description of this engagement phase: Who, what, when, where, why, and how are you launching this engagement effort or activity?

(Example) There are five (5) engagement phases for this project: **1-**Transit Priorities, **2-**Funding Scenarios, **3-**Draft Plan/PMP/Policies, **4-**Recommended, and **5-**Wrap Up. There are five (5) engagement phases for this project: **1-**Transit Priorities, **2-**Funding Scenarios, **3-**Draft Plan/PMP/Policies, **4-**Recommended, and **5-**Wrap Up. There are five (5) engagement phases for this project: **1-**Transit Priorities, **2-**Funding Scenarios, **3-**Draft Plan/PMP/Policies, **4-**Recommended, and **5-**Wrap Up.

Phase Schedule

Process Step	**Deliverable(s)**	**Timeline**
Level 2 Planning	Level 2 strategy form Communication checklist Engagement checklist	
Material Development	Electronic and print materials, translation services, distribution plan, and collection plan.	
Partner and Support Recruitment	Educate and provide materials and guidance to partners who will support Phase 2.	
Strategy Execution	Conducting engagement and communications activities, tracking performance, and measuring participation.	
Summary Report	The draft engagement summary report (ESR) for each phase of engagement should be added at the end of the project.	
Engagement Evaluation	Conduct an after-action review to note what went well and identify opportunities to improve.	

Geographic boundary of this project? (Corridor, countywide, municipal boundary, etc.?)

Was an engagement equity analysis completed for this project? Yes No

Social Media Schedule

Post Date	Post Type	Key Message(s)
Post 1 - 01.01.25	Video, YouTube	Call to Action
Post 2 - 00.00.00	Post, FB, IG, X	
Post 3 - 00.00.00	Video, LinkedIn	
Post 4 - 00.00.00	Post, FB, IG, X	
Post 5 - 00.00.00	Video, FB, IG, X	
Post 6 - 00.00.00	Post, LinkedIn	
Post 7 - 00.00.00	Video, YouTube	
Post 8 - 01.31.25	Post, FB, IG, X	Call to Action

Support Requested from TPAC Partners (add rows as needed)

Partner Support Description	Date(s)
Share, like, and comment on social media posts	
Inform boards, councils, committees, and staff	
Host at least one event in your community	
Share notices on websites and in newsletters	
Post signs at stops and on buses	
Place flyers in high traffic areas	
Word of mouth—tell everyone!	

Audience Engagement Objectives (add rows as needed)

Target Audience	Performance Goal	#	%	Tactics
Age 18-32				
Age 65+				
Disabled				
Low Income				
LEP - Spanish				
LEP- Other				
Hispanic/ Latino				
Minority: African Americans				
Minority: Asian				
Minority: Other (write in)				
K-12 Elementary				
K-12 Middle/Junior				
K-12				

High School				
College/ University				
Business Community				
Non-Profit Organizations				
Advocacy Organizations				
Wake Transit Partners				
Boards/Elected Officials				
Media				

Checklist: Engagement Tactics by Target Audience

Project Name:	Project ID#:
Contact Name:	Phone:
Email Address:	

Engagement Effort	Tactic	General Public	Elected Officials	Wake Transit Partners	Wake Transit Stakeholders	Bus Riders	Youth <17	Age 18-32	Age 65+	Disabled Community	Low Income	LEP - Spanish	LEP-Other___	Minority___	Business Community	Higher Education Facilities	K-12 Representatives	Non-Profit/NG Organizations	Other___	Other___
Events and Activities	Online surveys / comment boxes																			
	Print surveys / comment cards																			
	SMS surveys																			
	Voicemail box																			
	In-person / virtual focus groups																			
	In-person / virtual trainings																			
	Pop-ups at bus stops, transit centers & community sites																			
	Tabling at festivals, parades, job, resource & health fairs, and other community events																			
	Educational events																			
	Major holiday celebrations																			
	Community meetings																			
	Group presentations																			
	Public hearings																			
	Town halls																			
	Translation & interpretation																			

Please add additional lines if needed.

Checklist: Communication Tools and Tactics

Project Name:		Project ID#:	
Contact Name:		Phone:	
Email Address:			
Standard Operating Practices (SOP) strategy	Yes/No		
Communications Tools - Check all that apply to this project/phase			
Content	**Material**	**Check**	**Notes**
Communications	Talking Points		
	News Release		
	News Item		
	emails		
Social Media Posts (Paid or Unpaid)	Facebook		
	Instagram		
	Twitter		
	LinkedIn		
	Next Door		
	Social Media Geo-targeting		
Print Materials	A-frame poster		
	Flyers		
	Postcard		
	Brochure		
	Rack Card		
	Yard Signs		
	Bus Placards		
	Surveys		
Events	Public Meetings		
	Ribbon Cutting		
	Webinar		
	Promo Items / Giveaways		
Website Updates	Custom Landing Page		
	Updates to existing content		
	News Item		
	Graphics /Header/Icons		
	Full length (1:00+)		

Checklist: Communication Tools and Tactics

Video	Social Snippet(s) from Full (~0:15-1:00)		
	Social Informer/Call to Action (~0:15-1:00)		
	Ad (0:15/0:30)		
	Presentation (5:00+)		
Rider Messaging	On-bus announcements		
	Rider alerts		
	Flyers @ bus stops/stations		
Paid Advertising	Radio Advertising		
	Digital Advertising		
	Print Advertising		
	Newspaper Advertising		
	Magazine Advertising		
Digital Media	PowerPoint Presentation		
	Public Input Graphic		
	Email Graphic		
Other: Write in	________________________________		
Other: Write in	________________________________		
Other: Write in	________________________________		
Other: Write in	________________________________		
Other: Write in	________________________________		
Comments:			

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Level 3 - Engagement Summary Report (ESR) Outline

Recommend attaching ESR to existing packet as an appendix

Date:
Contact Name:
Email:
Phone:

The Engagement Summary Report is designed to provide an overview of the efforts and activities undertaken to involve the community in your decision-making process. It focuses on what happened and how the input received affected the project's outcome or will be considered in another setting. It is not meant to be the place for performance evaluation, yet the summary reports can be analyzed to help improve processes and procedures, as well as identify what tactics work well in your area and should be continued or enhanced. A three section ESR is recommended, and the checklist or outline is provided below.

Section 1: Project Overview

- Basic project information (so ESR can be saved on its own, can copy and paste from already completed forms)
- Summary of engagement strategy/engagement plan, or insert executive summary, if preferred
- Location of saved documents and additional information (Ex. full engagement plan and strategy documents, checklists, event sign in sheets, survey results download, paper copies or materials, voting records, equity analysis worksheet, geographic boundary map, funding information, scope and schedule, etc.)

Section 2: Engagement Phase(s)

There will always be at least one engagement phase section of the ESR, add additional phase information as needed to match your project's scope.

Phase 1: Title of Phase

- Level 2 strategy form
- Screen shots and photos
- Results of communication and engagement tactics
- Webpage and other analytics
- Demographic profile of participants
- In person event overview
- Equity tactics used and goals performance
- Comment Matrix: Comments received, responses to them and how, if at all, they affected the final deliverable.

(Use this same structure for Phase 2, Phase 3, etc.)

Section 3: Wrap Up/Adoption Notes

- Engagement equity analysis summary and results toward reaching target audience performance goals
- Summarize the adoption process (Ex. Did it pass through committees? When was it officially adopted?)