

Regional Plan Update Proposal: Process Design

Metropolitan Area Planning Council (MAPC) Regional Plan Update

June 18, 2018

Executive Summary

The Metropolitan Area Planning Council (MAPC) adopted its current regional plan, “MetroFuture: Making a Greater Boston Region,” in 2008. One decade later, we are now preparing to embark on the development of a new regional plan. MAPC’s two-and-a-half year Regional Plan Update (RPU) will reflect ten years of regional change and anticipate future events and scenarios. Five interdependent, roughly six-month phases will pace the planning process, leading us to robust and achievable implementation recommendations to plan out to 2050. These phases are as follows:

Where do we want to go?

Phase 1: Visioning and groundwork.

This phase will focus on engaging the public to create and affirm an updated vision of MetroFuture for the new regional plan, including 5 – 6 major themes into which the plan will be organized. During this phase, we will also build an RPU digital hub, analyze local comprehensive plans for themes and priorities, and establish baseline data for our region relating to regional challenges and opportunities of each RPU theme. Research addressing policy recommendations for these challenges and opportunities will also begin.

What might help us to achieve our vision or prevent us from reaching it?

Phase 2: Strategic Challenges/Opportunities and Driving Forces.

This phase will focus on talking to the public about the challenges/opportunities the region is experiencing, solutions and interventions that could be used to address them, and driving “disruptive” forces that could impact the region over the next 30 years.

How can we reach the vision?

Phase 3: Scenario modeling.

This phase will take the regional challenges, opportunities, and driving forces, model their potential impacts and the effect of various solutions and interventions out to 2030 and 2050, and engage the public to ascertain what tradeoffs they are willing to make to achieve the vision laid out at the beginning of the process.

What policy recommendations will achieve the vision?

Phase 4: Recommendation Selection.

This phase will propose policy recommendations, test them with the public, and result in a final plan outlining steps to achieve a regional vision that will be submitted to the MAPC Council for adoption and formally released to the public.

Phase 5: Plan assembly and public release.

This phase will focus on the release of the plan to the public and beginning implementation steps.

The plan will be heavily focused on engaging municipal leaders and under-represented groups in the region. Some key engagement strategies to achieve this will include:

- **Plan Update Digital Hub.** Develop a central place on the web to engage with MAPC’s Plan Update. This Hub will contain all research reports and data, events, opportunities to engage online (surveys, visualization, video), key messaging and downloadable materials, and other information that will engage the public around the Plan Update. This will be a living resource, and will evolve over time based on each phase of the planning process.
- **Subregional Structure for Outreach to Local Leadership.** Conduct outreach to municipalities through MAPC’s Subregional Councils and Coordinators. Use this channel to gather “grasstops” feedback about issues that surface during the planning process, to build local networks for content distribution, and to analyze gaps in stakeholder participation. Aim to hold ten subregional Public Roundtables with local stakeholders.
- **Targeted engagement.** Eight focus groups to engage populations determined during the process to be under-engaged.
- **Partnerships.** Identify up to 30 partner organizations to help with outreach and to distribute RPU content to audiences we would not otherwise reach.
- **Champions & Implementers.** Identify up to 45 champions and up to 50 implementers whose engagement will be critical for the overall implementation of the plan.

A full list of engagement strategies to be used in the plan can be found in Appendix A.

Introduction

MAPC’s two-and-a-half year Regional Plan Update (RPU) will reflect ten years of regional change and anticipate future events and scenarios. Five interdependent, roughly six-month phases will pace the planning process, leading us to robust and achievable implementation recommendations. Engagement will be vital throughout the plan to progress through phases and will target a variety of audiences by employing in-person and digital formats. The plan will comprise five to six themes that encompass the region’s most significant challenges and opportunities. MAPC’s Department of Strategic Initiatives (DSI) will oversee the RPU.

In the first phase of the plan, we will define the vision for the region, answering the question, “Where do we want to go as a region?” Second, we will identify and explore challenges and opportunities within each of the themes that we know we must address in order to meet our vision. We will also identify driving “disruptive” forces that could impact the region. In the third phase, we will use scenario modeling to test and explore how challenges, opportunities, and disruptive forces could influence our ability to achieve the vision, as well as the interventions needed to maximize the likelihood that we achieve that vision. Fourth, we will compile recommendations for the region, rooted in research, scenario modeling, local and regional planning priorities, and public opinion. In the fifth and final phase, we will release the plan to the public and embark on implementation.

It is vital that throughout all five phases we remember that the goal of this process is not merely to develop a regional plan, but also to have a regional plan that guides decision-making into the future. Therefore, along the way we will develop a framework for implementation, along with indicators to measure success for the process itself, regional progress toward achieving the plan’s goals, and the implementation of the plan’s policy recommendations. The work of

the RPU will be overseen by a core team at MAPC, an External Advisory Committee, numerous topical committees of subject matter experts, and MAPC's Council, Executive Committee, and Officers.

In order for the RPU to be effective in helping to promote a better future for Greater Boston, the work must speak to the interests of the full range of the region's residents, and it must be implemented by localities and state entities alike. A plan that achieves these things can only be developed through a process that is high profile, that is inclusive of seldom-heard voices, and that is strategic in building support among leaders able to press for the plan's recommendations and put them into effect. A special emphasis will be placed on engaging subregions and municipal decision-makers, as well as under-represented populations. In addition to traditional in-person meetings, engagement techniques like pop-ups at local events, monthly digital content distributions, and a "hack-a-thon" to develop solutions to regional issues will be employed.

This document will provide a description of the process design planning, which has taken place over the past year, along with an overview of the five phases of the plan update. A draft description of community engagement techniques to be employed during the plan can be found in Appendix A.

Process Design Status

Our goal was to have a two-year planning process fully designed, approved, and ready to implement by May 2018. Over the past year, we have kept largely on time, although we are seeking approval about two months behind schedule. We have also decided to recommend a planning process that will take two and one-half, rather than two, years.

The External Advisory Committee (EAC) met six times, beginning in late 2017, and was actively engaged in providing specific recommendations for public engagement, municipal collaboration, and plan content. Its 36 members came from a variety of disciplines, geographies, and backgrounds. Meanwhile, an internal staff advisory committee (StAC) and five subcommittees generated the work streams that comprise the final process design. These committees include:

- Vision, values, and components;
- Research agenda;
- Scenario planning;
- Local plans and priorities; and
- Integrated communications.

Additional working groups under DSI include:

- Evaluation
- Governance
- Implementation

Staff and the external advisors solicited feedback from their networks and constituents about useful content and engagement methods for the updated regional plan. This feedback has been valuable in crafting plan activities.

The StAC and EAC have ratified a set of goals for the Regional Plan Update:

Goals for the Regional Plan

- The vision that emerges from the regional planning process should be shared by the region, including municipalities, key allies and stakeholders, and under-represented populations, such as low-income, minority, and immigrant communities;
- The plan's vision should align with MAPC's values and strategic priorities, including increasing equity, regional collaboration, smart growth, and climate change mitigation and adaptation;
- The plan's goals should be broad, inclusive and bold, yet achievable and measurable;
- The plan should include recommendations that can be implemented by state, regional, or local actors, along with recommendations that could influence the actions of employers, institutions, and residents;
- Recommendations should be presented in such a way that they can be modified and adjusted over time, depending upon changing circumstances; and
- The format of the plan should be accessible and intuitive for a range of stakeholders.

Preliminary Goals for the Agency

- The planning process should expand and strengthen strategic partnerships and collaboration, especially with municipalities and organizations comprising under-represented populations;
- The process will provide opportunities for mutual learning and engagement with policy makers, opinion leaders, allies, and the public; and
- Through the process, MAPC will increase its capacity to deliver technical assistance, to conduct research, improve data collection and modeling efforts, and to design public policy recommendations.

Expected Timeframe and the Five Phases

RPU Launch at MAPC: June 21, 2018

Phase 1: Groundwork and Visioning: June 21, 2018 – December 31, 2018

Phase 2: Strategic Challenges/Opportunities and Driving Forces: January 1, 2019 – June 30, 2019

Phase 3: Scenario Modeling: July 1, 2019 – December 31, 2019

Phase 4: Recommendation Selection: January 1, 2020 – June 15, 2020

Phase 5: Plan Assembly and Public Release: June 16, 2020 – December 31, 2020

Completion Date: December 31, 2020

Phase 1: Groundwork and Visioning (June 15, 2018 – December 31, 2018).

In developing MetroFuture, we started with a blank slate, asking stakeholders, “What do you want to see in our long term future?” With significant civic engagement we were able to create a compelling vision for Metro Boston. For the RPU, we would like to build off our existing MetroFuture vision and its embedded values. We will first update and confirm this vision, comprising 5 – 6 themes, a vision statement, values, and goals, within MAPC. Then, we will engage the public to test this vision at four subregional forums, which will involve local and regional stakeholders from a variety of backgrounds and interests. We plan to include other methods, such as digital engagement techniques, to reach out to under-represented groups and those who are not traditionally active within MAPC’s subregions.

We also plan to build on the extensive local planning work that has taken place at the municipal level. We will review and synthesize 40 Master Plans (developed from 2008 onward) to discern common themes as well as perceived challenges and opportunities. We will also coordinate with communities currently working on Master Plans. These will help to inform not only the visioning process of Phase 1, but also the selection of regional challenges and opportunities, driving forces for scenario modeling, and implementation strategies in subsequent phases. (The concept of disruptive “driving forces” will be introduced in the context of municipal and regional challenges. Driving forces are less predictable, external forces, which are largely beyond the control of local actors.) Later in the process, we will evaluate local planning themes for consistency with the vision. We will also collect top spatial priorities for development and preservation in our 101 cities and towns, which will serve as a data input into scenario modeling.

The public engagement around the vision, combined with the local planning priorities, will result in 5-6 themes for the RPU. We will structure each theme to include a set of regional strategic challenges and opportunities that will be critical to address over the next 30 years. The provisional themes coming out the process design are as follows, although they may well change during the planning process:

1. ***Economic mobility***: Creating the conditions so that all residents have the opportunity for upward economic mobility, with a key goal of reducing racial disparities. This challenge exists at the intersection of education, workforce development, neighborhood development, public safety, economic development, and transportation systems.
2. ***Climate mitigation and adaptation***: Advancing the region toward a net zero carbon future for all residents based on clean energy and healthy built and natural systems, while protecting human health and property in the face of increased flooding and climate extremes. This theme involves energy supply, building efficiency, transportation sector emissions and technologies, green infrastructure, emergency response and recovery planning, infrastructure resiliency, and risk assessments.

3. **Homes for all:** Rectifying the legal, economic, and political challenges that lead to a shortage of housing in the region and an unaffordable housing market. Under this theme, we will explore land use policy, housing finance, incentives and taxation, renter protections, and design.
4. **Smart planning:** Coordinating land use and infrastructure decisions to create a sustainable, livable, and equitable region. This theme entails issues related to zoning, transportation investments and operations, other infrastructure investments, incentives and taxation, and design.
5. **Dynamic government:** Empowering local and regional governments to meet demographic, fiscal, and governance challenges by becoming more dynamic, inclusive and collaborative, across borders and with partners in other sectors. This theme will involve municipal finance, political systems, civic technology, regionalization, and workforce development.

These themes will then be used to inform a vision statement, a set of values, and updated goals for the plan, along with more detailed objectives, which will constitute a final, updated vision for the RPU, to be approved by the Council at the end of Phase 1. MAPC staff will also develop a set of agile indicators to track the region's progress in achieving the goals over time.

A research agenda (in draft form) has been compiled with MAPC staff and external input to understand the biggest issues facing our region. The four categories of the research agenda contain research questions that will be addressed by working groups of MAPC staff and external subject matter experts will be integrated with the final themes; these draft categories are:

1. Equity of Wealth, Health, and Access: Opportunity to Thrive throughout Life
2. Living, Working, and Mobility in the 21st Century: Technology and Trends
3. The Age of Climate Change: Getting to Net Zero and a Resilient Future
4. Institutional Accountability: Governing for Equity, Prosperity, and Sustainability

During Phase 1, we will undertake baseline research to understand the trends surrounding each challenge and opportunity in the region from the past 10-25 years, as well as associated future trends, to help set context for the conversations and decisions that will occur during the remaining phases of the planning process. This will include developing baseline projections for population, households, employment, and land use. This research will also serve to identify implementation strategies and policy recommendations early in the process to support the plan's implementation focus.

A digital hub will be created as a two-way interface with the public both to present content and to gather feedback. It will be interactive and easy to navigate, so the planning process and the plan itself will be digestible and accessible.

The planning process will launch publicly in the fall of 2018. All event information and work products will be available on the digital hub. MAPC engagement and communications staff will also identify municipal distribution networks and launch the plan publicly during this phase.

Summary of objectives that will be completed by the end of this phase:

- Amend the MetroFuture vision statement, based on a set of underlying values
- Create a revised set of goals, objectives, and indicators (for both goals and the RPU process) to measure progress, organized into 5-6 broad themes
- Perform baseline population, household, employment, and land use projections
- Complete the review and analysis of local in a sample of 40 municipalities to determine local trends, common themes, and perceived challenges and opportunities
- Begin research on regional strategic challenges/opportunities within each theme and provide context for driving forces conversations, plus relevant implementation policies
- Lay groundwork for public engagement, including identifying municipal distribution networks, building a digital hub, and announcing the planning process externally with a fall 2018 launch

Phase 2: Strategic Challenges/Opportunities and Driving Forces (January 1, 2019 – June 30, 2019)

During this phase we will explore the nature of the region's strategic challenges and opportunities to establish an understanding of what is happening around us. We will compile a list of key challenges and opportunities within each of the 5 – 6 themes that we will need to address in the plan. We will engage the public around these specific topics and solicit their ideas for addressing the challenges and taking advantage of the opportunities in order to achieve the vision and goals established in Phase 1. We will also supplement these conversations with research on trends from the prior phase.

The concept of disruptive “driving forces” will be introduced in the context of municipal and regional challenges. Driving forces are less predictable, external forces, which are largely beyond the control of local actors. For example, transformations in transportation technologies and the changing nature and structure of work are examples of trends that could affect the region's future, yet the precise nature and impact of these trends remains quite uncertain. We will gauge public opinion on what major driving forces have the potential to sweep the region over the next 10-30 years and compile a final list.

Once the driving forces are decided upon, research will continue to understand the impact they could have on the region, and how they might deflect us from achieving the vision and goals of the RPU. We will discuss and evaluate potential intervention strategies and policy levers that could be enacted to avoid this deflection and achieve the vision and goals. Once we understand the potential changes we are facing and some of their potential solutions, both from known strategic challenges/opportunities and driving forces, we can move into scenario modeling in Phase 3.

After the planning process is complete, and throughout implementation, we aim to monitor the driving forces to determine whether they are coming to fruition and to what degree. This will help inform the applicability of recommendations contingent upon certain driving forces as implementation progresses.

Summary of objectives that will be completed at the end of this phase:

- Initiate regular outreach with the public, distributing research findings and other regular content and surveys, plus quarterly press events (to continue throughout the remainder of the plan)
- Engage the public to explore and then finalize strategic challenges and opportunities within each theme, as well as driving forces, and begin identifying possible solutions
- Complete research on driving forces and their potential effects to inform scenario modeling and additional research, as well as possible interventions that would alter their course
- Develop a monitoring plan for driving forces over time

Phase 3: Achieving the vision despite uncertain events: Scenario modeling (July 1, 2019 – December 31, 2019)

Scenario planning is an essential part of today's regional planning process. For MetroFuture, we used a "normative" approach, which examined different strategies for managing land use, transportation investments, and other aspects of development, and then estimated the impacts of these alternative strategies. MetroFuture participants were provided with the tradeoffs associated with different approaches to growth and development, and then selected a scenario that best fit their hopes and dreams for the region. More recently, some planning agencies have used an "exploratory" approach, which considers driving forces and assesses their impacts on the region's future.

We plan to employ a hybrid scenario modeling approach that combines normative and exploratory modeling. This means we will analyze the impact of different policies and interventions on the region, both quantitatively and qualitatively, and take into account driving forces at the same time. The modeling will result in outputs that will be evaluated and documented. These outputs will tell us what would happen if driving forces turn into reality, as well as what effects various interventions would have on the regional challenges/opportunities in the face of those driving forces. The goal will be to understand what policies and interventions we need to use to address the strategic challenges/opportunities, in the face of driving forces, to stay on course to realizing our vision.

A two-horizon time frame will be used for modeling: 2030 and 2050. This will allow us to assess mid-term actions that will be required by 2030 to keep us on the trajectory to achieve our 2050 vision and goals.

The outputs of the scenario modeling will be presented to the public in the next phase.

Summary of objectives that will be completed at the end of this phase:

- Complete research on policy and interventions to address regional challenges, opportunities, and driving forces identified in the prior phase, which will serve as model inputs and help lead to recommendations for final implementation strategies
- Integrate local zoning and priority development area data from local plan review into scenario models as applicable

- Perform scenario modeling and document and evaluate the outputs

Phase 4: Recommendation Selection (January 1, 2020 – June 15, 2020)

Once modeling of scenarios is complete, we will present the potential outcomes to the public to understand the tradeoffs they are willing to accept in order to make the region most likely to achieve the vision of the RPU. This will be informed by a list of potential interventions that were researched in Phases 2 and 3. The outcome of this engagement will be a list of recommendations that are both contingent (dependent on certain driving forces) and robust (able to be implemented despite driving forces). Most of these recommendations will be public policy suggestions, although some may also relate to actions that can be taken by private sector actors or even individual households, residents, or workers.

Recommendations will also arise from local plan reviews, policy research, and best practices research. MAPC staff will compile a final set of recommendations by taking into account all of the aforementioned sources, including public input. This will be an iterative process.

We want this plan to be implemented, and this presents a challenge for a regional agency that lacks regulatory authority. That's why the approach we use to build the plan and the strategies for implementation are so important. Bringing key actors who can effect change into the planning process will be critical. We have already begun this through the EAC and extensive stakeholder conversations. By setting a two-stage time horizon (2030 and 2050), we will be able to create shorter-term and longer-term goals and strategies. We plan to develop recommendations in numerous ways:

1. By sectors or responsible parties, so each stakeholder sector can easily find the recommendations relevant to them;
2. By topical area and by strategic issue, whenever possible, seeking implementation commitments during the planning process;
3. Through public engagement that will encourage buy-in with the recommendations; and
4. By revisiting local planning themes to flag any consistencies or inconsistencies that may help or hinder implementation.

As recommendations are compiled, a method to track their implementation will be developed. The digital format of the plan will allow us to update the recommendations and indicators as needed over time.

Summary of objectives that will be completed at the end of this phase:

- Present scenario modeling results to the public to understand the potential impacts of driving forces, and determine both the tradeoffs they are willing to make and the interventions and policy decisions they are willing to support to address strategic challenges and opportunities
- Compile implementation research results and conduct public engagement around interventions and policies to determine final set of plan recommendations that achieve regional vision

- Engage with the public and review local planning priorities to test recommendations and refine as needed
- Develop final indicators to track plan implementation

Phase 5: Plan Assembly and Public Release (June 16, 2020 – December 2020)

The finalized plan recommendations will be built into the RPU digital hub. The digital format will also ensure that policy recommendations can be adjusted over time as some recommendations are adopted or as circumstances change. The plan will be publicized broadly and released to the public at a final event.

One of the most impactful outcomes from MetroFuture was the growth of MAPC and its ability to provide technical assistance and policy guidance in a wide range of new areas, including arts and culture, clean energy, public health, and public safety. While the new plan will be for the region as a whole, and will include implementation recommendations for a variety of stakeholders, it will once again be used to guide the work of MAPC. During the plan update, we will establish a firm connection between the day-to-day work of MAPC staff and the goals of the plan to ensure maximum implementation and alignment of MAPC's goals with those of plan, especially as we update our organization's strategic plan, which will probably happen once the RPU is complete. Before implementation begins, methods will be developed to track the extent to which the plan is being implemented and, wherever possible, the impact of implementation on the region.

Summary of objectives that will be completed at the end of this phase:

- Publish plan contents to the RPU digital hub website
- Develop implementation indicators and release the final plan
- Work with implementation partners to take action
- Launch the plan publicly via the media and launch event(s)
- Ensure consistency between RPU and MAPC's workplan

All phases: activities occurring throughout the duration of the plan

During the entire planning process, implementation of the plan's goals through a series of actionable recommendations will be a main focus. Thus, the planning team will build outside partnerships and champions of implementation who are ready to hit the ground running with implementation strategies. This will be achieved with frequent engagement throughout the plan.

The RPU vision will serve as a prototype throughout the process to drive research, scenario planning and the development of recommendations, which means it will be adjusted throughout the plan based on public feedback to ensure the plan is truly meeting the needs of the region. The Department of Strategic Initiatives (DSI) will develop a process evaluation framework that RPU working groups will use to evaluate their progress as they plan. Lastly, DSI will maintain a governance structure for the plan through which decisions are proposed, deliberated and approved.

In general, major decisions and the adoption of documents or segments of the plan will be approved in the following order: MAPC RPU project team, Director of DSI, Executive Leadership, EAC, Officers, Executive Committee, and MAPC Council. Most of the day-to-day decisions will be made by the project team and director of DSI. More important decisions will be made at higher levels, with the most critical, such as adoption of the plan, made by the full MAPC Council. Over the summer of 2018, we will anticipate the significant decisions to be made through the planning process and determine which body of decision-making authority should be the final stop.

KEY MEANS OF ENGAGEMENT – SUMMARY

Our proposal targets the audiences MAPC must inform, hear from, and sway; it reaches each group “where they are” – by various means, with multiple levels of possible engagement, and with content pitched to different degrees of interest and previous knowledge. The proposal is specific in the ways we will reach audiences, but it is intentionally open about the actual content that will be conveyed and the varied, innovative, delightful, and resonant ways in which we hope to convey it. Our proposal is a map of paths rather than a description of what will travel along them.

The key means of engagement we propose are:

- **Media.** As planned with the assistance of an outside consultant, extensive and frequent coverage in traditional press, earned and paid, inclusive of social media. Use proactive and reactive press pitches, strategic relationship-building with members of the media. Pursue reactive press opportunities in response to relevant coverage we can tie to the plan update, and submit timely Letters to the Editor and Op-Eds from staff and key partners.
- **Plan Update Hub.** Develop a central place on the web to engage with MAPC’s Plan Update. This Hub will contain all research reports and data, events, opportunities to engage online (surveys, visualization, video), key messaging and downloadable materials, Content of the Month, and other information that will engage the public around the Plan Update. This will be a living resource, and will evolve over time based on each phase of the Plan Update.
- **Traditional Meetings.** Leverage existing MAPC events and meetings – One Open House, eight Council Meetings, four subregional open houses, existing public meetings, and so on – to involve advocates, thought leaders, local leadership, and our partners, enhance engagement with digital tools.
- **Non-Traditional In-Person Engagement.** Sixteen pop-ups (interactive kiosks at external events); one solutions Hack-a-Thon, with in-person and digitally-enabled crowd sourcing of creative solutions; and six public talks held around the region, all live-streamed and recorded.
- **Subregional Structure for Outreach to Local Leadership.** Conduct outreach to municipalities through MAPC’s Subregional Councils and Coordinators. Use this channel to gather “grasstops” feedback about issues that surface during the planning process, to build local networks for content distribution, and to analyze gaps in stakeholder participation. Aim to hold ten subregional Public Roundtables with local stakeholders.
- **Partnerships.** Identify up to 30 partner organizations to help with outreach and to distribute Content of the Month to audiences we would not otherwise reach.
- **Champions & Implementers.** Identify up to 45 champions and up to 50 implementers that are important for the overall implementation of the plan.
- **Targeted engagement.** Eight focus groups to engage stakeholders determined during the process to be under-engaged.

- **Design.** With the assistance of an outside consultant, develop and use a consistent, recognizable, and on-message visual language, used consistently across all in-person & online communication materials.
- **Regular Content Release.** On a regular basis, develop two versions of plan update work-product and requests for input: an in-depth version coupled with an in-depth survey; and a quick, well-messaged, easy-to-grasp, highly engaging form (including short videos) paired with a quick survey. This is the content that will be distributed through all our networks and by all our means, including on the Hub, in kiosks, through social media, etc.
- **Digital Engagement Tools.** Use digital tools, as determined by context, to gather public input, communicate complexity and make decisions online.
- **Evaluation and Process Enhancements.** Use technology tools and strategies to improve how MAPC staff roll out the plan update, from introducing new and effective workflow tools to manage contacts or aggregate feedback, and capture data at every step of the plan update to ensure we can publish internal reports evaluating our reach and impact. This includes aggregating and evaluating data sources through digital engagement strategies, Passive information gathering and mining for research purposes, and implementing an updated CRM system.
- **Assessments.** Bookend the media plan with pre- and mid-stream polling to develop a baseline understanding of our perceptions among grass-top advocates and stakeholders across our region; test messaging; evaluate engagement with metrics and evaluation tools; test messaging/framing.