

# Public Outreach & Engagement Plan

Follow the steps below to create the Public Outreach and Engagement Plan. See the Public Outreach and Engagement Plan [GUIDE](#) for more detailed support on completing each step of the Plan. When you complete the Plan, submit it to the POETS website here: [\[link\]](#) **THIS STEP IS MANDATORY. Keep in mind that your Plan is a public document and may be reviewed by SFMTA leadership and staff, City partners and members of the public.**

## Project Overview

**INSTRUCTIONS:** Create an initial summary of the project scope, purpose, benefits and timeline. Based on an initial understanding of the project, state the anticipated “decision space” – the aspects of the project that the public might be able to influence and those that cannot be changed. Note that this is a very early step in project planning and should be revised based on the subsequent Project Needs Assessment. As a general rule, the Project Overview should fit on one page. Maps or other graphics can be included on the reverse side, but the Project Overview should be a single sheet when printed. [To view the detailed guide to developing your Plan, click here.](#)

### Project Description

[Click here to enter text.](#)

### Project Purpose

[Click here to enter text.](#)

### Project Benefits

[Click here to enter text.](#)

### Project Start and End Dates

[Click here to enter text.](#)

### Decision Constraints (What has already been determined or decided?)

[Click here to enter text.](#)

# Project Needs Assessment

## STAKEHOLDER ANALYSIS

**INSTRUCTIONS:** Use this table to identify stakeholders – those who will be affected by, or interested in, the project. Check the categories of stakeholders who will be affected by the project, list specific individuals and groups, and classify each as either primary, secondary or partner audiences. Note that where boxes are already selected there is a presumption that these categories of stakeholders will be included in most Plans. To the extent possible, classify each group as “primary,” “secondary,” or “partner.” Primary stakeholders are *directly* impacted by the project and must be informed regularly (e.g., residents, merchants). Secondary stakeholders are *indirectly* or *temporarily* impacted by the project (e.g., delivery drivers, commuters, tourists). Partner stakeholders are *influential and interested* within the project area and/or community-at-large (e.g., transit riders, bicycle advocates). Partners can affect awareness and support and may be enlisted to assist with outreach to the primary and secondary audiences and/or to champion the project.

### Stakeholders Who Reside, Work or Travel through the Project Area

| ✓                                   | Category:<br>Type of Stakeholder | Names:<br>Specific Individuals or Groups | Classification<br>:<br>Primary,<br>Secondary, Partner |
|-------------------------------------|----------------------------------|--|---|
| <input checked="" type="checkbox"/> | Residential Area                 | Click here to enter text.                | Choose an item.                                       |
| <input checked="" type="checkbox"/> | Business District                | Click here to enter text.                | Choose an item.                                       |
| <input checked="" type="checkbox"/> | People who drive                 | Click here to enter text.                | Choose an item.                                       |
| <input checked="" type="checkbox"/> | People who walk                  | Click here to enter text.                | Choose an item.                                       |
| <input checked="" type="checkbox"/> | People who ride bicycles         | Click here to enter text.                | Choose an item.                                       |
| <input checked="" type="checkbox"/> | People who ride transit          | Click here to enter text.                | Choose an item.                                       |
| <input type="checkbox"/>            | Other                            | Click here to enter text.                | Choose an item.                                       |



### Community Organizations Located in the Project Area

| <input checked="" type="checkbox"/> | <b>Category:</b><br>Type of Stakeholder | <b>Names:</b><br>Specific Individuals or Groups | <b>Classification</b><br>:<br>Primary,<br>Secondary, Partner |
|-------------------------------------|---|---|--|
| <input checked="" type="checkbox"/> | Neighborhood Organizations              | Click here to enter text.                       | Choose an item.  |
| <input checked="" type="checkbox"/> | Merchant Groups                         | Click here to enter text.                       | Choose an item.  |
| <input checked="" type="checkbox"/> | Community Groups                        | Click here to enter text.                       | Choose an item.  |
| <input type="checkbox"/>            | Interest/Advocacy Groups                | Click here to enter text.                       | Choose an item.  |
| <input type="checkbox"/>            | Faith-Based Groups                      | Click here to enter text.                       | Choose an item.  |
| <input type="checkbox"/>            | Schools                                 | Click here to enter text.                       | Choose an item.  |
| <input type="checkbox"/>            | Senior Centers, Disabled Services       | Click here to enter text.                       | Choose an item.  |
| <input type="checkbox"/>            | Media (local and citywide)              | Click here to enter text.                       | Choose an item.  |
| <input type="checkbox"/>            | Other                                   | Click here to enter text.                       | Choose an item.  |

### Internal Stakeholders and Influencers

| <input checked="" type="checkbox"/> | <b>Category:</b><br>Type of Stakeholder                                | <b>Names:</b><br>Specific Individuals or Groups | <b>Classification</b><br>:<br>Primary,<br>Secondary, Partner |
|-------------------------------------|--|---|--|
| <input checked="" type="checkbox"/> | SFMTA Internal Stakeholders (other projects that intersect with yours) | Click here to enter text.                       | Choose an item.  |
| <input type="checkbox"/>            | SFMTA Board of Directors   | Click here to enter text.                       | Choose an item.  |
| <input type="checkbox"/>            | Local Elected Officials (Supervisory District)                         | Click here to enter text.                       | Choose an item.  |



|                                     |  |                           |                 |
|-------------------------------------|--|---------------------------|-----------------|
| <input type="checkbox"/>            | City Agencies (Public Works, Public Utilities Commission, Planning, Police, etc.)  | Click here to enter text. | Choose an item. |
| <input checked="" type="checkbox"/> | SFMTA Committees (Citizens' Advisory Council, Multimodal Accessibility Advisory Council, Paratransit Coordinating Council) | Click here to enter text. | Choose an item. |
| <input checked="" type="checkbox"/> | Planning/Funding Organizations (County Transportation Authority, Metropolitan Transportation Commission, etc.)             | Click here to enter text. | Choose an item. |
| <input type="checkbox"/>            | State and Federal Elected Officials (Delegation offices)   | Click here to enter text. | Choose an item. |
| <input type="checkbox"/>            | Local schools and district   | Click here to enter text. | Choose an item. |

## IMPACT/INTEREST ANALYSIS

**INSTRUCTIONS:** Think about the ways that the project will affect residents, merchants, those who ride transit, and those who walk and ride bicycles on city streets. List the main impacts anticipated by the project, then answer the questions in the Public Impact and Interest Assessment in the Template. Consider impacts both during construction and after project implementation. The average score combines the anticipated impacts on the community with the anticipated public interest in the project. There is no hard and fast rule for translating the score into a particular plan, but it is an indicator of the public's likely expectations around outreach and engagement. It is intended to serve as a starting point for discussion among the project team in developing the Public Outreach and Engagement Plan.

### Project Impacts

**List the main impacts anticipated from the project (service changes, traffic changes, parking changes, construction, etc.)**

Click here to enter text.



### Public Impact and Interest Assessment

| Assessment Questions   | Very Low | Low | Moderate | High | Very High |
|--|----------|-----|----------|------|-----------|
| 1. What is the anticipated level of technical complexity of the project?   |          |     |          |      |           |
| 2. How significant are the potential impacts to the public?  |          |     |          |      |           |
| 3. What is the anticipated level of interest in the project?   |          |     |          |      |           |
| 4. To what extent will the project affect vulnerable populations (e.g., people with disabilities, seniors, youth, low income or limited-English proficient communities)? |          |     |          |      |           |
| 5. How much participation in this project do you expect the public to want?  |          |     |          |      |           |
| 6. What is the scope of potential public influence on this project?  |          |     |          |      |           |
| 7. How significant are the possible benefits of involving the public?  |          |     |          |      |           |
| 8. How serious are the potential ramifications of not involving the public in this project?  |          |     |          |      |           |
| 9. What level of public participation do you expect elected officials to expect?   |          |     |          |      |           |
| 10. What is the possibility that the media will become interested?   |          |     |          |      |           |
| Total number of checks in column   |          |     |          |      |           |
| Multiply by the column weight to   | X1       | X2  | X3       | X4   | X5        |



|   |  |  |  |  |  |
|---|--|--|--|--|--|
| get the column score  |  |  |  |  |  |
| Enter column score  |  |  |  |  |  |
| <b>TOTAL SCORE: Add all five column scores and divide by 10 to see your average</b> |  |  |  |  |  |

## DECISION SPACE ANALYSIS

**INSTRUCTIONS:** Describe the “decision space” of the project (the scope of potential public influence on the project or decision and the opportunities for public participation). Public participation requires the SFMTA to make a commitment to stakeholders about their involvement in the project. Defining the decision space gives the public clear expectations about their role in the planning and decision-making process. Complete the section below to identify the aspects of the project that the public can potentially influence, and the kind of public input that the project team will seek.

### What aspects of the project can potentially be influenced by public input?

[Click here to enter text.](#)

### What aspects of the project are NOT open to change based on public input, and what are the constraints that limit public influence (financial, legal, legislative, etc.)?

[Click here to enter text.](#)

## Goals and Objectives

**INSTRUCTIONS:** List the goals and objectives of the Public Outreach and Engagement Plan for each phase of the project that the Plan covers. Goals should correspond to the levels of public participation on the Spectrum of Public Participation (Inform, Consult, Involve, Collaborate). Objectives should be measurable indicators of the extent to which the goals are met. Indicate the data sources that will be used to measure progress on the objectives.

| <b>PROJECT PHASE: <a href="#">Click here to enter text.</a></b>   |   |
|---|---|
| <b>GOAL / OBJECTIVE</b>   | <b>DATA SOURCES</b>                       |
| <b>Goal #1</b><br><a href="#">Click here to enter text.</a>       | <a href="#">Click here to enter text.</a> |
| <b>Objective 1.1</b><br><a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |



**Objective 1.2**

Click here to enter text.

**Goal #2**

Click here to enter text.

Click here to enter text.

**Objective 2.1**

Click here to enter text.

Click here to enter text.

**Objective 2.2**

Click here to enter text.

Click here to enter text.

# Key Messages

**INSTRUCTIONS:** List the key messages about the project for general and specific audiences. Be sure to include the purpose and benefits of the project, potential impacts, project timeline, opportunities for public input, and key contacts. Where relevant, indicate the intended purpose of communication in relation to the goals of the Public Outreach and Engagement Plan (to inform, to recruit participants, etc.).

**Messages for General Audience:**

Click here to enter text.

**Specific Audience Messages (Stakeholder: Click here to enter text.)**

Click here to enter text.

**Specific Audience Messages (Stakeholder: Click here to enter text.)**

Click here to enter text.

**Specific Audience Messages (Stakeholder: Click here to enter text.)**

Click here to enter text.

**Specific Audience Messages (Stakeholder: Click here to enter text.)**

Click here to enter text.

# Outreach and Engagement Techniques

**INSTRUCTIONS:** List the outreach and engagement techniques and tools you will use to achieve the goals and objectives you established for the project. Include multi-channel communications tactics, community meetings, and other ways you will reach out to stakeholders given your goals for each project phase. This step is about HOW to inform and engage the public, including details about implementation. This is the appropriate step to plan for language access needs.

**Project Phase:** [Click here to enter text.](#)

**ONGOING** (For communication and relationship-building throughout the phase)

[Click here to enter text.](#)

**DISCRETE** (At specific points to inform, compile feedback or convene people)

[Click here to enter text.](#)

**Project Phase:** [Click here to enter text.](#)

**ONGOING** (For communication and relationship-building throughout the phase)

[Click here to enter text.](#)

**DISCRETE** (At specific points to inform, compile feedback or convene people)

[Click here to enter text.](#)

**Project Phase:** [Click here to enter text.](#)

**ONGOING** (For communication and relationship-building throughout the phase)

[Click here to enter text.](#)

**DISCRETE** (At specific points to inform, compile feedback or convene people)

[Click here to enter text.](#)

# Schedule and Responsibilities

**INSTRUCTIONS:** Create an action plan – a summary of the schedule and responsibilities for public outreach and engagement activities and tasks.

## PUBLIC OUTREACH & ENGAGEMENT ACTION PLAN

| Date | Activities/Tasks | Person(s) Responsible |
|------|------------------|-----------------------|
|------|------------------|-----------------------|



Click here to enter a date.

|                             |                           |                           |
|-----------------------------|---------------------------|---------------------------|
| Click here to enter a date. | Click here to enter text. | Click here to enter text. |
| Click here to enter a date. | Click here to enter text. | Click here to enter text. |
| Click here to enter a date. | Click here to enter text. | Click here to enter text. |
| Click here to enter a date. | Click here to enter text. | Click here to enter text. |
| Click here to enter a date. | Click here to enter text. | Click here to enter text. |

## Budget

**INSTRUCTIONS:** Enter the estimated budget for public outreach and engagement for each project phase that the Public Outreach and Engagement Plan covers. Note: depending on the project, it might be necessary to complete this estimate before other steps in the planning process. If possible, however, the budget will be based on the Needs Assessment and a thorough understanding of the strategy for outreach and engagement. Note that the table below represents a budget summary which should be based on a more detailed estimate of budget line items for each phase.

### PUBLIC OUTREACH & ENGAGEMENT PLAN BUDGET

|  |                           |
|--|---------------------------|
| <b>Project Phase:</b><br>Click here to enter text. | Click here to enter text. |
| <b>Project Phase:</b><br>Click here to enter text. | Click here to enter text. |
| <b>Project Phase:</b><br>Click here to enter text. | Click here to enter text. |
| <b>Project Phase:</b><br>Click here to enter text. | Click here to enter text. |
| <b>TOTAL</b>                                       | Click here to enter text. |

## Plan Review

**INSTRUCTIONS:** Check which of the following people and agencies need to be contacted and informed about your Plan. Which SFMTA projects intersect with yours? What other agencies will you need to work with? Who needs to be kept informed within the City? Indicate in the Notes the nature of the relationship.

| <input checked="" type="checkbox"/> | Target:                                   | Notes:                    |
|-------------------------------------|---|---------------------------|
| <input checked="" type="checkbox"/> | SFMTA Public Relations Officer            | Click here to enter text. |
| <input checked="" type="checkbox"/> | Other SFMTA Projects in your Project Area | Click here to enter text. |
| <input checked="" type="checkbox"/> | District Liaison for your Project Area    | Click here to enter text. |
| <input checked="" type="checkbox"/> | POETS Division Lead                       | Click here to enter text. |
| <input type="checkbox"/>            | Project Management Office                 | Click here to enter text. |
| <input type="checkbox"/>            | Other City Departments                    | Click here to enter text. |
| <input type="checkbox"/>            | Other non-City Agencies                   | Click here to enter text. |

## Plan Evaluation

**INSTRUCTIONS:** At the end of each phase of the project (or every six months, whichever comes first), answer the following questions and submit them to the POETS website here [\[link\]](#), along with any revisions to the Public Outreach and Engagement Plan.

**Project Phase:** Click here to enter text.

**Was the Plan implemented as intended? How did it change?**

Click here to enter text.

**To what extent did the Plan achieve its goals and objectives?**

Click here to enter text.

**What were the main lessons learned during implementation?**

**How would you modify the Plan as the project moves to the next phase?**

[Click here to enter text.](#)

**How did you document public input and how it was considered (if applicable)?**

[Click here to enter text.](#)

## Report Back to Stakeholders

**INSTRUCTIONS:** At the end of each phase of the project, complete the “feedback loop” with stakeholders who were contacted or engaged. Use the Template to provide the key information that will be provided to stakeholders, and to document when, how and to whom it was provided.

**Project Phase:** [Click here to enter text.](#)

**What were the opportunities for public input? (meetings, website, surveys, etc.)**

[Click here to enter text.](#)

**What aspects of the project were open to public input?**

[Click here to enter text.](#)

**What feedback did the project team receive from the public?**

[Click here to enter text.](#)

**How was public feedback considered? (by staff or conveyed to decision makers)**

[Click here to enter text.](#)

**How did public input influence the project during this phase?**

[Click here to enter text.](#)

**What are next steps for the project and opportunities for further public participation?**

[Click here to enter text.](#)



List the stakeholders below who received this report and the method used to provide it.

| Stakeholder               | Method                    | Date                        |
|---------------------------|---------------------------|-----------------------------|
| Click here to enter text. | Click here to enter text. | Click here to enter a date. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. |
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