



Elevating Customer Engagement

STARTING A COMMITTEE/GROUP



chwd.org/CACguide

Think about... 🤔

WHO

- Everyday people
- Community leaders
- Business people
- HOA board members
- Community group members
- Public agency partners
- Media and citizen journalists

WHAT

- Advisory or academy model
- Size of group
- Responsibilities
- Subject matter(s)

WHEN

- Frequency
- Time of day
- Day of week

WHERE

- Your boardroom
- Community center
- Tours

WHY < *This is the most important!*

- Customers feel connected
- Board members get valuable feedback
- Staff can vet concepts and ideas

Seek Counsel 🙋

- Brown Act body
 - Quorum
 - Posting
- Enabling ordinance/resolution
- Training requirements
 - AB 1234
 - Sexual Harassment Prevention
- Compensation models
 - Form 700

Market It 📣

- Direct outreach
 - Email active/engaged
 - Website information
- Referrals
 - Staff
 - Board/community leaders
 - Past participants
- Digital outreach
 - Social media targeting
 - Advertising



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CONSIDERATIONS FOR A COMMITTEE/GROUP



- Who needs to be involved?
- Who is covering logistics?
- Are you planning for the full year/program?
- Are you using a third-party facilitator?

PLANNING

- What is your primary objective with the session?
- Is the content too technical or detailed?
- What activity/engagement could you insert?

CONTENT

- Are you thinking about accessibility?
- Do you need equipment?
- Have you checked equipment?
- Who needs mics?

AUDIO-VISUAL

- Are you meeting during a mealtime?
- Have you thought about dietary restrictions?
- Is the food selection sending the right message?
- Do you have good, reliable vendors in place?

FOOD

- Do participants have calendar invites?
- Are you emailing them a reminder?
- Do they know the agenda in advance?
- Do you have an email multiple staff can access?

COMMUNICATION

- Are you encouraging participants to engage?
- Are you bringing in third-party experts to speak?
- Who from your staff is expected to attend?
- How are Board Members included?

PARTICIPATION