



## Tips for Engaging Diverse Partners

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*This content was initially created to inform federal staff at the U.S. Department of Health and Human Services. In an effort to increase collaboration and share promising practices, the Office of the Assistant Secretary for Planning and Evaluation has made this tool available for both public and private partners. Potential audiences that may be interested in these materials include, but are not limited to, state and local governments, tribal governments, and other private or non-profit organizations focused on programs and policies relating to health and human services.*

### What is equity?

The consistent and systematic, fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment, such as Black, Latino, and Indigenous and Native American persons, Asian Americans and Pacific Islanders and other persons of colors; members of religious minorities; lesbian, gay, bisexual, transgender, queer, and intersex (LGBTQI+) persons; persons with disabilities; persons who live in rural areas; and persons otherwise adversely affected by persistent poverty or inequality. *Definition adapted from [Executive Order 13985](#).*

### Purpose

Building relationships with external partners that reflect the lived experience of individuals served by your organization can help you understand how best to meet those individuals’ needs and ultimately end disparities. Thoughtful outreach, feedback mechanisms, and engagement are foundational to building long-term, reciprocal relationships with diverse communities.

- ▶ **Diverse partners can include** people with lived experience related to organizational programs and policies, researchers and academics, advocacy and interest groups, community-based organizations, and community leaders.
- ▶ **External partners provide crucial expertise and can serve in a variety of roles**, including as grant reviewers, speakers, advisory committee members, technical experts, and consultants.

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## How should you use this resource?

This resource offers a set of key considerations for identifying potential external partners, conducting outreach to them, and building and sustaining productive relationships with them. It is intended to uplift but not direct strategies for regular, consistent, bidirectional, and meaningful engagement beyond formal and standardized processes for soliciting feedback (e.g., listening sessions, comment forms, etc.).



## What could you think about as you prepare to engage?

Building and sustaining meaningful relationships with a broad range of partners and communities requires thoughtful preparation and reflection. As you prepare, think about the following:

✔ Articulate **why** you want representation of diverse viewpoints and perspectives

### **Consider what diversity and inclusion mean to your organization, and why they are a priority.**

Move beyond simply acknowledging that engaging with diverse community members and partners could surface new ideas and feedback. What problems do you expect increased diversity to help solve? Are you aiming to draw on expertise and perspectives not available among your staff members, within existing partnerships, and through your feedback mechanisms? Do you hope to increase credibility and buy-in for your ultimate decisions or results? Remember that your purpose may evolve, particularly based on the feedback you receive from the partners you engage. Consider, too, the implications of **not** engaging representative partners and communities. In what ways might your organization create or perpetuate inequities if it does not engage diverse, partners on an active, ongoing basis?

### **Specify the dimensions of diversity and inclusion that your organization is seeking.**

As appropriate, consider the breadth of race, ethnicity, income (poverty), geography, sexual orientation and gender identity, and religion. Expand your thinking beyond your typical sectors to identify the perspectives of end users and others who should benefit from your organization's work. Be sure you engage diverse perspectives at a variety of levels—for example, national industry and advocacy groups, implementers (e.g., service providers, contractors, and states), and individuals with lived experience who are the ultimate end users or intended beneficiaries of programs, policies, and research. To begin, it may be useful to assess existing partners to determine which experiences, perspectives, or identities may be missing or needed to advance your goals. Which communities currently face systemic barriers to attaining their optimal health, well-being, and economic goals? The answer will help you develop a targeted identification, outreach, and engagement plan.

✔ Set **realistic expectations** about the resources needed to identify partners, conduct outreach, and build long-term relationships

**Seek out staff expertise and build staff capacity.** Successful engagement of diverse partners requires staff members to have the capability to reflect critically on contexts, positional power, attitudes, and biases. It is essential to understand how an individual's experience might affect the way a staff member approaches relationship building. It is important to recognize that self-reflection and the engagement of communities that may be experiencing hardships can impose an emotional burden on staff members, particularly if they have faced similar experiences. Consider how to support staff in the work of engagement, such as through employee assistance programs.

**Consider the representativeness of your team.** If your team does not reflect the communities you seek to engage with, consider why, and think about ways to address issues of representation. At a minimum, transparency about your team's diversity with respect to perspectives and experiences or lack thereof can prevent tokenization of team members who might come from the same communities as potential partners. It can also prevent partners from developing false perceptions about your organization.

**Start early, and build in plenty of time.** Organization processes, timelines, and staff capacity can sometimes drive engagement efforts. However, waiting until specific needs arise to begin outreach can undermine both equity efforts and results by prioritizing the connections that are easiest or fastest to make, rather than the ones that may be most mutually beneficial. In addition, attempts to forge new relationships based on a specific task request can be uninviting. If you find yourself in such a situation, be straightforward about it in your outreach. As you allocate time for engagement, remember that building long-term relationships requires ongoing trust building; moreover, relationship building is often not linear. How might you allow potential partners to set the pace and cadence of relationship building? How can you flexibly accommodate various cultures' concepts of time?

**Provide support for potential external partners.** Effective engagement is a learned skill that requires support. Potential partners are likely unfamiliar with the processes and structures that your organization typically uses and, like your staff, may feel burdened by engagement in various forms. Consider the possible funds and other infrastructure that can support partners before you reach out. Examples could include:

- ▶ Compensation for their time and effort to engage, along with other tangible tokens of appreciation as preferred by partners and as permitted through available and allowable mechanisms, such as contracts and grants
- ▶ Training or other capacity-building resources to help external partners engage effectively and provide actionable input
- ▶ Accessibility accommodations
- ▶ Mental health support to work with topics that might reactivate trauma

It is also important to allow partners to describe the type and nature of support most beneficial to them. Well before you fully enter into any partnership, be certain about your ability to provide various types of support, and understand any limitations on that support (e.g., avoiding unfair competitive advantage) before you engage. Such an approach will help manage expectations on both sides of the relationship.

**Demonstrate that your organization values feedback from partners.** You should determine how to acknowledge and respond to feedback received from partners. You could, for example, develop plans to provide credit for or visibility to partners' contributions. You can also consider the type of changes your organization could make in response to partner input, and how you will communicate those changes to a potential partner.

## Understand **context**—including barriers—and the benefits of engagement for external partners

**Once you have identified potential external partners to engage with, gather some initial information on context.** Each potential partner has unique histories, values, beliefs, strengths, and priorities. Consider how various aspects of context intersect to understand what may affect potential partners' ability and willingness to engage. Consider, too, how to tailor your relationship-building efforts to each partner's unique context. Use contextual information to ensure the engagement will not cause unintended harm to the individuals. For example, it may be inappropriate to ask for input from individuals who are actively experiencing major crises.

An understanding of context is useful, but it **should not create assumptions** about how individual people will respond to either outreach or engagement requests.

**Identify how partners will benefit from engaging with your organization.** Consideration of the benefits for partners will help ensure relationships are reciprocal rather than transactional or extractive. How might an engagement return power to partners, program participants, and their communities, or work to address the barriers or disparities they may face? How might a partnership lead to deeper relationships that advance your partner's goals?

### **Identify the potential barriers which may limit engagement.**

Barriers to engagement may include:<sup>2</sup>

- ▶ **Systemic barriers** such as accumulated disparities, harm, or trauma caused by overlapping inequities (e.g., racism, sexism, ableism, homophobia, transphobia, or generational poverty) in systems or structures, any of which can cause a lack of awareness of or compromise trust in engagement
- ▶ **Procedural barriers** such as lack of accessibility (e.g., for people with primary languages other than English, people with disabilities, or people without Internet access) or long, overly complex, or rigid processes for expressing interest that can cause otherwise-interested partners to find engagement burdensome.

**Focus initial relationship building on deepening your organization's understanding of various contexts.** To promote a partnership's longevity, it is often beneficial to initiate formal or informal discussions or listening sessions with potential partners rather than trying to develop a formal partnership from the outset. It might be helpful to explore the potential partner's current work and inquire about supporting it. Finally, it might also be useful to determine if any of your current partners (see upcoming section, **existing relationships**) have more knowledge or experience working with potential partners and could leverage this knowledge and experience to assist in your engagement and outreach efforts.

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<sup>2</sup> Other tools providing more information on barriers to engagement specifically for people with lived experience outside of your organization, as well as strategies to overcome those barriers, are available on the ASPE website: <https://aspe.hhs.gov/lived-experience>.



## How can you plan for outreach?

Once your organization has laid the foundations for a productive engagement, you can start to develop and implement an outreach plan. Refer to the purpose and benefits of the engagement outlined by your organization. Make them the foundation of your outreach plan—focusing both on what your organization hopes to learn and how the potential partner might benefit. The following steps may be completed simultaneously:

✓ Create a **flexible process** for expressing interest and engaging in the request for partnership

**Be flexible about the mechanisms of engagement**, both for expressing interest in the engagement and participating in the engagement itself. To solicit interest, develop as many options as possible, such as providing written feedback (e.g., email replies or online forms), holding conversations (e.g., phone calls or texts, in-person discussions, and individual or group conversations), or using social media, and make them all available in accessible formats.

**Be transparent about any constraints** (such as time, budget, or a formally defined policy or programmatic process) as part of the request for engagement. Be clear and realistic about the type of influence and impact that potential partners can have by engaging with your organization, and whether the engagement could prohibit them from applying for future opportunities, such as funding, with your organization.

✓ Leverage **existing relationships** for referrals and outreach strategies

Engaging the same partners repeatedly could exacerbate inequities by placing an undue burden on specific communities or people while never obtaining input from others with critical perspectives. However, consulting current partners as a starting place can broaden your organization's referrals and strategies and be a productive way to create and implement an outreach plan.

**Engage your organization's existing internal partners.** Gather referrals and strategies from existing partnerships, offering the same transparency and flexibility you promise to potential new partners. Possible sources for existing partners could include:

- ▶ Past or current program participants
- ▶ Partner organizations such as grant recipients
- ▶ Past panelists, speakers, or reviewers
- ▶ Applicant lists or event registrations
- ▶ Staff members' personal relationships (if willing and appropriate)

Organizations should consider recommendations made by existing partners, particularly **guidance offered by people with lived experience**.

This engagement could take the form of requests to current partners to make personal introductions or referrals, recommend specific outreach strategies, share potential contacts, or broadcast the opportunity within their networks. In some cases, you may want to ask existing partners to disseminate collateral materials or messaging on your behalf (see upcoming section, [develop messaging and materials](#)).

Consider involving a **trusted contact** experienced in working with potential communities to conduct outreach on your behalf. Before requesting relationships to be built on your organization's behalf,

though, think about your organization’s ability to sustain those relationships (see upcoming section, [sustain relationships](#)).

### Develop **messaging and materials** and identify possible **outreach strategies**

Use plain, inclusive language and accessible formatting in materials; consider co-creating materials with existing partners. **Plain language** involves knowing your potential audience, avoiding jargon and technical language, and maintaining a conversational tone. **Inclusive language** ensures messaging is accessible, culturally and linguistically appropriate and respectful, and welcoming to all, and that it builds trust. Often, it is advisable to use person-first language.<sup>3</sup> **Accessible formatting** avoids large blocks of text and aids readers’ comprehension through the use of bullet points, headers, and white space; it is also 508 compliant.<sup>4</sup>

Identify possible **outreach strategies**. In addition to the strategies suggested by your current partners, other strategies might include both personalized and broad email outreach, use of social media (including posts on others’ accounts), offers to speak at regularly scheduled gatherings (e.g., community, council, or board meetings), or printed materials. Tailor your outreach strategies to your contact list.

### Create a **contact list**, and **reach out**

A contact list can help you organize your outreach efforts. In addition to relying on the referrals identified by existing partners, consider contacting organizations that serve communities or people your organization has prioritized. Examples could include faith- and community-based organizations, Minority Serving Institutions (e.g., Historically Black Colleges and Universities and Hispanic Serving Institutions), philanthropic organizations, grassroots organizations, and professional associations.

When reaching out to potential partners, organizations can consider **how context may affect institutions as well as individuals**. How will your outreach efforts be responsive to context?

When reaching out, determine the best person or persons to conduct the initial outreach. For example, is it more appropriate for the organization director to initiate contact, or should a dedicated staff person initiate contact?



## How should you sustain relationships with external partners?

How will your organization continue to ensure that any relationships that are being built will benefit both you and the partner? As you develop and execute your outreach plan, consider possible strategies for sustaining those relationships, including the following.

<sup>3</sup> The Centers for Disease Control and Prevention’s [Health Equity Guiding Principles for Inclusive Communication](#) and [Global Public Health Equity Guiding Principles for Communication](#) offer principles, resources, and specific suggestions on topics to inform an inclusive approach to communications. An additional tool offering tips on equitable communication in a policy context is available at <https://aspe.hhs.gov/lived-experience>.

<sup>4</sup> For more guidance on plain language, inclusive language, and accessible formatting, see [plainlanguage.gov](https://plainlanguage.gov) and [the 18F content guide](#).



### Maintain **regular check-ins** on a mutually agreed-upon schedule

Once contact has been made, develop a plan to check in regularly with the partner on a schedule that makes the most sense for both of you. Goals of check-ins could include:

- ▶ Learning what's important to the partner, the communities they represent, or the organization(s) they work with, while also sharing what is important to you and your organization
- ▶ Providing updates since the last check-in
- ▶ Discussing overlapping values and efforts to identify opportunities to partner more formally
- ▶ Creating a relationship in which partners feel comfortable reaching out on their own

### Express **gratitude**, and acknowledge **contributions**

In addition to offering appropriate and timely compensation for their expertise and efforts in all engagements through a statutorily available mechanism, consider how to express gratitude to partners as you engage. Examples could include handwritten thank-you notes, public acknowledgment at events or in written materials, or follow-up phone calls. Ask how they prefer gratitude to be expressed and how they would like to be acknowledged; adapt your organization's practices accordingly.

### For specific requests: Follow up to **share outcomes**

When partners opt to engage with your organization through a specific request, plan to follow up about the outcomes arising from their input and participation. You could, for example, prepare and share a written update about the outcomes. Or you might share a final written product informed by their feedback. In either example, you could offer partners the opportunity to provide feedback, discuss the products, and ask questions. Any follow-up should offer an opportunity for partners to advance their goals.

### Prepare a **mitigation strategy** for times when outreach doesn't go as planned

Allow for an honest appraisal of the relationship. If trust has been broken with the partner or their communities, acknowledge the problem, and have a conversation about how to address the matter to ensure the partnership remains intact.

### Continue to **review and update** the list of partners you engage

Once you have developed a list of a diverse group of partners to engage, set up a regular schedule for reviewing it, identifying potential gaps, and updating the list. It is easy to reach out continually to established partners but relying on long-time contacts might exclude new perspectives particularly relevant for your organization's current priorities.