Identify Project Roles and Community Connections

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Successful community engagement begins with knowing who should be involved, what role each person or group has, and how to connect with people affected by the project.

These two worksheets help municipal officials and volunteers organize that information:

- The **Project Roles Worksheet** identifies decision-makers, staff, partners, advisers, funders, regulators, property owners, and affected groups. It helps clarify responsibilities and find missing roles.
- The **Community Connections Map Worksheet** identifies community audiences, trusted messengers, participation barriers, communication methods, and outreach gaps.

Some people and groups may appear in both worksheets. That is expected. The Roles Worksheet helps organize the project team and formal relationships. The Connections Map helps the municipality reach and hear from the broader community.

Municipalities may adapt the worksheets to fit their project. Complete only the sections that are useful.

Download the resources

Project Roles Worksheet

Use this worksheet to identify project parties, clarify responsibilities, and find missing roles.

Community Connections Map Worksheet

Use this worksheet to identify community audiences, trusted connections, participation barriers, and outreach needs.

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Guidance for using the resources

When should we use these worksheets?

Begin using the worksheets while the municipality is exploring a need or project idea. Review them before major decisions, public outreach, funding applications, agreements, or construction.

Update them when the project changes or new people become involved. A small project may need only a few entries. A larger project may require more detail.

Who should complete them?

A small group of municipal officials, staff, volunteers, or project committee members can prepare the first draft. Choose people who understand the project and the community.

Ask others to review the draft for missing parties, unclear responsibilities, or community groups that may have been overlooked.

How do we use the Project Roles Worksheet?

Start by listing people and organizations that:

- Make or approve decisions
- Manage or perform project work
- Provide legal, financial, or technical advice
- Provide funding or regulatory approval

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- Own or control affected property
- Will operate or maintain the completed project
- May experience project costs, benefits, or disruptions

Record each party's role, when they should be involved, and who will serve as the municipal contact. Look for missing expertise, unclear authority, duplicated responsibilities, and work that has not been assigned.

The worksheet helps organize roles, but it does not establish legal authority. Use resolutions, contracts, policies, committee charges, or agreements when responsibilities must be formally assigned.

How do we use the Community Connections Map Worksheet?

List the groups that may be affected by the project or have information the municipality needs. Consider people who do not usually attend municipal meetings or use the municipality's usual communication channels.

For each audience, consider:

- How the project may affect them
- What they need to know
- What the municipality needs to learn from them
- What may make participation difficult
- Where they get information
- Who they trust

Trusted messengers may help the municipality listen, invite participation, and connect residents with official information. Their role is not to persuade people to support the project. Ask permission before identifying someone as a trusted messenger, and do

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not assume that one person speaks for an entire group.

What should we do with the results?

Use the completed worksheets to:

- Assign project and communication responsibilities
- Identify missing partners or expertise
- Decide which audiences need direct outreach
- Select communication methods that fit the community
- Prepare fact sheets, meetings, surveys, and other outreach
- Track follow-up
- Update project information when circumstances change

Keep the process manageable. Focus first on the people most affected, the decisions coming next, and the gaps that could delay the project or leave part of the community out.

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