

RESEARCH REPORT

# Strengthening Federal Programs and Practices through Community Engagement

**OPRE Report #2024-181**

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*September 2024*

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# Executive Summary

Community-engaged research involves collaborating with community members as integral partners and valuing lived experience as essential expertise.<sup>1</sup> In the federal context, community-engaged research can provide critical context and practical input to inform program operations and policy development. At the same time, the federal context can introduce unique complexity to undertaking community-engaged research due to some of the characteristics of federally funded projects, such as their scale, multisite nature, or contracting requirements. In addition, some federal staff may feel unequipped to use such methods.

This report is about advancing the ability of and opportunities for the federal government to meaningfully engage people most directly affected by federal and other human services programs in the federal government's work. The intended audience is federal research staff looking to learn about engaging with community members to build knowledge, conduct research and evaluation, and improve programs.

The Urban Institute carried out the work reflected in this report under contract to the Office of Planning, Research, and Evaluation (OPRE) at the Administration for Children and Families within the US Department of Health and Human Services for the Advancing Contextual Analysis and Methods of Participant Engagement (CAMPE) project. From an environmental scan conducted for CAMPE, we provide examples of 14 federal projects that have used community-engaged approaches and describe strategies these community-engaged projects employed. We also describe the approach the CAMPE project took to developing and engaging a community advisory board (CAB)<sup>2</sup> including people with lived experience with federal human services programs. The conclusion examines how a CAB can provide feedback on OPRE's research processes and materials and explores how the CAMPE project can be a model for other federal offices and agencies looking to engage people with lived experience as partners in federal research and evaluation.

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<sup>1</sup> Urban Institute, "Community Engagement Resource Center: Urban Institute," accessed September 30, 2024, <https://www.urban.org/research-methods/community-engagement-resource-center#about>.

<sup>2</sup> We note that the term "CAB" is commonly used in research and evaluation practice and does not refer to a federal advisory committee; OPRE did not seek consensus advice from the CAB but rather sought a variety of perspectives to inform the project.

# Methods

We reviewed federal research and evaluation projects conducted in the past 10 years that involved community engagement. We narrowed down our options from 70 projects, ultimately reviewing 14 projects in detail and interviewing 11 project teams. We sought to address several questions, including the following:

1. What methods of community engagement have federally funded research and evaluation studies used?
2. What example community-engagement activities along the continuum of community-engaged research approaches are used within the federal context?
3. How did projects navigate community-engaged research approaches within the federal context?
  - a. What are supportive aspects within the federal research context?
  - b. What are challenging aspects within the federal research context?

The Urban Institute team also recruited, onboarded, trained, and supported a 13-member CAB to review and comment on several OPRE documents and materials related to research processes. The Urban team did not seek consensus advice from the CAB; instead, the team aimed to gather a diversity of perspectives. The documents and materials included OPRE's internal editorial style guide, OPRE's Welfare and Family Self-Sufficiency Learning Agenda,<sup>3</sup> a sample OPRE study-informed consent process and form, and a sample OPRE study survey. OPRE selected and shared materials with CAB members and provided relevant background and information about the request. Urban facilitated CAB meetings during an 18-month period and drafted final memos and products summarizing the CAB's recommendations.

The goals of the CAMPE CAB were the following:

- provide OPRE staff with the opportunity to learn from CAB members' firsthand experiences
- document best practices for community engagement in multiple research activities through the development and facilitation of a CAB

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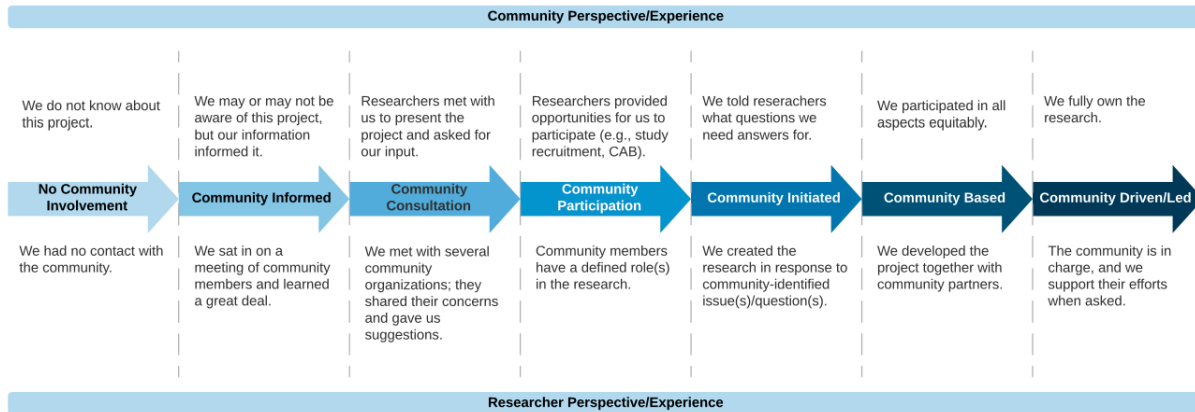
<sup>3</sup> US Department of Health and Human Services (HHS), Administration for Children and Families (ACF), Office of Planning, Research, and Evaluation (OPRE), *Welfare and Family Self-Sufficiency Learning Agenda*, OPRE Report 2023-241 (Washington, DC: HHS, ACF, OPRE, 2023), <https://www.acf.hhs.gov/opre/report/welfare-and-family-self-sufficiency-learning-agenda>.

- generate input and guidance to improve the quality of specific research tools and processes, including surveys, informed consent procedures, a style guide, and a learning agenda
- enhance CAB members’ understanding of federal research processes

## Framework: Continuum of Community Engagement

We define community engagement in research as collaborating with people at the heart of an issue being studied in a way that recognizes *community* members as integral partners and values members’ *lived experience* as essential expertise.<sup>4</sup> We further categorize this engagement along a continuum that starts at “no community involvement” and ends at “community driven/led” projects (Key et al. 2019). See figure E.1.

**FIGURE E.1**  
**Continuum of Engagement in Community-Engaged Research**



**Source:** Authors’ adaptation of Key et al. (2019) figure.

**Note:** CAB = community advisory board.

## Key Findings and Highlights

- Federal community-engaged research and evaluation can range from projects *informed* by community members to projects *driven* by community members.

<sup>4</sup> Urban Institute, “Community Engagement Resource Center.”

- In addition to informing single research and evaluation projects, community-engagement approaches can inform the processes and procedures that broadly affect research and evaluation activities (e.g., research procedures or guidance documents).
- The CAMPE project demonstrates how CABs can inform federal office or agencywide research processes and guidance documents.
- The CAMPE CAB generated specific recommendations for OPRE's internal editorial style guide, the Welfare and Family Self-Sufficiency Learning Agenda,<sup>5</sup> a sample OPRE study informed consent process and form, and a sample OPRE study survey. The CAB recommendations emphasized factors such as precision, clarity, equity, respect, human-centered language and framing, and community benefit.

## Conclusions

When people with lived experience are engaged as experts in federal projects rather than engaged solely as research subjects, they can strengthen all phases of the research including informing study questions and processes, designing data collection tools and enhancing data collection protocols, and ensuring final products are consistently accessible and respectful in their communication style.

Through the project's environmental scan and work with the CAB, CAMPE found that meaningfully engaging people with lived experience in federally funded research is possible and valuable. Many federal research projects have found ways to engage people with lived experience, capitalizing on supportive aspects of the federal research context and navigating its challenges. As further described in this report, CAMPE's approach to convening a CAB was grounded in relationship building and reciprocal learning, leading to novel insights regarding OPRE's research processes and guidance documents, and can serve as an example for future engagement of people with lived experience in federal research.

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<sup>5</sup> HHS, ACF, OPRE, *Welfare and Family Self-Sufficiency Learning Agenda*, OPRE Report 2023-241 (Washington, DC: HHS, ACF, OPRE, 2023), <https://www.acf.hhs.gov/opre/report/welfare-and-family-self-sufficiency-learning-agenda>.

# Strengthening Federal Programs and Practices through Community Engagement

## Introduction

Community-engaged research involves collaborating with *community members* as integral partners and valuing *lived experience* as essential expertise.<sup>6</sup> Community-engaged research in the federal context centers community members in the government's work. Community members can provide critical context and practical input that can be used to inform program operations and policy development. On the other hand, the federal research context can introduce unique complexity to undertaking community-engaged research due to some of the characteristics of federally funded projects, such as their scale, multisite nature, or contracting requirements. In addition, some federal staff may feel unequipped to use such methods.

This report is about advancing the ability of and opportunities for the federal government to meaningfully engage people who are directly affected by federal and other human services programs in the federal government's work. The intended audience is federal research staff looking to learn about engaging with community members in building knowledge, conducting research and evaluation, and improving programs.

We summarize information from a project the Urban Institute conducted under contract to the Office of Planning, Research, and Evaluation (OPRE) at the Administration for Children and Families (ACF) within the US Department of Health and Human Services to provide examples of community-engaged work within the federal context. Through this project, titled Advancing Contextual Analysis and Methods of Participant Engagement (CAMPE), we conducted an environmental scan to identify 14 federal projects that have used community-engaged approaches, and we describe strategies these community-engaged projects employed. We also describe the approach we took to assembling and engaging a community advisory board (CAB) including people with lived experience with federal human services programs for the CAMPE project.

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<sup>6</sup> Urban Institute, "Community Engagement Resource Center."

## About the CAMPE Project

In September 2021, OPRE contracted with the Urban Institute for assistance in better understanding, incorporating, and advancing equitable research practices in OPRE projects. OPRE is the research office that supports ACF within the US Department of Health and Human Services. ACF oversees the administration of many federal human services programs including Temporary Assistance for Needy Families, the Child Care and Development Fund program, refugee resettlement, and child welfare and foster care. OPRE conducts research and evaluation to assess how ACF programs function and how they might be improved.

The CAMPE project supports OPRE's efforts to develop tools and guidance for applying an equity lens to research and evaluation projects in the federal context. The project focuses primarily on ways to better engage people who have lived experience with ACF programs as collaborators and partners in research and evaluation. Key activities for CAMPE included (1) conducting an environmental scan to identify and document example federal research projects that incorporate participatory methods and (2) assembling and soliciting feedback from a CAB on several specific OPRE research processes and materials. Additional CAMPE activities included reviewing literature and consulting researchers across different disciplines (e.g., sociology, history, economics, public health, public policy, psychology, political science) on strategies for incorporating and analyzing context within human services research studies and evaluations. The Urban team also provided equity consultations to support OPRE's existing race equity efforts through facilitated conversations with staff about applying an equity lens in OPRE work.

This report summarizes results from **the environmental scan** of federal research and evaluation projects that involved community engagement and describes the CAMPE project's **CAB**.<sup>7</sup> Urban recruited, onboarded, trained, and supported a 13-member CAB to review and provide feedback on several OPRE documents and materials related to research processes.

## Report Roadmap

We begin by **defining community engagement** and the ways it can vary. We categorize this engagement along a continuum that starts at “no community involvement” and ends at “community driven/led” projects (Key et al. 2019). Drawing from our environmental scan, we provide **brief examples from federal projects** that illustrate activities at different points along the community-engagement

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<sup>7</sup> We note that the term “CAB” is commonly used in research and evaluation practice and does not refer to a federal advisory committee; OPRE did not seek consensus advice from the CAB but rather sought a variety of perspectives to inform the project.

continuum. We use these examples to discuss how these projects incorporated community in various stages of the work (e.g., during recruitment, design, and analysis). Finally, we summarize project teams' descriptions of how the federal context—including funding mechanisms, Paperwork Reduction Act (PRA) requirements, and federal authority and reputation—affected the community-engaged projects.

The projects we reviewed for the environmental scan exemplified ways community engagement can inform individual research and evaluation projects. Another approach can be to involve community members in the processes and procedures that broadly affect research and evaluation activities (e.g., research procedures or guidance documents). The CAMPE project's CAB used the latter approach, which we discuss in the second half of the report. We describe the CAMPE CAB process and the **recommendations CAB members offered** on the selected OPRE materials and processes. We demonstrate how this engagement informed the OPRE Division of Economic Independence's work, and how staff within and outside OPRE might use lessons from the project to advance their engagement with people with lived experience in the future.

## Community Engagement in Research: Definitions, Purpose, and Framework

Community engagement involves activities an entity or organization carries out in partnership with a group of people directly affected by or connected to an issue (Fawcett et al. 1995). Community engagement in research involves collaborating with people at the heart of an issue that is being studied in a way that recognizes *community members* as integral partners and values members' *lived experience* as essential expertise.<sup>8</sup> "Community" may refer to people with a shared identity (e.g., demographic characteristics), experience (e.g., participating in an activity), and/or geography (i.e., living in the same area).

We focus this report on community-engaged methods broadly. *Community-engaged research* or *community-engaged methods* are umbrella terms encompassing various approaches.<sup>9</sup> The projects we feature in this report are highly participatory—that is, they were done in partnership or close

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<sup>8</sup> Urban Institute, "Community Engagement Resource Center."

<sup>9</sup> One of the most intensive approaches is "participatory action research"—a specific method wherein people at the center of the research (who traditionally would be the "research subjects") hold the decisionmaking power and are its designers (Bradley 2015). Projects may be community engaged without being participatory action research studies, but a participatory action research study is always community engaged.

collaboration with people with lived experience. We note that in literature and in practice, “participatory research” and “community-engaged research” often are used interchangeably.

## **The Value of Community Engagement in Research**

When federal research staff evaluate programs to inform potential improvements in partnership with the people who have the most intimate connections to the programs, they accomplish an important goal of the Foundations for Evidence-Based Policymaking Act (Vought 2020) around engaging key stakeholders. As OMB noted in its guidance to federal agencies on implementing the Evidence Act, a leading practice for evaluation is to “identify and involve critical internal and external stakeholders to help ensure relevant and useful evaluation activities” (Vought 2020, p. 6). Community engagement also aligns with federal imperatives on equity (ACF 2023).<sup>10</sup> Ultimately, community-engaged approaches strive to create more valid, relevant, and useful research for improving programs, services, and outcomes for people and communities at the heart of issues being studied. Studies show community-engaged research contributes to stronger policy (especially health policy), partnership success, and specific program outcomes (Wallerstein et al. 2020).

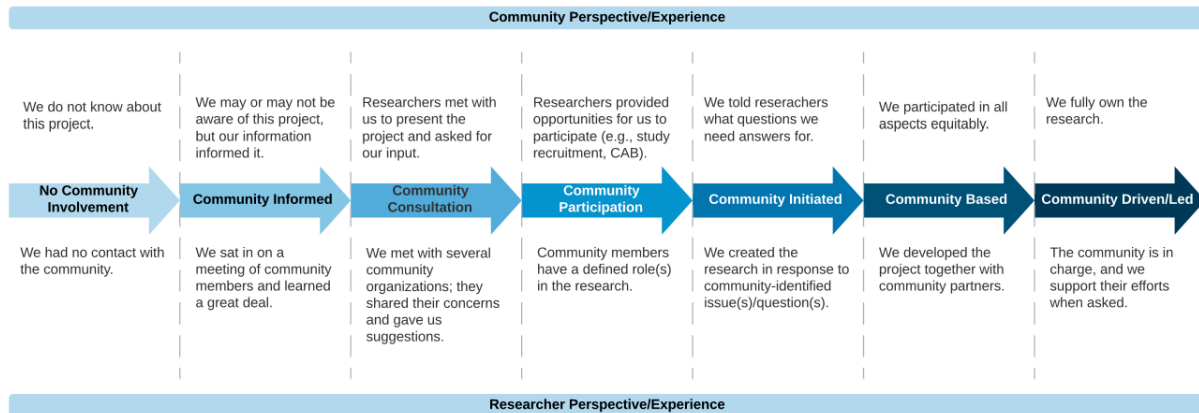
## **Framework: Continuum of Community Engagement**

The various research approaches subsumed by the blanket term “community-engaged methods” exist along a continuum of community engagement in research, as depicted in figure 1.

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<sup>10</sup> ACF (Administration for Children and Families), “Equity in Action,” accessed September 30, 2024, <https://www.acf.hhs.gov/equity>; Exec. Order No. 13, 985, 86 F.R. 7009 (2021).

**FIGURE 1**  
**Continuum of Engagement in Community-Engaged Research**



Source: Authors' adaptation of Key et al. (2019) figure.  
 Note: CAB = community advisory board.

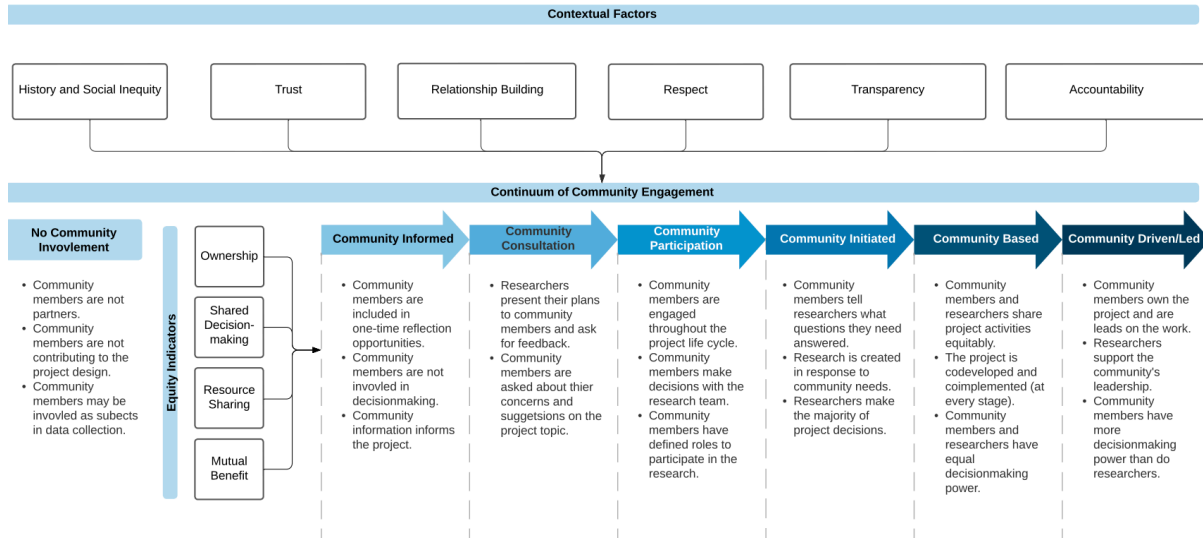
At each point along the continuum, beginning with *community informed*, community members are engaged as experts, collaborators, and partners. Projects may involve community members as subjects of the research participating in interviews, surveys, focus groups, or other data collection modalities, but solely contributing to data does not constitute a community-engaged approach. Community engagement toward the left end of the continuum involves less sustained activity and less participation across different project phases by community members. Toward the right end of the continuum, community members participate in more aspects of the project and may make shared decisions about the work. Any project might operate at different points on the continuum in different phases of the research process.

Figure 1 illustrates how community members and researchers experience each point along the continuum of engagement. For example, in a *community-informed* approach, researchers will have used what they learned while participating in a community setting or meeting to inform the project. Although their information will have informed the project, community members may or may not know about the project. At the *community-driven or -led* point on the continuum, community members fully own the project while researchers support the community's efforts when requested. Below, we describe activities associated with each point along the continuum from our review of select federal projects.

In figure 2, we expand on figure 1 by showing contextual factors that can affect engagement dynamics (e.g., history and social inequity, trust, relationship building, respect, transparency, and accountability). Figure 2 also lists indicators that can be used to assess the degree of equity in the

partnership (e.g., ownership, shared decisionmaking, resource sharing, and mutual benefit) (Key et al. 2019).

**FIGURE 2**  
**Contextual Factors, Equity, and the Continuum of Community Engagement**



Source: Authors' adaptation of Key et al. (2019) figure.

## CONTEXTUAL FACTORS

Within the continuum, contextual factors can affect engagement dynamics. The factors highlighted below are not exhaustive but illustrate ways context might influence project effectiveness.

- History and social inequity.** Community-engaged researchers often confront tensions when engaging with communities related to a community's historical experiences and power dynamics. Some of these tensions might stem from previously exploitative or harmful research practices.<sup>11</sup> Other tensions might arise from differences in perceived power between the researchers and the community. Researchers often have financial and other resources; authority; the infrastructure to accomplish a research agenda that may or may not be

<sup>11</sup> Richard Morse, "Grimes v. Kennedy Krieger Institute: Nontherapeutic Research with Children," *AMA Journal of Ethics*, November 1, 2003, <https://journalofethics.ama-assn.org/article/grimes-v-kennedy-krieger-institute-nontherapeutic-research-children/2003-11>; Robyn L. Sterling, "Genetic Research among the Havasupai: A Cautionary Tale," *AMA Journal of Ethics*, February 1, 2011, <https://journalofethics.ama-assn.org/article/genetic-research-among-havasupai-cautionary-tale/2011-02>; Eric Turkheimer, Kathryn P. Harden, and Richard E. Nisbett, "Charles Murray Is Once Again Peddling Junk Science about Race and IQ," *Vox*, May 18, 2017, <https://www.vox.com/the-big-idea/2017/5/18/15655638/charles-murray-race-iq-sam-harris-science-free-speech>.

supported by the community; and a platform to share findings from this research, including depictions of the community. A community's history with researchers can affect whether and how much its members will engage and be willing to contribute personal experiences and knowledge. Researchers can take steps to address tensions by acknowledging the history (positive and negative) of research, policymaking, and program design and implementation pertaining to a community. Researchers also can state and demonstrate intentions to contribute positively to community priorities. In addition, research teams can reflect on their positions and biases and identify existing power dynamics or differences in researchers' and community-members' perspectives that might affect engagement in and quality of the project.

- **Trust.** To trust is to “believe that someone is good and honest and will not harm you, or that something is safe and reliable.”<sup>12</sup> The level of trust between community members and researchers affects engagement. If community members do not trust the research or researchers or do not feel safe, the engagement is less likely to be productive for community members and researchers. Researchers may earn trust over time by following through on commitments and demonstrating accountability to community priorities and preferences.
- **Relationship building.** Relationship building, or the extent to which community members and researchers interact and get to know one another, is an important aspect of engagement. Poor relationships suggest that engagement quality likely will suffer. In community-engaged research, community members with lived experience are asked to bring their personal experiences to a project in ways that researchers often are not. Researchers can invest in getting to know community members outside of research activities, which may help level the investment that partners are making and foster deeper connection and engagement.
- **Respect.** Respect is valuing and showing admiration and care.<sup>13</sup> How much value a project team places on community member contributions and expertise affects engagement quality. Respect is something that is given and shown.<sup>14</sup> Researchers may demonstrate respect for community members as people and experts through compensation, listening to and acting on members' recommendations, and creating space for community leadership when possible.

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<sup>12</sup> Cambridge University Press and Assessment, “Trust,” Cambridge English Dictionary, accessed May 20, 2024, <https://dictionary.cambridge.org/us/dictionary/english/trust>.

<sup>13</sup> Cambridge University Press and Assessment, “Respect,” Cambridge English Dictionary, accessed July 23, 2024, <https://dictionary.cambridge.org/us/dictionary/english/respect>.

<sup>14</sup> Cambridge University Press and Assessment, “Respect.”

- **Transparency.** Transparency is doing something openly and without secrets.<sup>15</sup> Community-engaged approaches rely on strong partnerships. Poor transparency can undermine each partner’s ability to be a partner. Transparency in community-engaged research can include setting expectations with the community members about what is and is not possible within the research project and being clear about how community contributions will be valued, recognized, and incorporated into the research project.
- **Accountability.** Accountability means being responsible for something.<sup>16</sup> Project teams that demonstrate little accountability for what occurs during the course of a project may come across as unreliable partners to community members. Accountability in community-engaged research includes understanding whom the research affects, recognizing how a project action or inaction might affect community members, and committing to taking responsibility. Accountability can mean carving out resources to ensure the project helps the community in a way the community desires or incorporating a community board that provides oversight of project actions and decisions.

## EQUITY INDICATORS

Community-engagement approaches strive to realign power so that the people most directly affected by an issue being studied have more say in how knowledge is produced and what knowledge is produced (Shakesprere et al. 2021). Equity indicators provide axes along which that power realignment can be characterized or even measured. The equity indicators below are not exhaustive but illustrate characteristic features that can be used to assess or reflect on the balance of power among researchers and community members.

- **Ownership.** Ownership means the degree to which community members have agency to take action and dictate a project’s direction. Ownership may include community members’ hosting project data on their own servers or platforms, serving as project leaders like principal investigators or project managers, or determining what findings get disseminated and to whom.
- **Shared decisionmaking.** Shared decisionmaking means the degree to which community members have authority in line with researchers’ authority on project activities. Among many

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<sup>15</sup> Cambridge University Press and Assessment, “Transparency,” *Cambridge English Dictionary*, accessed July 23, 2024, <https://dictionary.cambridge.org/us/dictionary/english/transparency>.

<sup>16</sup> Cambridge University Press and Assessment, “Accountability,” *Cambridge English Dictionary*, accessed July 23, 2024, <https://dictionary.cambridge.org/us/dictionary/english/accountability>.

possible project areas, community members may share in deciding about factors such as staffing, partnerships, budget expenses, project priorities, research topics, and data sources.

- **Resource sharing.** Resource sharing means the degree to which something useful or of value is shared. In community-engaged research, resources might mean financial resources or things like office space, project tools, social/professional networks, or staffing capacity. Resource sharing often involves compensation but can include professional opportunities for skill and knowledge building as well as career advancement.
- **Mutual benefit.** Mutual benefit means the degree to which all partners in research receive some benefit. In community-engaged research, benefits are not one-sided, wherein researchers extract information without providing anything tangible in return. A mutual benefit might be cocreating opportunities to advance community goals or defining and carving out resources that support community goals. These goals may be inside or outside of the original research project's scope.

## Community Engagement in Select Federal Projects

The CAMPE project's environmental scan focused on the following research questions:

1. What methods of community engagement have federally funded research and evaluation studies used?
2. What example of community-engagement activities along the continuum of community-engaged research approaches are used within the federal context?
3. How did projects navigate community-engaged research approaches within the federal context?
  - a. What are supportive aspects within the federal research context?
  - b. What are challenging aspects within the federal research context?

The CAMPE project was especially interested in how federal offices navigate conditions specific to the federal research and evaluation context, such as the scale, multisite nature, and contracting requirements of some projects. The lessons shared by federal project teams may provide insights for federal staff interested in employing similar approaches in their own projects.

The environmental scan focused on key research areas within OPRE's three research divisions: the Division of Economic Independence, the Division of Child and Family Development, and the Division of

Family Strengthening. Together, these divisions cover many research topics including welfare and family self-sufficiency; adolescent pregnancy prevention and sexual risk avoidance; child care; child support services; child welfare, Head Start; Health Profession Opportunity Grants;<sup>17</sup> Healthy Marriage and Responsible Fatherhood programs;<sup>18</sup> and home visiting. Beyond these topics, the scan drew from federal programs, offices, and research areas that were not directly related to human services but provided examples of community engagement in a federal context. As part of the scan, OPRE provided initial assistance in identifying relevant projects. Urban then selected 14 research projects for in-depth review and interviewed 11 of the 14 project teams.

## Methods

The environmental scan of federal projects incorporating community-engaged approaches involved the following:

1. identifying and selecting initial federal research and evaluation projects
2. scanning project materials and picking a subset for in-depth review
3. conducting interviews with selected project teams about their projects' community engagement approaches

### IDENTIFYING INITIAL FEDERAL RESEARCH PROJECTS

With OPRE's input, Urban compiled a list of current and past federal research and evaluation projects with materials or publications that described community-engaged approaches with program participants. When scanning ACF's, OPRE's, and other relevant federal offices' and agencies' websites to locate potential projects, the Urban team used key search terms such as "community engagement in federal government," "public engagement and planning," "participatory methods," "participatory

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<sup>17</sup> The Office of Family Assistance administered the Health Profession Opportunity Grants, which were awarded "to organizations to provide education and training to TANF [Temporary Assistance for Needy Families] recipients and other low-income individuals for occupations in the health care field that paid well and were expected to either experience labor shortages or be in high demand." ACF (Administration for Children and Families), "Health Profession Opportunity Grants (HPOG)," February 21, 2023, <https://www.acf.hhs.gov/ofa/programs/hpog>.

<sup>18</sup> Healthy Marriage and Responsible Fatherhood programs are administered by the Office of Family Assistance and "provide \$150 million per year in discretionary grants, contracts, research and evaluation, and other activities to strengthen families, promote responsible parenting, and improve family economic stability. ACF, "Healthy Marriage & Responsible Fatherhood," July 25, 2023, <https://www.acf.hhs.gov/ofa/programs/healthy-marriage-responsible-fatherhood>.

research,” “participatory action research,” “participatory planning,” and “human-centered design.” The federal project officers for the CAMPE project consulted their federal colleagues for additional suggestions and recommendations. The Urban team also received a list of projects from a federal research team that had recently reviewed and catalogued federal initiatives, task forces, and advisory councils that incorporated people with lived experience with federal programs (Skelton-Wilson et al. 2021).

### SCANNING PROJECT MATERIALS AND SELECTING A SUBSET FOR IN-DEPTH REVIEW

From an initial list of 70 potential projects, we narrowed the list to 20 projects by selecting ones that met the following criteria: were federally funded, were conducted in the past 10 years, focused on human services programs or populations served by these programs, and used community-engaged approaches involving program participants across a range of research activities.

For these 20 projects, we reviewed project descriptions and reports. We catalogued all information we could find about the projects’ research design and methods, research focus area and program domain, study population, types of participatory methods used, and number of people engaged in participatory ways. We then coded project materials from the 20 selected projects to summarize commonalities and differences related to the following themes: type of community engagement, participatory activities, compensation, study outcomes, benefits, barriers or challenges, and promising practices.

We then narrowed down the list of 20 projects to a final list of 14 projects for deeper review and interviews by focusing on diversifying representation across the following areas: stage in the research process wherein people with lived experience were engaged (design, data collection, data analysis, dissemination), type of community engagement, research focus area and program domain, focal population, research method, and funding agency.

Three of the 14 projects involved Tribal communities. In federally funded research with Tribal Nations, community engagement is not just an approach to research but also a requirement.<sup>19</sup> Tribal Nations are sovereign nation-states with an inherent interest in and right to approve or disapprove research within their communities (Tribal Evaluation Workgroup 2013). Our scan identified and included several exemplar community-engaged projects with Tribal Nations.

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<sup>19</sup> Historically, research has been imposed on Tribal Nations rather than conducted in partnership with them. Only recently has the need to recognize Tribal sovereignty and conduct community-engaged and collaborative research with Tribal Nations become more widely accepted and recognized (Tribal Evaluation Workgroup 2013).

## CONDUCTING INTERVIEWS WITH SELECTED PROJECT TEAMS ABOUT THEIR PROJECTS' COMMUNITY-ENGAGEMENT APPROACHES

We invited team members from the 14 projects to participate in team interviews. One project team addressed questions via email, and two project teams were not available for interviews. We ultimately interviewed 11 teams with tailored questions based on gaps in the information gleaned from published project materials. We also probed on topics not typically included in project materials such as lessons learned about community engagement, best practices, and methodological challenges.

For the interviews, we requested that project teams include the individuals and organizations most involved in the selected projects so we could capture their perspectives on effective community engagement. Some interviews included federal project officers only, members of the research team only, or a combination of the research team and federal project officers together. Only one project interview included research team members who were also community members. Table 1 lists the 14 projects from the environmental scan.

**TABLE 1**  
**Federal Projects Included in the Environmental Scan (n = 14)**

<b>Project name (shortened title)</b>	<b>End date</b>	<b>Funding source</b>	<b>Project summary</b>
Web-Based Survey Data Collection with Peer Support and Advocacy Organizations: Implications of Participatory Methods ( <i>Web-Based Survey</i> )	2012	NIH	People with psychiatric histories were involved in designing and implementing the 2012 National Survey of Peer-Run Organizations, one of the first surveys of a nationally representative sample of mental health peer-run organizations: nonprofit venues for support and advocacy that are defined by people with psychiatric histories being in positions of authority and control.
A Roadmap for Collaborative and Effective Evaluation in Tribal Communities ( <i>Road Map</i> )	2013	Children's Bureau	To address Tribal communities' fear of or distrust in evaluation, stemming from historical trauma produced by past invasive or harmful evaluations, the ACF Children's Bureau formed a work group comprising representatives from Tribal child welfare programs, evaluators, university researchers, technical assistance providers, and federal program partners to develop ways to improve evaluation practice with Tribal communities. The work group developed A Roadmap for Co-Creating Collaborative and Effective Evaluation to Improve Tribal Child Welfare Programs.
Accessible and Participatory Methods for Involving People with Mental Disabilities in Housing Discrimination Testing ( <i>Involving</i> )	2017	HUD	HUD conducted a participatory pilot study of market rental housing discrimination of people with intellectual and psychiatric disabilities to evaluate testing experiences.

Project name ( <i>shortened title</i> )	End date	Funding source	Project summary
<i>People with Mental Disabilities in Housing Discrimination Testing</i>			
The Imperial County Community Air Monitoring Network: A Model for Community-Based Environmental Monitoring for Public Health Action ( <i>Imperial County Air Monitoring</i> )	2017	NIH	The Imperial County Community Air Monitoring Network is a collaborative group of community, academic, nongovernmental, and government partners designed to fill the need for obtaining more detailed data on particulate matter in an area whose levels often exceed air quality standards. Community members and researchers in the network have defined roles as part of an equitable partnership.
Tribal Evaluation of the 2nd Generation of Health Profession Opportunity Grants, Tribal HPOG 2.0 Evaluation ( <i>Tribal HPOG 2.0</i> )	2019	OPRE	NORC at the University of Chicago led a comprehensive implementation and outcome evaluation of the five Tribal HPOG 2.0 grantees. The evaluation was designed in collaboration with the Tribal HPOG 2.0 grantees and the Tribal HPOG 2.0 Technical Work Group.
Water, Our Voice to the Future: Climate Change Adaptation and Waterborne Disease Prevention on the Crow Reservation ( <i>Crow Reservation</i> )	2019	EPA	In 2005, a group of Tribal stakeholders and a Little Big Horn College faculty member conducted a weeklong communitywide environmental health assessment and concluded that water contamination was the most serious health threat affecting Tribal members. The team used community-based participatory research to document the serious contamination of the Tribal communities' rivers and strategies to overcome the legal, regulatory, policy, community-capacity, and financial challenges to addressing the problems.
Ethics Training for Health in Indigenous Communities ( <i>rETHICS</i> )	2019	NIH	rETHICS is an ethics training curriculum aligned within American Indian and Alaska Native context, culture, and community-level ethical values and principles. The curriculum was created to train researchers, especially those planning to work with Native communities, in these values and principles.
Self-Regulation Training Approaches and Resources to Improve Staff Capacity for Implementing Healthy Marriage Programs for Youth ( <i>SARHM</i> )	2020	OPRE	Researchers in prevention science and public health partnered with practitioners who deliver youth healthy marriage and relationship education programs to translate the concept of coregulation into action.
Using Participatory Methods to Enhance Youth Engagement in Substance Use Research ( <i>Youth and Substance Abuse</i> )	2021	NIH	A local youth health coalition and the principal investigator engaged in a youth participatory action research project to examine the environmental factors that influence substance use among young people in a community on the US-Mexico border. <sup>a</sup>
Community-Based Participatory Research Program ( <i>CBPR</i> )	2022	NIH	The National Institute of Minority Health and Health Disparities' CBPR supported

Project name ( <i>shortened title</i> )	End date	Funding source	Project summary
			collaborative interventions that involve scientific researchers and community members to address diseases and health disparities.
Co-Designing a Program to Lower Cardiovascular Disease Risk in Midlife Black Women ( <i>Heart Disease</i> )	2022	NIH	The B-SWELL program was designed to increase awareness about cardiovascular disease risk factors, stress, and healthy lifestyle behaviors among midlife Black women. In partnership with an existing community research advisory board, materials were codeveloped and piloted for a culturally adapted B-SWELL program.
Employment Processes as Barriers to Employment in the Lower-Wage Labor Market ( <i>Employment Barriers</i> )	Ongoing	OPRE	This project systematically reviewed what is known about how employment processes can present barriers for workers of color. The project also explored and identified potentially promising strategies to address biases in the low-wage labor market. The project engaged people with lived experience as stakeholders early on to define the scope of the project through a one-time engagement; it engaged them as expert consultants to continually review products, the research design, and proposed recommendations.
Learning to Enhance Strategies for Coaching Families Virtually: Lessons from Iowa’s Family Development and Self-Sufficiency Home Visiting Program ( <i>SPARK</i> )	Ongoing	OPRE	Iowa’s FaDSS program is a comprehensive, statewide home-visiting program that provides employment-related coaching for families with low incomes that receive Temporary Assistance for Needy Families and that face complex challenges to employment. FaDSS used a data-driven reflection approach to program improvement called “Learn, Innovate, Improve” to assess its successes and challenges with the implementation of virtual service delivery. The project engaged youth by cocreating the curriculum and cofacilitating groups and sessions.
Human Trafficking Policy and Research Analyses Project ( <i>Human Trafficking</i> )	Ongoing	OTIP	The Human Trafficking Policy and Research Analysis Project involved formative evaluation of the Demonstration Grants to Strengthen the Response to Victims of Human Trafficking in Native Communities Program. The project engaged grantees in shaping the approach to services, including the creation of the Community Expert Group of Indigenous community members.

**Source:** The Urban Institute’s environmental scan.

**Notes:** NIH = National Institutes of Health; ACF = Administration for Children and Families; HUD = US Department of Housing and Urban Development; OPRE = Office of Planning, Research, and Evaluation; B-SWELL = Midlife Black Women’s Stress and Wellness; FaDSS = Family Development and Self-Sufficiency; EPA = US Environmental Protection Agency; OTIP = Office on Trafficking in Persons.

<sup>a</sup> Youth participatory action research is a form of participatory research whereby young people learn how to conduct research and use their findings to engage in social action at the local community and policy levels.

## EXAMPLE PROJECT ACTIVITIES ALONG THE CONTINUUM OF COMMUNITY ENGAGEMENT

Below we describe example activities from select federal projects that illustrate engagement at each point in the continuum. By design, we did not review projects in the *no community involvement* category. The projects involved community consultation at a minimum. Because we focused our scan on exemplar projects that engaged community members, many activities fall on the right end of the engagement spectrum (i.e., more toward *community driven/led*).

- **Community informed.** Activities and approaches are *community informed* if they include one-time or periodic engagements that *inform* limited aspects of a project. Most projects we reviewed involved additional elements that more accurately reflect community consultation or community participation (see below). Example community-informed activities included project teams' drawing on information from community members to inform site and study topic selection. Typically, approaches that are community informed do not include ongoing or iterative project engagement. For example, in the *Employment Barriers* project, people with lived experience were engaged on a one-time basis early on in the project to shape the scope of the project and identify possible areas of intervention to investigate that are related to addressing barriers in the low-wage labor market for workers of color (although they later recruited people with lived experience to participate in a more ongoing way, reviewing key deliverables).
- **Community consultation.** Activities and approaches constitute *community consultation* if they involve direct input on various (though not necessarily all) project components. At a *community consultation* level of engagement, community members do not share in project decisionmaking with the research team. However, there is some iterative conversation between the community members and the researchers rather than a single opportunity to "inform" with no follow-up or future refinement and discussion. Within the federal projects we reviewed, consultation-level activities included community input on research questions, data collection approaches and protocols, recruitment strategies, data collection timing, and/or outcome measures. For example, in the *Involving People with Mental Disabilities in Housing Discrimination Testing* project, the project team assembled an advisory group, which it referred to as the "community expert panel." The expert panel included members with lived experience, disability advocacy experience, and academic and research experiences to provide guidance to the research team and the US Department of Housing and Urban Development during the course of the study. The community expert panel provided input on working with housing discrimination testers with

intellectual and psychiatric disabilities. The panel's input led to identifying a range of accommodations for making in-person testing possible and accessible to testers with disabilities.

- **Community participation.** Activities and approaches qualify as *community participation* when project teams not only engage community members throughout the project but also share in some decisionmaking. These projects often cocreated project plans and included continuous feedback cycles to refine decisions and plans together. To facilitate community participation, the projects took several preparatory steps, such as pitching the project idea to community members and holding training sessions (e.g., human-centered design sessions) with researchers, service providers, community members, and CABs and/or working groups. For example, in the *Heart Disease* project, the project's principal investigator presented her research proposal to an existing community research advisory board (C-RAB) prior to receiving funding to assess the C-RAB's interest and feedback. Once funding was secured, the principal investigator and C-RAB established a formal partnership, specifying roles and duties for the principal investigator and the C-RAB members. The first phase of the project involved the principal investigator's working closely to establish trust and ensure the C-RAB's familiarity with the study's purpose and expected outcomes. The project involved developing a wellness program, and the principal investigator drafted an initial outline and content and sought feedback from the C-RAB. The C-RAB focused on content clarity, value, and cultural relevance. The project selected two C-RAB members with relevant experience to serve as facilitators for the pilot program. The facilitators received training, and the principal investigator provided one-on-one support as needed.
- **Community initiated.** Activities and approaches are classified as *community initiated* when a project idea originates from community members. While this level of engagement is enhanced when community members are involved throughout the project, researchers typically make primary project decisions. The *Web-Based Survey* project included features we highlight as community initiated. Specifically, community members, including the project's principal investigator, who had shared lived experience, conceived of the project and its goals. The project involved people with psychiatric histories designing and implementing a national survey of mental health peer-run organizations to understand the services these understudied organizations provide to communities across the country.
- **Community based.** Activities and approaches are *community based* when community members and researchers share project activities and decisions equitably. Several federal projects we reviewed met this criterion. For instance, the Tribal evaluation team of *Tribal HPOG 2.0* met

with a Tribal grantee to share research questions and ensure the questions were grounded in local context and interest. When appropriate, the team encouraged Tribal leads and administrators to take part in evaluation discussions. Together, the Tribal evaluation team and grantees developed memorandums of understanding to clearly define each entity's roles and responsibilities. The team sought approval from several Tribal entities, including a regional Indian Health Service institutional review board and institutional review boards at Tribal colleges. The Tribal evaluation team also included the Tribal National Research Group early on to understand what content and format the group preferred for informed consent forms. Tribal grantees reviewed recruitment and data collection materials, dissemination methods, and protocols. The grantees also developed interview and focus group protocols to be culturally sensitive and strengths based.

- **Community driven/led.** The continuum designates activities and approaches as *community driven/led* when community members lead the work with researchers from the outset and make ultimate decisions about project focus, approach, and activities. The *Crow Reservation* project exemplifies this level of engagement. This project team was composed almost entirely of community members and researchers with existing ties to the community. The project arose from decades of community observations of environmental and health issues and was conducted with the goal of quantifying these issues and identifying solutions to improve the health and well-being of the community. The team sought community consensus on the project focus and stayed committed to the community's priorities throughout the work. The team has continuously mentored and trained other community members and students of all ages to continue the work, ensuring that the effort will continue as long as the community needs it.

## How Projects Navigate Community Engagement in the Federal Context

In this section, we consider how community engagement operated within the federal context across the federal projects selected for the environmental scan. We note project differences in funding mechanisms and in collaboration between the federal government and researchers. We also discuss implications of PRA requirements for projects. We reviewed and analyzed the published and unpublished program materials and interview notes to arrive at these findings. The materials we reviewed typically did not mention the federal context beyond naming the federal funding source. In interviews with project teams, we asked about the supportive and challenging aspects of the federal

context when carrying out community-engaged projects. Because we focused exclusively on projects that succeeded in incorporating participatory approaches, we may not be capturing all barriers that may prevent projects from using these methods.

## Supportive Aspects within the Federal Context

Project teams discussed aspects of the federal context that were aligned with and/or facilitated the use of community-engaged methods. Project teams generally focused on what helped from a community partner recruitment standpoint and what helped from a project administration standpoint.

### PROJECT LEGITIMACY WHEN RECRUITING PARTNERS

From a recruitment standpoint, several project teams explained that being involved with federally funded projects had given them **legitimacy with some community partners**. For at least one project team, the federal funding not only provided legitimacy with the community but also neutralized potential political concerns about participating. The project team shared that its community partner considered the project's National Institutes of Health funding a more neutral source than potential funding from state and local government agencies, whose histories were more problematic in the community.

### FUNDING ANNOUNCEMENTS THAT CALL FOR COMMUNITY-ENGAGED METHODS

From a project administration standpoint, some project teams talked about specific aspects of funding opportunity announcements that aided the work. Specifically, some **funding announcements explicitly called for community-engaged approaches**. Teams explained that budgeting for and incorporation of community-engaged methods were easier when a project called for the approach at the outset. Project teams could plan for and incorporate more extensive and sustained engagement throughout the project when community engagement was an explicit expectation. And when writing project proposals, project teams could worry less that the costs associated with these methods (e.g., budgeting compensation and extended time for engaging community members) would disadvantage them by limiting the remaining resources they could budget for other proposed project components.

### LONGER-TERM FUNDING PERIODS

Other project teams talked about federal funding structures designed to support the methods' iterative and time-intensive steps. A project team from the National Institutes of Health's Community-Based Participatory Research Program shared that the program was an 11-year initiative that included a 3-

year planning grant, a 5-year implementation grant, and then a 3-year dissemination and sustainability grant. The **long-term funding and separate funding for different phases** allowed project teams to be intentional about planning for their community engagement and flexible to respond to community needs during the course of the project. The dedicated time and funding for sustainability at the end supported partnerships between researchers and community partners and relationships that lasted beyond the project period.

### SUPPORTIVE AND KNOWLEDGEABLE FEDERAL PROJECT OFFICERS

Project teams cited knowledge about community-engaged methods and frequent interaction with the project team as qualities or approaches of federal project officers that strengthened the project's community-engaged approaches. Across our interviews, staff from projects that had **frequent interaction with their federal project officers** touted the importance of strong relationships between contractors and federal project officers. Frequent interactions, which project teams equated with stronger relationships, meant greater help from the federal project officers in troubleshooting and addressing potential challenges.

Projects such as Learning to Enhance Strategies for Coaching Families Virtually (known as SPARK) and Tribal HPOG 2.0 emphasized how having federal project officers with deep knowledge of both community-based participatory methods and federal requirements helped them navigate the federal context. Specifically, **knowledgeable federal project officers** understood PRA requirements and could help teams decipher which rules applied to their projects. As an interviewee from the Tribal HPOG 2.0 project team shared, "Both ACF and the contractor were experienced in community-based participatory research with Tribal communities prior to this project. This meant we were able to build into the contract realistic expectations around time, budget, and approach from the beginning."

### Challenging Aspects within the Federal Context

Project teams discussed aspects of the federal context that tended to make using community-engaged methods more challenging. The top three challenges were contractual limitations on compensating community partners, restrictions on using federal funding for the provision of food, and PRA requirements.

### COMPENSATION PROCEDURES

Several project teams spoke about **challenging procedures when compensating community partners**. Some contracts restricted the method of compensation to gift cards rather than cash or checks. To pay

people with a check or direct deposit, projects were required to hire community members as consultants or subcontractors, which is not always possible; it depends on the project's structure and requirements or the contracting agency's capacity. Team members noted that gift cards can limit where people can shop and sometimes what they can buy, creating challenges for people receiving those cards. In addition, gift cards often pose technical challenges to recipients due to activation steps, expiration dates, or lost value over time, further burdening those compensated via gift card.

### RESTRICTIONS ON PURCHASING FOOD

Other project teams reported that the **federal policy that restricts using appropriated funds for food** was challenging. The policy applies to all federal agencies and prohibits operations and program staff from using appropriated funds for food.<sup>20</sup> The policy, with select exceptions, applies to conferences and meetings; beverages and meals, whether full meals or light refreshments; and federal and nonfederal participants. Most project teams discussed how integral food was to community engagement. Providing food as part of meetings facilitates trust building as researchers ask community members to share personal experiences. In addition, community-engagement work often occurs in the evenings or on weekends, when children are present. Providing food enables collaboration during these times by helping address the needs of community members' children. Finally, offering food is a nonmonetary way to demonstrate appreciation for people's time.

A few teams pointed out that restrictions on buying food with federal funds meant researchers had to use their own money or fundraise elsewhere to offer food as part of their project, which brought additional complication to the already complex work.

### PAPERWORK REDUCTION ACT REQUIREMENTS

For the subset of project teams that were conducting activities subject to PRA requirements, PRA was a commonly cited challenge to community-engaged methods. The PRA of 1995 is a law governing how federal agencies collect information from the American public. The law is intended to protect the public's privacy and time and to ensure data from information collections subject to PRA are high quality and a good fit for the proposed use.<sup>21</sup> For any information collections subject to PRA (including

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<sup>20</sup> US Department of Health and Human Services, "HHS Policy on the Use of Appropriated Funds for Food," December 2022, <https://www.hhs.gov/grants-contracts/contracts/contract-policies-regulations/spending-on-food/index.html>; "Can Your Agency Use Appropriated Funds for Meals and Light Refreshments?" (Supersedes 2005 Version), US Government Accountability Office, May 10, 2011, <https://www.gao.gov/products/c00478>.

<sup>21</sup> US General Services Administration and OMB (Office of Management and Budget), "A Guide to the Paperwork Reduction Act," accessed September 30, 2024, <https://pra.digital.gov/>.

those carried out by federal contractors or grantees), federal agencies must submit Information Collection Requests to OMB to request approval of the information collection. The project teams that were conducting activities subject to PRA requirements described several challenging aspects of adhering to PRA requirements that affected their community-engagement efforts. Community engagement requires flexibility to adequately respond to evolving community needs; project teams found PRA requirements limited that flexibility. Several teams described difficulties determining which aspects of their projects' participatory approaches were subject to PRA requirements. Overall, the PRA-related challenges that project teams cited most were **time, the required advance planning, stringent approval rules, and OMB standards around compensation.**

- **Time.** The necessary materials for an Information Collection Request take time to draft, and OMB requires time to review and approve them. The process from start to finish typically takes several months. Project teams described how the process from drafting to awaiting approval can delay them in engaging community partners.
- **Required advance planning.** Project teams described needing to determine the project work plan, approach, and protocols far in advance of data collection to get an Information Collection Request package approved by OMB. This advance planning meant project teams were making decisions before being able to engage and include community members in key decisions.
- **Stringent approval rules.** Not only must teams plan in advance, but once plans are approved, teams may not change approved procedures without a formal amendment. Amendments take additional time to draft and to be reviewed and approved by OMB. The additional time and effort create a disincentive for project teams to modify procedures even when their preference is to adapt project plans as needed to be responsive to community members' input.
- **Compensation.** Some project teams found rules about compensation and how OMB determines acceptable amounts challenging. In particular, compensation in community-engaged work raises questions about equity: How much should community members who bring expertise to a project through their lived experience be compensated? And how should that amount compare to the amount federal offices pay people with technical expertise? Several project teams noted that it was challenging to interpret federal requirements and OMB procedures related to compensation for individuals with lived experience.

# Guidance for a Federal Office from the CAMPE CAB

Individual research projects can use community-engaged methods to strengthen all aspects of a research project, from study design to reporting. Community-engaged methods also can be employed to strengthen multiple research processes across an agency or office. The CAMPE project is an example of how community engagement can go beyond informing a single research project. The project created a CAB to inform the research tools and processes of OPRE.

In this section of the report, we provide an overview of the CAMPE CAB and summarize its recommendations for materials and processes to make OPRE research more responsive to the needs and interests of those who participate in ACF programs and studies. We also share recommendations provided by other content and methodology experts who joined discussions with the CAB to provide a deeper understanding of tasks and materials. Finally, we offer lessons learned from engaging people with lived experience in this kind of work. While these recommendations and lessons are all based on the review of materials and project examples provided by OPRE, the approach and insights may be applicable to other federal agencies and staff looking to incorporate community engagement more systematically into their work.

## CAMPE CAB Engagement Goals and Process

A CAB is a group of people from one or more communities (defined by identity, experience, and/or geography) that provides expertise based on its members' lived experiences as members of their communities. The goals of the CAMPE CAB, as facilitated by a team of Urban staff, were the following:

- provide OPRE staff with the opportunity to learn from CAB members' firsthand experiences
- document best practices for community engagement in multiple research activities through the development and facilitation of a CAB
- generate input and guidance to improve the quality of research tools and procedures, including surveys, informed consent procedures, a style guide, and a learning agenda
- build CAB members' understanding of federal research processes

OPRE's role included selecting and sharing materials with CAB members and engaging with the CAB at the start and end of each task. OPRE staff provided relevant background and information about each task at the start and received a summary of the CAB's input and recommendations directly from the CAB at the end. Urban facilitated meetings during an 18-month period and translated the CAB's

feedback and critiques into recommendations and suggestions for revisions to documents. The CAMPE CAB reviewed four components of OPRE’s research tools and processes:

1. the **OPRE Editorial Style Guide**, an internal document that outlines best practices and guidance for language, grammar, and word use as well as visual design and formatting in OPRE-sponsored research and evaluation products
2. the **Welfare and Family Self-Sufficiency Learning Agenda (WFSSLA)** (OPRE 2023), which the Office of Family Assistance and OPRE’s Division of Economic Independence jointly developed, a document that synthesizes previous research and identifies outstanding questions regarding how Temporary Assistance for Needy Families and other human services programs can best support economic well-being for children and families with low incomes
3. **sample informed consents** from two OPRE studies, which include the steps researchers take and the language they use to inform people of their rights, risks, and benefits when choosing whether to participate in a research study
4. **sample survey questions** from one OPRE study survey that was administered to adults who had participated in interventions to help them navigate employment challenges and achieve economic stability

Engagement on each of these four tasks began with an introductory overview of the type of product or process and a session with the CAMPE federal project officers and other relevant OPRE staff to explain their goals for the CAB’s review. Following this groundwork, the CAB members reviewed all materials in homework assignments, group sessions, and one-on-one conversations with Urban team members and compiled reflections and recommendations for submission to OPRE. CAB members generally met twice per month, and each had a monthly check-in with a member of the Urban team designated as their CAMPE “buddy” throughout the engagement. In these check-in meetings, Urban team members presented essential background information about the content and structure of the engagements, answered questions, and provided guidance to help the CAB members better understand the purpose of the engagement. We provide more detail about this process below.

#### EXPERTS ENGAGED IN THE CAMPE CAB ENGAGEMENT TASKS

The CAMPE project included input from individuals with a wide range of expertise—including CAB members who brought a mix of personal and professional sources of expertise and researchers who have professional expertise on specific topics or research methodologies.

The CAMPE CAB included 13 members from different regions of the United States (Northeast; Southeast; Midwest; Southwest; and West, including Alaska) with various perspectives, experiences, and identities (Ano et al. 2024). All CAMPE CAB members had experience with ACF programs and topic areas, including employment training programs, refugee resettlement, child support, Temporary Assistance for Needy Families, and human-trafficking programs. Some members brought both personal lived experience and experience as service providers working in these program areas.

The OPRE staff's and the CAMPE federal project officers' expertise and involvement were an important component of the engagements with the CAB. CAMPE federal project officers, Division of Economic Independence leadership, members of the WFSSLA team, and other relevant OPRE staff joined select CAB sessions. In the sessions attended by CAMPE federal project officers, the officers introduced the document presented to the CAB for feedback, explained how the document was used in OPRE's research and why OPRE was seeking the CAB's feedback, and described what OPRE was hoping to learn through the CAB's engagement. Finally, at the end of each engagement task, the CAB presented its recommendations to the CAMPE federal project officers and relevant OPRE staff. This presentation provided an opportunity for CAB members to personally share their recommendations, answer any OPRE staff questions, and clarify or expand on any of their recommendations as needed.

In addition, several research experts were invited to join CAB sessions to present on specific topics relevant to the ongoing engagement. These presentations fostered deeper CAB discussions and recommendations about the engagement tasks at hand and provided CAB members with the background information and context needed for them to feel comfortable with the materials and their role in the review process.

Both Urban and OPRE developed commitments to the CAB to ensure CAB members were integrated into the work as collaborators. CAMPE federal project officers committed to sharing with the CAB what OPRE would do with their input and recommendations, including specific steps OPRE would undertake to incorporate them into new or adapted products and processes. Urban also made commitments to the CAB members to provide professional development opportunities (e.g., speaking engagements, résumé building, conferences, networking) to bring their lived experience to research during and after the main project tasks.

## **CAMPE CAB Engagement by Task**

The following section offers a summary of each CAB engagement task. We first provide a brief description of the OPRE document or process being reviewed and the goals for the engagement. We

then summarize the review process and the CAB's key recommendations. The recommendations for each engagement were the result of discussions that included various sources of expertise, including CAB members with lived experiences, OPRE staff members, external research experts, and Urban staff.

## OPRE Editorial Style Guide

### WHAT IS A STYLE GUIDE?

A style guide is a set of standards set forth by an organization for the writing, formatting, and design of materials (publications, reports, websites, presentations). A style guide is used to promote consistency, accessibility, and clarity across all materials published by the organization.

OPRE's dissemination team developed an editorial style guide for use by OPRE staff and contractors, closely based on ACF's Style Guide. The OPRE Editorial Style Guide outlines best practices and guidance for language, grammar, and word use as well as for visual design and formatting in products developed as part of OPRE-sponsored research and evaluation.

### GOALS OF REVIEWING THE STYLE GUIDE WITH THE CAB

The primary aim of this engagement was for members of the CAB to provide feedback and guidance as individuals with lived experience to ensure that the style guide was grounded in the realities of ACF program participants. This feedback was centered on three main areas of OPRE's style guide: word/language choice, visuals, and accessibility.

### ENGAGEMENT PROCESS

The Urban CAMPE team and CAB approached the OPRE Editorial Style Guide engagement in three phases: (1) understanding the OPRE Editorial Style Guide's content and purpose, (2) drafting and refining a memo of the CAB's recommendations for the OPRE Editorial Style Guide, and (3) reviewing all final recommendations and debriefing and documenting the process surrounding this CAB engagement. To familiarize the CAB with style guides, the Urban team compiled several examples of equity-based style guides and presented these along with additional background materials regarding style guides to the CAB members.<sup>22</sup>

OPRE staff responsible for the OPRE Editorial Style Guide, along with CAMPE federal project officers, provided an overview of the history and purpose of the document, answered CAB members'

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<sup>22</sup> One of the key examples of an equity-focused style guide provided to the CAB is the Health Equity Style Guide, available at [www.canceriowa.org](http://www.canceriowa.org) (accessed September 30, 2024).

questions, and flagged certain aspects of the style guide about which they were eager to receive the input of people with lived experience. Two Urban experts provided overviews of best practices on data visualizations and accessibility as well as equity considerations for communications work broadly.

## CAB REFLECTIONS

CAB members reflected on how important it was for them to consult with the Urban and OPRE dissemination and style guide experts as many CAB members were not familiar with style guides. They found these initial discussions were a necessary first step to being able to engage thoughtfully in the review. CAB members appreciated how the Urban team consistently carved out time at the start of each engagement for the CAB members to familiarize themselves with the new material to ensure the CAB was prepared to conduct its reviews and provide actionable recommendations. Finally, CAB members appreciated the opportunity to present on their final reflections in a live session with the CAMPE federal project officers rather than only submitting the final written memo. The session allowed the CAB members to ask final questions and for the program officers to react and engage in an interactive discussion that would be possible only through real-time conversation.

## RECOMMENDATIONS

Based on the review of the OPRE Editorial Style Guide, discussions with various style guide experts (from the OPRE dissemination team and Urban communications department),<sup>23</sup> and facilitated discussion sessions with the Urban CAMPE team, the CAB offered the following recommendations.

### *Terminology used in the style guide*

- **Create or expand definitions and examples of terms related to equity**, such as “culturally responsive research” or “community.” One CAB member suggested adapting a definition of community from their work with US Department of Health and Human Services’ Office on Trafficking in Persons: “A formal or informal group with a shared interest that could be defined by a shared characteristic such as geography, race or ethnicity, a shared medical diagnosis, or a combination of characteristics (e.g., a neighborhood in a city, an online community of individuals affected by cancer, or a racial subgroup in a city).” Based on this example, the CAB offered the following streamlined definition: “A group of people with diverse characteristics who are linked by social ties, share common perspectives, and engage in joint action in geographical locations or settings.”

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<sup>23</sup> Jon Schwabish, data visualization expert from the Urban Institute.

- **Review style guide content to ensure use of inclusive language** that is respectful of identities and experiences (i.e., “people first” language such as “people with disabilities” or “people with low income”), does not overgeneralize or exclude certain experiences (i.e., avoiding “the poor,” which does not reflect that many people move in and out of poverty and that there is a wide diversity of experience among people living in poverty), and avoids stigmatizing or blaming individuals for circumstances that are structural or systemic (i.e., “high-risk youth” or “hard to employ”).
- **Include guidance that encourages projects to select terms that reflect the preferences of the community of focus.** If there are differences in opinion, ask that researchers state those differences and the reason(s) for selecting one term instead of the others (i.e., individuals and communities differ in their preferences for the terms “Indigenous,” “Tribal,” and “Native American” and “Latino/a,” “Latine,” and “Latinx”).
- When revising or selecting new terms to include in the style guide, **encourage researchers to be as specific as possible** (i.e., not using “people of color” if the study is focused on a specific racial group). Researchers should be transparent about their choices and thoughtful about the sources used to make these terminology decisions.

#### ***Visuals and accessibility of the style guide***

- Define and explain technical terms surrounding visuals and accessibility (e.g., “hex codes” and “dpi”).
- Make the style guide more interactive with visuals, questions for guide users to ask themselves to come to sound style decisions, or examples.
- Ensure that the guidance provided is consistent and is applied to the guide itself.
- Provide detail about presenting tables and other visual figures as the style guide provided no guidance about how to label tables and figures or the use of gridlines.
- Offer consistent branding guidance and easy-to-use templates.
- Make sure all guidelines follow accessibility standards (e.g., not using red and green, being screen-reader friendly).

#### ***Structure and organization of the style guide***

- Make clear at the beginning of the style guide the purpose and intended audience of the style guide.

- Many of the terms and guidelines require careful consideration of equity. Include callout boxes with examples or questions for guide users to ask themselves to help draw users' attention to these equity considerations.

#### ***Future reviews of the style guide***

- Create a schedule for regularly reviewing the style guide every few years to keep it up to date and relevant. *Engage a communications expert focused on equity* to do a deep review of the style guide and other sample OPRE products and then help build out the recommendations. *Convene a standing CAB* that is embedded in OPRE that could do a more thorough review of the style guide and other OPRE practices and processes.
- In the guide's References section, update older sources and add resources/links to provide additional support.
- *Develop population-focused style guides for the communities at the heart of OPRE's work*, and include communications experts, researchers, and people who identify with the focal community on the style guide's development team.

## **Welfare and Family Self-Sufficiency Learning Agenda (WFSSLA)**

### **WHAT IS THE WFSSLA?**

In the federal government, learning agendas flesh out research questions and activities that guide an agency's evidence-building and decisionmaking practices.<sup>24</sup> A learning agenda includes (1) a set of questions addressing critical knowledge gaps, (2) a set of associated activities to answer them, and (3) products aimed at disseminating findings and designed with usage and application in mind.

The WFSSLA “jointly developed by OPRE’s Division of Economic Independence and the Office of Family Assistance (OFA), guides the development and execution of the Division and OFA’s activities to learn how TANF [Temporary Assistance for Needy Families] and other human services best support the self-sufficiency and economic well-being of children and families with low incomes” (OPRE 2023).

### **GOALS OF REVIEWING THE WFSSLA WITH THE CAB**

The CAMPE project sought to incorporate input from people with lived experience regarding research priorities to ensure that the Division of Economic Independence’s research and evaluation efforts

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<sup>24</sup> Evaluation.gov, “Learning Agendas,” accessed September 30, 2024, <https://www.evaluation.gov/evidence-plans/learning-agenda/>.

reflect their interests and needs. Urban solicited input from the CAB on research questions and activities of importance to their communities, recommending priorities for OPRE to consider incorporating into the WFSSLA. Urban facilitated sessions with the CAB to identify and rank key research priorities and highlight gaps and potential biases in the research priorities already articulated in the WFSSLA.

## ENGAGEMENT PROCESS

As with the OPRE Editorial Style Guide, Urban structured the engagement so that CAB members first learned about the purpose and contents of learning agendas broadly and then discussed OPRE's goals for the CAB's review of the WFSSLA. CAB members then completed several assignments and group sessions to generate recommendations that were then presented and discussed with the CAMPE federal project officers. The WFSSLA is arranged by workstreams, or topical areas of learning. Urban focused the WFSSLA engagement on a specific workstream—strategies for advancing positive participant outcomes—since it was most relevant to the CAB members' lived experience. This workstream is divided into the following four subworkstreams: human capital development, employment attainment and retention, social service delivery systems, and social context and environment. CAB members provided recommendations for these four subworkstreams.

During this engagement, the project officers and Urban experts joined the CAB sessions to provide members with the background, context, and grounding necessary to begin their review of the WFSSLA. Urban experts on research methods and federal learning agendas provided an overview of research design processes, developing research questions, and key points from an Urban tool kit on federal learning agendas.<sup>25</sup>

## RECOMMENDATIONS

In their review of and group discussions about the WFSSLA, CAB members suggested specific edits to the language or phrasing of certain learning questions, identified gaps in the kinds of questions asked, and offered larger reflections on the framing or goals of learning questions or subworkstreams.

The following are some of the key reflections and recommendations from the CAB:

- **Consider the perspectives from which the learning questions are framed.** For example, many of the questions in the WFSSLA subworkstream on employment attainment and retention

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<sup>25</sup> Debra S. Nightingale, Keith Fudge, and Will Schupmann, "Evidence Toolkit: Learning Agendas," Urban Institute, March 22, 2018, <https://www.urban.org/research/publication/evidence-toolkit-learning-agendas>.

appear to be asked from the vantage point of an employer rather than an employee. The interests of both groups are important, and they often are distinct.

- **Consider context and history.** CAB members shared that the “learning to date” sections of the WFSSLA were often missing critical aspects of context or history that could inspire different learning questions and provide the information necessary to analyze the findings from research and evaluation projects. The “learning to date” sections are included in each WFSSLA workstream and synthesize findings from previous research funded by OPRE and other select federal agencies on the workstream topic. As examples of additional context that could be included to help inform future research, the CAB named community cultures or norms and the history of stigma associated with participation in social services programs.
- **Focus on access to programs, not just outcomes.** The CAB shared experiences and examples of various challenges to accessing programs that it felt should be a greater priority in the WFSSLA. The CAB suggested that the WFSSLA reflect an understanding of the challenges to accessing programs, which could have implications for program structure or implementation. Accessibility challenges also might contribute to certain subgroups of eligible individuals not participating in a program. Finally, capturing the full extent of accessibility challenges could provide some understanding of the change and/or differences in outcomes for different populations.
- **Focus on job quality, not just job attainment.** CAB members felt that the WFSSLA should include learning questions that attempt to capture more information about the kinds of jobs and quality of jobs (e.g., salary vs. hourly, opportunities for career growth meeting employee goals and preferences) obtained by program participants rather than being focused primarily on general job attainment.
- **Focus on participants’ on-the-ground experiences of programs.** CAB members recommended that the learning questions consider the quality of program participants’ experiences in programs, not just their outcomes or achievements. CAB members shared that when participants have negative experiences with programs, those negative experiences can then affect their outcomes and/or may cause them to stop participating in the programs altogether. Understanding participant goals and preferences as well as potential challenges to participation would help ensure the programs are better designed to be responsive to these factors and may lead to better outcomes.

## Informed Consent

### WHAT IS INFORMED CONSENT?

Informed consent is an ethical and legal requirement for research involving human subjects. The core components of ethical informed consent are outlined in *The Belmont Report*, developed by the National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research.<sup>26</sup> Research subjects can give informed consent either verbally or in writing. Informed consent should aim to offer or achieve the following:

- information (this includes details about the research procedure and the risks and benefits of participation)
- comprehension (information must be provided in a manner and context consistent with participants' intelligence, rationality, maturity, and language)
- voluntariness (participation is free from coercion and undue influence)

### GOALS OF REVIEWING INFORMED CONSENT WITH THE CAB

The CAMPE project engaged the CAB in reviewing an example informed consent script and the written processes for obtaining informed consent from participants related to one Division of Economic Independence evaluation. The CAB provided suggested edits to improve the clarity and accessibility of the informed consent forms and administration procedures, drawing from members' lived experience to ensure that the informed consent script reflects the realities of ACF program participants. Specifically, the goals were to develop the following:

1. generic informed consent language that could be used in Division of Economic Independence evaluations
2. guidance for adapting the generic language based on the study context and population
3. guidance for administering informed consent

### ENGAGEMENT PROCESS

The CAB informed consent engagement consisted of presentations from research experts (discussed below), discussion about the content of the example informed consent, and piloting of the revised informed consent materials with a small number of individuals in their personal or professional

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<sup>26</sup> US Department of Health and Human Services, *The Belmont Report*, October 17, 2022, <https://www.hhs.gov/ohrp/regulations-and-policy/belmont-report/index.html>.

networks.<sup>27</sup> Division of Economic Independence staff joined the first session to present their existing informed consent procedures from two research projects. CAMPE federal project officers were joined by an OPRE privacy analyst with expertise on the Privacy Act<sup>28</sup> as well as a research analyst in the OPRE Division of Data and Improvement to discuss existing requirements and guidelines around interactions with research subjects. OPRE staff shared that they recognized the “importance of accessible, transparent, and meaningful consent language” and wanted to understand if typically used consent forms used language that met this criterion. The Urban team invited various research experts to join the CAB sessions. These experts included leadership from the Urban Institute’s institutional review board and one of the lead authors of Research Ethics Training for Health in Indigenous Communities, a curriculum on research ethics designed to train researchers conducting research led by or with Indigenous communities, available from University of Washington (Pearson et al. 2019). Including these research experts in the CAB sessions provided the group with a clear understanding of research ethics and the role of the informed consent process.

As part of homework assignments and group sessions, CAB members reviewed the informed consent materials and provided suggested edits. CAB members also engaged in one-on-one conversations with their assigned Urban buddies when they had additional questions, had input, or missed one of the group meetings. After an initial set of edits to the informed consent materials generated by the group, several CAB members piloted the sample informed consent section with individuals in their personal or professional networks or with their Urban buddies. The piloting experience generated a second round of suggested edits that were incorporated into the final informed consent recommendations memo. CAB members commented that the piloting experience was essential to their ability to provide deeper recommendations to improve the informed consent language and process.

## RECOMMENDATIONS

The following recommendations emerged from the CAB’s informed consent engagement. More detailed recommendations, including examples of language-specific edits and strategies for implementing the recommendations, are included in the CAMPE CAB informed consent engagement recommendations memo (Farrell et al. 2024).

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<sup>27</sup> The piloting was not subject to the Paperwork Reduction Act as the CAB members spoke to fewer than nine individuals.

<sup>28</sup> 5 U.S. Code § 552a (2024).

- **Ensure that the research process is person centered** by using specific person-centered language in the informed consent materials and taking a human-centered approach to implementing the informed consent. Person-centered language emphasizes a person’s dignity and strengths rather than a condition they may face (Hyams et al. 2018). For example, one CAB member shared a hypothetical example of researchers’ going to work with survivors of human trafficking and using terms like “prostitute” to refer to someone younger than 18 rather than using language like “survivor of human trafficking/exploitation.” CAB members also shared that the informed consent process would feel more person centered if researchers took a few minutes to build rapport before jumping into the informed consent and spoke to study participants in everyday, plain language.
- **Clarify the purpose of data collection and consider reducing data collection for undefined future use.** Some informed consent processes seek permission from research subjects to use their data for future, undefined research purposes. CAB members felt that asking to keep detailed and highly personal data for a long period of time and for an undefined future use was unnecessarily invasive and could lead to research subjects’ not consenting.
- **Ensure accessibility** of the informed consent document by providing it in different formats based on the participant’s preference (e.g., preferred language, on-paper versus verbal explanation, virtual or in person).
- **Ensure that the person conducting the informed consent process is well trained on the content covered in the informed consent** so they are prepared to answer questions. For example, one CAB member shared that the individual with whom they piloted the sample consent form had a question about “confidentiality” that the CAB member was not able to answer due to not having enough guidance.
- **Have community members or people with lived experience pilot and implement the informed consent** with potential study participants. Based on their experience piloting the informed consent with members of their personal or professional networks, CAB members felt that implementation of informed consent was most thorough and effective when conducted by someone research subjects could relate to more easily. CAB members thought research subjects would be more likely to understand the content and to ask clarifying questions under these conditions.

## Survey Development

### WHAT IS A SURVEY IN EVALUATION RESEARCH?

A survey is a set of questions provided to research study participants with options for both open- and closed-ended responses. These questions may be focused on one or more topics related to the research study questions. Research study participants typically receive some sort of incentive (e.g., gift card) to acknowledge the time and effort they spend on completing the survey.

### WHICH SURVEY DID THE CAB REVIEW?

CAB members reviewed a sample federal research survey focused on work, compensation and benefits, barriers to work, and education and training program outcomes. This survey was part of an OPRE-funded large-scale research study focused on evaluating promising interventions to help people navigating employment challenges to achieving economic stability.

### GOALS OF REVIEWING THE SURVEY AND SURVEY PROCESS WITH THE CAB

OPRE's goal in engaging the CAB on survey development was to gather general feedback on survey processes, such as recruitment and incentives, as well as specific feedback on select survey measures. The CAMPE project sought to incorporate input from people with lived experience regarding research priorities to ensure that the OPRE's survey processes and measures reflect their interests and needs.

### ENGAGEMENT PROCESS

CAB members received information about the use of survey data and administration of surveys from the same research experts who provided background information about informed consent. CAB members received an introduction to survey methodologies, community-engaged participatory research (so that CAB members could offer recommendations from the point of view of a researcher and/or a research subject), and large-scale longitudinal survey development and implementation. CAB members developed a foundational understanding of the survey process, which helped them to provide feedback about sample survey items. Urban CAMPE team members and the experts invited to join the CAB sessions also reviewed OMB's existing guidance related to developing, administering, and presenting survey data (e.g., OMB Standards for Maintaining, Collecting, and Presenting Federal Data on Race and Ethnicity) and discussed some of this with the CAB.

Following this preparation, CAB members reviewed survey materials during homework assignments, one-on-one sessions with their assigned buddies, and group sessions. In addition, several

CAB members piloted the sample survey section with individuals in their personal or professional networks or with their assigned CAB buddies from the Urban team.<sup>29</sup>

## RECOMMENDATIONS

- **Ensure that the survey language and delivery are person centered**, which may include ensuring a trauma-informed approach to survey delivery. For example, before asking sensitive questions, CAB members recommended that researchers say, “I understand that some of these questions are sensitive, and we appreciate your volunteering your answers with us.” CAB members also suggested training researchers to interact respectfully with survey takers as several CAB members reported participating in past data collection efforts in which the researchers’ tones felt condescending.
- As with the informed consent, **have community members or people with lived experience pilot and implement the survey** with eligible research subjects when possible.
- CAB members made line edits to the sample surveys provided by OPRE. These suggested edits were aligned to the following overarching recommendations regarding survey structure and language:
  - » **Consider ways to streamline survey questions by removing repetitive questions and repetitive framing.** Throughout the sample survey reviewed by the CAB, members found that some questions were repetitive. CAB members thought these questions could be formatted differently so the survey would flow more easily and efficiently, reducing the chance that respondents would feel frustrated or skip questions.
  - » **Include transition statements to ensure the participant is aware that the topic of questions is changing.** CAB members recommended that surveys introduce the next topic to participants so they know what to expect from the next set of questions. Researchers can use this opportunity to remind participants that they can skip any question they do not wish to answer.

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<sup>29</sup> To supplement recommendations provided by the CAB during the survey engagement, several research experts were invited to participate in three consultation sessions. These individuals all had expertise in survey methodology and/or community-engaged surveys. Although these consultations were held separately from the CAB sessions, their recommendations were shared with the CAB for discussion and integrated into the final recommendations. The piloting was not subject to the Paperwork Reduction Act as the CAB members spoke to fewer than nine individuals.

- » **Provide more examples or prompts.** Participants may have questions about what a topic or concept may mean in the survey. Providing examples or prompts can help participants understand and accurately respond to a question.
- » **Provide more guidance about different ways for survey developers to phrase—or for interviewers to ask—questions to ensure participant understanding.** One CAB member shared that some rating scale responses were easier to field and respond to than others. Consider simplifying the responses to plain terms or standardizing the responses for all questions with scale responses.
- » **Consider rephrasing certain terms and framing the survey with a friendlier or more conversational tone.** The CAB recommended that researchers make the survey process more approachable and conversational. One suggestion for how this can be done is to ask open-ended questions, especially for phone interviews, rather than reading out specific answers. For example, if asking about one’s job, researchers could frame the question more broadly, such as, “Please tell me a bit about what you do. How would you describe your job?”<sup>30</sup>
- » **Consider cultural relevance and sensitivity when wording specific survey questions.** The CAB noted that the definitions of some terms are context specific. For example, “college” and “university” can have different meanings depending on the country an individual grew up in. In addition, some mental health terminology and questions can be offensive or translate poorly into languages other than English.
- » **Offer an alternative to answering sensitive questions on the spot, such as mailing the questions to participants after the survey.** CAB members provided this feedback specifically in response to questions in the sample survey regarding arrest histories.

## Helping Researchers Benefit from a CAB’s Expertise

As demonstrated by the CAMPE CAB, CABs can provide in-depth feedback and unique expertise that can inform the work of the federal government. By embedding processes for gathering community input into specific projects or officewide initiatives, federal offices can build in opportunities to receive rich input on a wide range of research and evaluation activities. Because CAB members may have specific lived experience with various government agencies and their programs, CABs can provide nuanced,

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<sup>30</sup> We acknowledge that in some circumstances, asking open-ended questions may alter the nature of the data collection within a project, as these questions may not yield the same type of data that a survey traditionally might produce.

highly relevant perspectives and recommendations. Below are recommendations generated by the Urban team from conversations among CAB members during which they reflected on their overall experience as part of the CAMPE project. These recommendations focus on how federal agencies, offices, or staff can intentionally engage people with lived experience in a way that is mutually beneficial to both CAB members and researchers.

- **Provide the right infrastructure** to ensure that CAB members and federal staff are comfortable with one another and prepared to engage with each other. This process has two key components. The first is to prepare the federal team internally to engage the CAB with respect, transparency, and flexibility. The CAB recommended that federal staff seek to understand both the benefits of including people with lived experience in the research process and the challenges of integrating CAB members into a setting where CAB members may not feel comfortable. Equally important is for the federal team to be prepared to listen to the CAB members and translate or apply what CAB members share from their lived experience into the federal team's work. The second component is onboarding the CAB. A long runway for onboarding that gives federal staff and CAB members several months for relationship building, norming, and getting comfortable with each other can facilitate a smooth beginning to the work together. In addition, the CAB recommended that the onboarding provide a clear description of the kinds of input the CAB will be asked to provide. Working with the CAB will likely include federal staff's translating the federal landscape and project work to the CAB and translating the CAB's input into recommendations that fit the office's or project's needs. The CAB indicated that building this type of infrastructure gives CAB members and federal offices the best opportunity to work together in a way that is mutually beneficial.
- **Allow flexibility** in the work plan, approach, and processes for engaging the CAB. For the CAMPE CAB, the Urban team was able to keep all 13 members engaged over 18 months and collect more valuable input by being flexible in the opportunities for CAB members to provide input. Rather than asking CAB members to step down from the project if they missed a certain number of meetings, Urban created alternative opportunities for engagement through written input and one-on-one meetings with assigned Urban buddies. CAB members contributed differently and in varying amounts throughout the period of engagement.
- **Invest in relationships** to get to know the CAB members outside of the specific project tasks, and offer them opportunities for professional development. For example, the Urban team shared speaking opportunities at conferences and meetings for which CAB members could sign up. Doing this helps ensure that there is benefit for CAB members beyond just compensation.

CAB members are often sharing very personal aspects of their lives to contribute to stronger research, and experiencing an investment in their personal and professional growth can allow them to engage more deeply with the project tasks and content.

- **Commit to sharing** the use and impact of the CAB's work with CAB members as decisions and/or progress is made. While the work may appear to be finished once the CAB tasks are completed, the implications of that work can take months and sometimes years to be fully realized. A deep investment in working with CAB members as partners means continuing to share new developments over time.

## Conclusion

When people with lived experience are engaged as experts in federal projects rather than engaged solely as research subjects, they can strengthen all phases of the research, including informing study questions and processes, designing data collection tools and enhancing data collection protocols, and ensuring final products are consistently accessible and respectful in their communication style.

The CAMPE project's environmental scan and work with the CAB demonstrated that meaningfully engaging people with lived experience in federally funded research is possible and valuable. Many federal research projects have found ways to engage people with lived experience, capitalizing on supportive aspects of the federal research context and navigating its challenges. CAMPE's approach to convening a CAB was grounded in relationship building and reciprocal learning, leading to novel insights for OPRE's research processes and guidance documents, and can serve as an example for future engagement of people with lived experience in federal research.

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## STATEMENT OF INDEPENDENCE

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