Collecting and Making Sense of Community Engagement Data

This document is intended for state and local education agency staff who collect or work with community engagement data and outlines a three-phase process for effective and meaningful engagements: **Before**, **During**, and **After** community engagement. Each phase includes crucial steps to ensure effective and meaningful interactions with the community.

The following pages provide a breakdown of each phase and helpful resources along the way.

Where to start**

Those starting from scratch should begin with Phase 1.
Those needing tools for conducting planned community engagement should begin with Phase 2.
Those who already have qualitative data in hand should begin with Phase 3.

Phase 1

- ◻ Define engagement objectives
- ◻ Develop engagement questions
- ◻ Determine type of engagement
- ◻ Create and pilot engagement materials

Phase 2

- ◻ Determine recording strategy
- ◻ Use standardized protocols and notetaking templates

Phase 3

- ◻ Prepare data for analysis
- ◻ Familiarize yourself with the data
- ◻ Create an initial codebook
- ◻ Code and analyze data
- ◻ Identify and validate themes
- ◻ Share findings

** *Important Note: While the resources are designed to be used flexibly, the foundational steps in Phase 1 set the stage for meaningful and successful community engagement in the later phases. Ensure that content in each phase has been covered for engagement efforts to be intentional, focused, and effective.*

Phase 1: Before community engagement

This initial phase focuses on laying the groundwork for successful engagement. Careful planning and preparation are essential to ensure that engagement activities are targeted, effective, and respectful of the community's needs and expectations.

Define engagement objectives

Define what you hope to learn through community engagement.

Considerations

- What topic creates the need for engagement?
- Why is this an important topic?
- What is known about the topic?
- For whom is this topic relevant?
- How will you share what you learn with the community?

Develop engagement questions

Develop community engagement questions that are aligned with the purpose of community engagement sessions, answerable, actionable, and specific.

Resources

- Evaluating Alignment Between Community Engagement Purpose and Session Questions
- Prioritizing Community Engagement Session Questions

Determine type of engagement

Decide on the type of community engagement (e.g., interviews, focus groups, surveys, town halls, or a mix of different methods). Recruit the right people to answer the question. Identify trusted individuals or organizations to help recruit for engagement.

Resources

- Interview, Focus Group, Observation, or Survey?

Create and pilot engagement materials

Create accessible, culturally responsive materials; pilot materials with a small group; and adjust as needed.

Resources

- Guidelines for Interviews and Focus Groups
- Guidelines for Observations

DURING

Phase 2: During community engagement

This phase involves actively engaging with the community through various activities and channels. The focus is on creating opportunities for dialogue, gathering feedback, and fostering a sense of shared ownership.

Determine recording strategy

Decide whether it makes sense to audio record the community engagement session or just take written notes.

Resources

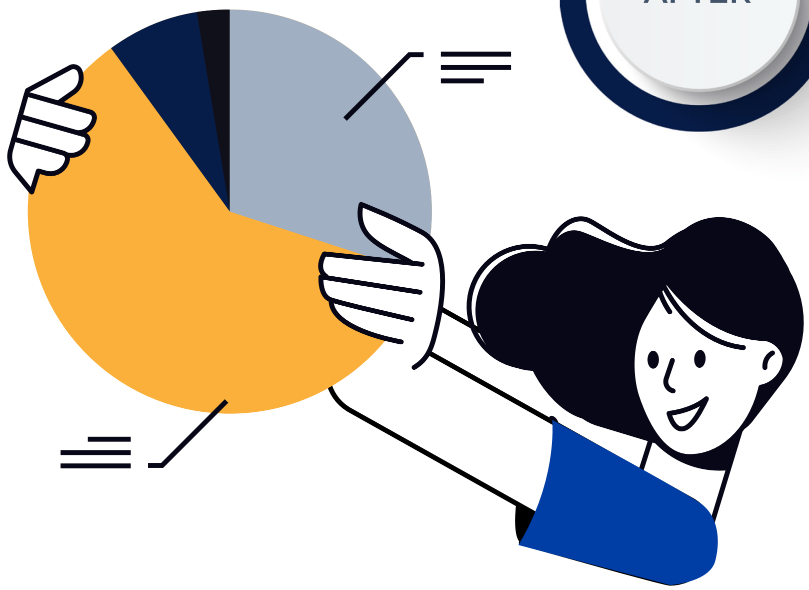
- Tips for Recording Community Engagement Sessions

Use standardized protocols and notetaking templates

Use standardized templates and formats so all notes and transcripts are uniform, aiding comparison and analysis.

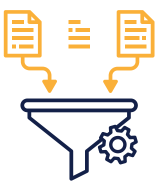
Resources

- Tips and Tools for Facilitating Community Engagement Sessions
- Tips and Tools for Taking Notes During Community Engagement Sessions



Phase 3: After community engagement

This final phase focuses on analyzing the feedback received, implementing changes based on that feedback, and reporting back to the community on the outcomes of the engagement process.



Prepare data for analysis

Keep data in encrypted or password-protected locations with restricted access. Remove personally identifiable information to protect privacy while supporting analysis.

Resources

- Tips for Transcribing Community Engagement Session Data
- Tips for Anonymizing Community Engagement Session Data

Familiarize yourself with the data

Read all transcripts and notes, taking notes in the margins about both codes you did expect and did not expect. Individually or as a team, determine and highlight which passages directly address your research question.

Create an initial codebook

Create a list of codes, each with a clear name. Individually or as a team, review your codes, looking for overlaps or redundancies that can be consolidated. Document your codes in a codebook, describing each code's meaning and application.

Resources

- Generating a Codebook for Analyzing Community Engagement Session Data

Code and analyze the data

Use your codebook to code notes and transcripts, either using an Excel template or qualitative coding software. Add, remove, or revise codes as new ones emerge, updating your previously coded data whenever you alter your codebook.

Resources

- Using Excel for Coding and Analyzing Community Engagement Session Data

Identify and validate themes

Take note of codes that appear together and codes that are unique to specific respondents (e.g., from a particular focus group). Check with other coders and relevant stakeholders to see if the themes you identify and take away from the data are accurate, complete, and culturally informed.

Resources

- Tips for Generating Themes from Community Engagement Session Data

Share findings

With the initial research question in mind, create tailored messages and dissemination strategies for different audiences, depending on who needs to hear these findings and the best way and time to share these findings with them.

Resources

- Disseminating Community Engagement Session Findings
- Dissemination Approaches: Pros and Cons
- Tips and Tools for Visualizing Community Engagement Session Data

Develop engagement questions

Evaluating Alignment Between Community Engagement Purpose and Session Questions

This handout provides a guide for evaluating community engagement session questions about educational programs or policies and making sure they align to the purpose of the sessions. After drafting initial session questions, assess the quality of each question using the elements below.

Community engagement session research question

Key element	Assessing each community engagement session question	Yes	No	Notes
Pertinent	Is this community engagement session question meaningful to participants and stakeholders?			
Answerable	Can the community engagement session question be answered using available and attainable data?			
Reasonable	Does the community engagement session question link to what the agency can practically and realistically achieve or influence?			
Specific	Is the community engagement session question clearly worded and does it avoid broad generalizations?			
Evaluative	Will the community engagement session question produce actionable answers and inform next steps?			
Complete	Are there any other community engagement session questions that should be asked to address the areas of interest?			

Adapted from Stewart, J., Joyce, J., Haines, M., Yanoski, D., Gagnon, D., Luke, K., Rhoads, C., & Germeroth, C. (2021). *Program evaluation toolkit*. U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory Central. https://ies.ed.gov/use-work/resource-library/resource/tooltoolkit/program-evaluation-toolkit

Develop engagement questions

Prioritizing Community Engagement Session Questions

The purpose of this handout is to prioritize community engagement session questions. List your community engagement session questions in the first column. Consider each question in terms of its importance and urgency. Rate the importance of the question from 1 to 5, with 1 being low and 5 being high importance. Then do the same for urgency, prioritizing each question based on the following: ***high priority*** = *high importance and urgency;* ***low priority*** = *low importance and urgency;* ***medium priority*** = *between high and low importance and urgency.*

Community engagement session questions	Importance	Urgency

Adapted from Stewart, J., Joyce, J., Haines, M., Yanoski, D., Gagnon, D., Luke, K., Rhoads, C., & Germeroth, C. (2021). *Program evaluation toolkit*. U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory Central. https://ies.ed.gov/use-work/resource-library/resource/tooltoolkit/program-evaluation-toolkit

Determine recording strategy

Tips for Recording Community Engagement Sessions

Recording sessions can capture participants' exact words and preserve important details, supporting accurate analysis. Virtual sessions are easily recorded, while in-person gatherings may use audio, video, or live-streaming. If you choose to record community engagement sessions, be sure to:

Tip	Guidance	Example language
Gather consent and offer alternatives for opting out of being recorded.	Clearly explain why you are recording and let participants know they can leave at any time. Consider offering to switch to written notetaking if anyone prefers not to be recorded.	"We are recording to make sure we collect your feedback accurately and completely. Quotes from this session may be used when sharing findings, but we will not use your name or share personal information. Please tell us out loud if you are okay with being recorded or if you do not want to be recorded. You can choose not to participate at any time, and that will not cause any problems for you."
Communicate data protections.	Explain measures like anonymization, secure storage, data deletion after the project, and password-protected meetings to prevent unwanted attendees.	"Any audio we collect will be carefully protected, name and personal information removed, and files securely stored. After the project is finished, the recordings will be deleted for good."
Set disclosure norms.	Tell participants that privacy and confidentiality are expected, even though you cannot fully prevent other participants from sharing information outside the session.	"We kindly ask that you do not discuss anything that is shared within this group after you leave. By following this rule, the group can help make sure that everyone feels safe in sharing their thoughts and experiences."
Use a detailed notetaking protocol.	Capture key points and nuance through comprehensive written notes. Refer to notetaking guidance and templates for support.	"In addition to audio recording, we will be writing down important points people say during this session."

Use standardized protocols and notetaking template

Tips and Tools for Facilitating Community Engagement Sessions

This protocol is intended for use with your community engagement session. The first page includes information about the role of the facilitator and some tips for facilitating. The remaining pages provide a sample protocol and notetaking sheet that can be tailored to your community engagement session.

Role of the facilitator

As the facilitator, your primary responsibility is to create a welcoming and positive environment that encourages open and thoughtful discussion. Your aim is to invite a diversity of perspectives and even disagreement or debate, since these can enrich the conversation and yield valuable insights. While consensus may naturally occur on some topics, ensure that every participant feels represented and heard by encouraging all to share their views. Guide the conversation, use probing questions (see Text Box 1), keep the group focused, and move the discussion forward, minimizing your own input as much as possible.

Text Box 1. Probing questions

Probing questions are essential tools for deepening dialogue and clarifying perspectives. Examples include:

- "Could you say more about ___?"
- "I want to make sure I understand. Are you saying ___?"
- "Can you elaborate on that?"
- "You mentioned ___. Can you expand?"
- "Does anyone else have an example to share?"

Facilitation tips

To create a welcoming and positive environment, be friendly and approachable, smile and make eye contact with participants, use a pleasant tone and relaxed body language, use humor appropriately, and be patient. When asking questions, allow 10-15 seconds for responses. Silent pauses create space for thoughtful answers. If there is no response, try rephrasing or clarifying.

To promote open and thoughtful participation, set ground rules at the outset, invite everyone to contribute, use pauses and probing questions, encourage participants to build on each other's ideas, link ideas when appropriate, and avoid judging comments.

Sample Protocol and Notetaker

This structured facilitation protocol and notetaker guides community engagement sessions from introduction through closing and helps teams capture participant input clearly and consistently so insights can be analyzed and used to inform decisions.

Session information

Date and time: ______________________________________

Facilitator(s): ______________________________________

Notetaker(s): ______________________________________

Group participants

Name	Organization, role	Notes:

Introduction (5 minutes)

Hello, and thank you all for joining us today. We would like to take some time to learn more about [____].
We are particularly interested in [____].
Insights from this community engagement session will be used to [______________________________
____].
The community engagement session will last approximately [____] minutes.

We will begin by reviewing meeting norms and participating in an engagement activity, after which we will dive into our community engagement session questions. If you have questions at any time, please do not hesitate to ask.

Meeting norms

For our community engagement session to run smoothly, we ask that you:

- Place all electronics in vibrate mode and refrain from texting.
- Respectfully participate, listen, and contribute to the conversation.
- Share what is important to you but stay focused on the topic.
- (If setting is virtual) Turn your camera on, if you feel comfortable.
- (If setting is virtual) Come off mute when you want to contribute.

One member of the research team will serve as the facilitator and timekeeper, while another member of the research team will serve as the notetaker. You may leave or discontinue the community engagement session at any time.

Engagement activity (icebreaker)

Before we begin, let's spend a few moments getting to know one another.
[Insert an engagement prompt here requiring a brief response, depending on the size of the group. This can be as simple as asking people for their name and where they are joining the session from. This can also include a question that can be related to the topic of discussion or off topic. One example is "If you were a kitchen tool, what would you be and why?"]

- For small groups (≤6): Invite round-robin sharing.
- For larger groups (7+): Collect responses in the chat or notetaking document.

Questions

Section 1: Topic :	**____ (__ minutes)**
Facilitator instructions. [Insert facilitator instructions here.]	
Question	Notes
Q1:	
Q2:	
Q3:	

Closing (_____ minutes)

Thank you for your input. Before we close, is there anything else you would like us to know?

Thank you again for your valuable input. As a reminder, our next step is to analyze this data and use it, as possible, to [____].

Finalizing data collection

- Add any additional comments within 24 hours after the meeting.
- (For virtual settings) Paste the chat log at the end of the notetaking document.
- Review and synthesize key takeaways as a group.

Use standardized protocols and notetaking template

Tips and Tools for Taking Notes during Community Engagement Sessions

This protocol is intended for use with your community engagement session. The first page includes information about the role of the notetaker and some tips for notetaking. The remaining pages provide a notetaking sheet that can be tailored to your community engagement session.

Role of the notetaker

As a notetaker, you will use a structured template to capture key moments and observations during the community engagement session. Your role is to serve as a second set of eyes and ears to identify important details the facilitator may miss while leading the session. You may also be asked to help keep time to ensure all questions are addressed. Each section of the protocol will include suggested times to assist with timekeeping.

Notetaking tips

Recording responses

Whenever possible, document participants' statements in their own words. This ensures accuracy during analysis and provides direct quotes for reporting. If appropriate, and with participants' consent, consider audio recording the session. You can then reference the recording to fill in any gaps in your notes or create a transcript.

Contextual notes

In addition to capturing what is said, take note of contextual details such as participant demographics (e.g., number present, roles), group dynamics (e.g., if someone dominates the conversation), or notable reactions (e.g., tension around certain topics). Both spoken and unspoken observations are important for qualitative analysis.

Post-session review

Within 24 hours after the session, review and clarify your notes, expanding any abbreviations or shorthand so they can be easily understood by others. Upload the finalized notes to a secure storage location for analysis.

Sample Notetaker

Session information

Date and time: ____

Facilitator(s): ____

Notetaker(s): ____

Group participants

Name	Organization, role	Notes:

Questions

Section 1: *Topic:* (__ minutes)	
Facilitator instructions:	
Question	Notes
Q1:	
Q2:	
Q3:	

Finalizing data collection

- Add any additional comments within 24 hours after the meeting.
- (If setting is virtual) Paste the chat log at the end of the notetaking document.
- Review and synthesize key takeaways as a group.

Prepare data for analysis

Tips for Transcribing Community Engagement Session Data

If you have an audio or audiovisual recording of a community engagement session, you may consider transcribing it into a written transcript so it can be systematically analyzed.

Prior to transcription

Prior to transcription, you should make key decisions about whether and how the audio or audiovisual recordings will be transcribed. Use the table below to guide your decisionmaking process.

Question	Guidance
Do the data need transcribing?	Even when an audio or audiovisual recording exists, detailed notes taken during the community engagement session may suffice.
How will data be transcribed?	Consider whether you will use transcription software, hire a transcription company, or transcribe the recording by hand.
How complete must the transcript be?	Consider whether all audio versus relevant segments should be transcribed.
How do we ensure content accuracy?	Consider providing transcribers with a list of frequently used terms.
Will we need multilingual transcription or translation?	Consider whether transcriptions will need to be translated into another language.

After transcription

After transcription, there are several decisions that still need to be made. Use the table below to guide your decisionmaking process when preparing transcripts for analysis.

Question	Guidance
How are your transcripts formatted?	Ensure each transcript has standardized fonts and font size, margins, and page numbers.
How will you anonymize your transcripts?	Remove individuals' names and other personally identifiable information, as well as references to organizations or groups.
How will you ensure the transcription reflects the audio?	Read each transcript while listening to audio and rectify errors or omissions that emerge. If a transcript is translated into English, have a multilingual teammate verify the accuracy and completeness of the translated transcript.

Prepare data for analysis

Tips for Anonymizing Community Engagement Session Data

Sometimes community members share personal information about themselves during community engagement sessions or when responding to open-ended survey questions. One important step for protecting participants' personal information is through anonymization, removing information that could be used to identify someone. Below are steps you can take to anonymize your data.

Step 1: Find and redact direct identifiers in your data

Direct identifiers are ones like the participant's name, address, or telephone numbers that specifically identify them. These should always be redacted from the data.

Step 2: Find, highlight, and consider the indirect identifiers in your data

Indirect identifiers are ones that, if placed with other information, could reveal an individual (e.g., by cross-referencing occupation, salary, age, and location). Consider which indirect identifiers are essential for understanding the data and which ones to leave out.

Step 3: Create and consistently use an anonymization log

An anonymization log is a table of original name, pseudonyms, and relevant demographics. This table should be stored separately from the anonymized data files. Ensure that the coding team use pseudonyms or replacements consistently.

Step 4: Avoid over- or under-anonymizing your data

Avoid over- or under-anonymization to mitigate disclosure while maintaining data utility and value. As an example, see how the following passage was anonymized to avoid over or under anonymization, while still providing enough context for analysis.

Original response

I first started teaching at Lincoln Middle School, which is about 10 minutes from my apartment in downtown Springfield. My closest colleagues were Ms. Carter and Ms. Nguyen, and I still work with Ms. Nguyen on the district's literacy committee. She lives in Oakwood neighborhood with her partner David and their daughter Isabelle.

Anonymized response

I first started teaching at [a local middle school], which is about 10 minutes from my apartment in [a city in the Midwest]. My closest colleagues were [Colleague 1] and [Colleague 2], and I still work with [Colleague 2] on the district's literacy committee. She lives in [a nearby neighborhood] with her partner and their daughter.

Create an initial codebook

Generating a Codebook for Analyzing Community Engagement Session Data

Codebooks list and describe each code used in your analysis, featuring clear definitions and examples of each code so coding team members have a reference when coding subsequent transcripts. Use the following codebook template to start your own codebook.

Code	Code group	Definition/description	Notes	Example quote

Identify and validate themes

Tips for Generating Themes from Community Engagement Data

Themes are meaningful patterns that may emerge from your coded data. The following steps can help you generate, refine, and interpret themes.

Step 1: Group your codes to create an initial set of themes

After coding data, organize codes into meaningful clusters. This could be done using a graphic organizer or data filters within qualitative coding software or with another research template. Grouping helps you see which codes tend to appear together and whether the grouping represents a distinct or significant theme.

Step 2: Refine, collapse, expand, and interrogate your themes

After developing an initial list of themes, determine whether the list represents the variety of participants' thoughts and experiences from the data and whether any themes should be added or removed. Some questions you can ask include:

- Is there enough data to support this theme?
- Can any themes be combined?
- Do any themes seem too broad and need to be broken into separate themes?
- How do the themes fit together?
- Are there any themes missing?

Step 3: Develop a definition for each theme

Consider how each theme relates to your research questions. This goes beyond just paraphrasing the data and identifying what is interesting from themes and why. Themes should have concise titles and be describable in a few sentences.

Step 4: Write up findings

Provide a concise, coherent, and interesting account of the story the data tell, within and across themes. Provide evidence of these themes with illustrative quotes while providing a narrative that tells the larger story. Relate your narrative back to the research questions, highlighting any assumptions made, relevant data limitations, and implications of the findings.

Step 5: Validate your narrative

Always share findings with the community representatives who contributed. If possible, have them review and provide feedback on your interpretations to ensure the narrative accurately reflects what was expressed during the engagement session. Partners should feel their contributions are truly represented.

Phase 3: Identify and validate themes

Disseminating Community Engagement Session Findings

Use the following guiding questions and table to complete a draft dissemination plan. A dissemination plan might include multiple products with different messages (or different versions of the same information) for different audiences. Use one row for each dissemination product you are planning.

Audience Who needs this information?	**Message** What does the audience need to know?	**Approach** Which dissemination approach fits your needs?	**Timing** When will dissemination begin and end?	**Responsible party** Who will lead the dissemination effort?

Adapted from Regional Educational Laboratory Central. (n.d.). *Dissemination plan template*. U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics. https://ies.ed.gov/rel-central/2025/01/dissemination-plan-template

Identify and validate themes

Tips and Tools for Visualizing Community Engagement Data

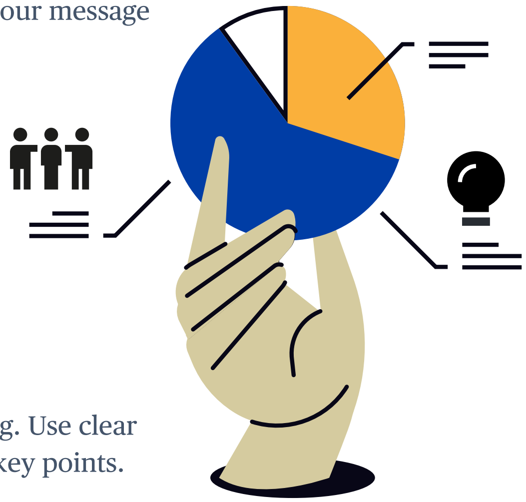
Data visualization can provide meaningful, visual information about findings, tailored for specific audiences. The guidance below offers considerations for visualizing findings from community engagement data and provides example visualizations along with some tools you can use to create them.

Use consistent visualizations over time

Consistency helps audiences interpret information. Maintain consistency in your data visualizations by using uniform branding such as fonts, colors, and style. Ensure colors and fonts are easy to read and reproduce, use plain language with minimal jargon, and adhere to federal Section 508 accessibility guidelines.

Focus on the core message

Highlight the main takeaway for your audience and avoid cluttered graphics. Display only essential information. Solicit feedback to confirm your message is clear and adjust visuals as needed.



Provide all necessary information

Include meaningful titles, data values, definitions, and sources so viewers can fully understand your graphics. Present this information carefully to provide clarity but avoid distraction.

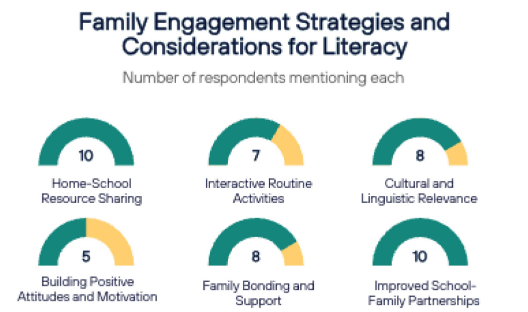
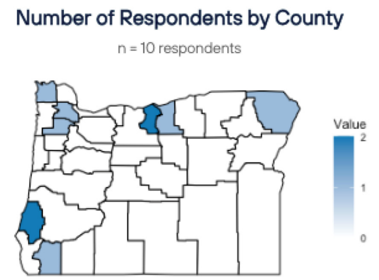
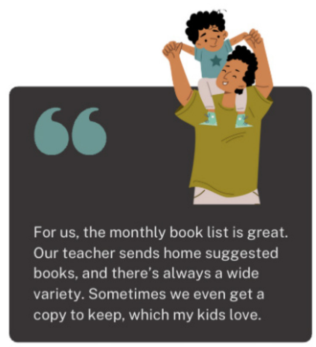
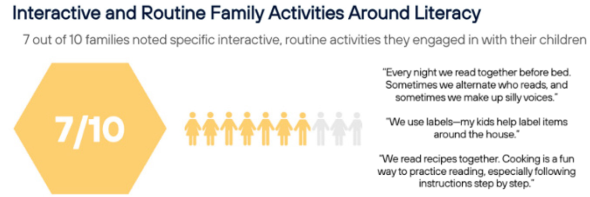
Integrate text and images

Ensure images and text work together to enhance understanding. Use clear titles, variable names, captions, and call-out boxes to reinforce key points.

Portray data accurately and ethically

Present data honestly, avoiding misleading graphics or selective data presentation. Ensure language and conclusions are supported by the data and reflect participants' experiences. Reviewing visualizations with participants before wider distribution helps ensure accuracy and community representation.

Example data visualizations and tools

<table>
<tr><th>Type</th><th>Definition</th><th>Example tools</th><th>Example</th></tr>
<tr><td>Word clouds</td><td>Show the frequency of words from data; larger words indicate greater frequency.</td><td>Web search 'free word clouds'</td><td>
</td></tr>
<tr><td>Graphs</td><td>Combine words with quantitative metrics (frequency, sentiment, etc.).</td><td>Excel,
R,
Google Sheets</td><td>
</td></tr>
<tr><td>Heat maps</td><td>Show the intensity of data in geographic space using colors and saturation.</td><td>Tableau,
PowerBI,
R,
ArcGIS</td><td>
</td></tr>
<tr><td>Quotes</td><td>Direct quotes illustrate key concepts and add richness to analysis.</td><td>Tableau,
PowerBI,
R,
ArcGIS</td><td>
</td></tr>
<tr><td>Combined</td><td>Use multiple types of visualizations to increase impact and effectiveness.</td><td>Canva,
Adobe Illustrator,
PowerPoint</td><td>
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