2025 Delta Research Engagement and Communication Plan Template

Substantive community and stakeholder engagement can improve the performance, and even make or break the success, of some science programs by providing a means of navigating, and responding to, the complex social, economic, cultural, and political settings in which science programs are conducted ([Lavery 2018](https://www.science.org/doi/full/10.1126/science.aat8429)).

This Engagement and Communication Plan template encourages a strategic engagement and communication approach throughout the lifecycle of a research project, enabling scientists to share information as well as receive and incorporate input from stakeholders and other interested or affected parties. Instead of one-way science communication that is reactive or done as an afterthought, making engagement an intentional, long-term process creates a context for mutually beneficial interactions between scientists and the people using their research, such as managers or communities.

Engagement is ideally a two-way exchange of information. In a new effort to improve engagement practices for scientific endeavors in the Bay-Delta, the Delta Science Program is now requiring engagement and communication plans of its awardees within one year of a project’s commencement. It is imperative that the growing Delta Science funding program demonstrate the extent to which science investments attain their project and management goals.

According to Braus (2009), “Strategic communication is a three-element process that involves specific efforts to get the proper **message** delivered using the correct form (**vehicle**) of communication, to the intended **audience**, at the appropriate **time**.” The Delta Science Program is asking researchers to think holistically, well before time of message delivery, to 1) identify the audiences for their work, and 2) purposefully craft project messages and vehicles for delivery that effectively engage with these specific audiences.

## Instructions

This template provides instructions, expectations, and a format for principal investigators to follow when producing their required deliverable for an engagement and communication plan. The template is derived from [Harwell et al. 2020](https://link.springer.com/chapter/10.1007/978-3-030-45843-0_9), “Establishing a Common Framework for Strategic Communications in Ecosystem-Based Management and the Natural Sciences.”

**Column 1. Audiences:** Identify potential users of your research, adding rows as appropriate. With rare exceptions, every project team should consider how to engage the following audiences: management community, academic community, local communities, and Tribal communities. Researchers are strongly encouraged to engage with these and other audiences early to inform potential project outputs, and continue engagement throughout the project to establish relationships, particularly at pivotal points in the lifetime of your project. There is likely to be a broad spectrum of people with different degrees of influence over the work, and people who may be impacted or interested in a research project. One key audience to highlight is the ‘management’ audience because all projects must be relevant to the [**2022-2026 Science Action Agenda**](https://scienceactionagenda.deltacouncil.ca.gov/pdf/2022-2026-science-action-agenda.pdf), so the science should have a strong link to informing management and decision-making in the Delta. The Delta Science Program may invite researchers for an internal presentation with the Science Program, which can include dialogue on how the Delta Science Program can assist with additional outreach and to identify and connect with resource managers and other audiences.

**Column 2. Engagement goals:** Engagement goals should articulate what you hope to achieve by engaging with this audience. Researchers are encouraged to refer to the International Association of Public Participation (IAP2) goals framework. <https://cdn.ymaws.com/www.iap2.org/resource/resmgr/pillars/Spectrum_8.5x11_Print.pdf>

**Column 3. Messages:** What specific messages do you wish to convey to this audience? Messages may take different forms; for example, they may be factual statements relaying information learned through the research, or they may be framed as questions inviting dialogue or input. Messages should be suited to meet the engagement goals articulated in column 2.

**Column 4. Engagement tool or vehicle:** Briefly describe the tools, platforms, or approaches you will use to engage this audience and when. Delta Science Program staff may be able to assist with communication product ideas and development.

**Column 5. Output or outcome**: Briefly describe what specific consequences you hope will arise through engagement with this audience. Outputs refer to products (e.g., an output of a workshop might be a publicly posted video recording of the workshop), while outcomes refer to other types of desired results (e.g., a new partnership or collaboration). Outputs and outcomes should generally align with the engagement goals articulated in column 1.

**Column 6. Metrics:** List specific metrics for your outputs or outcomes that may be used to assess if engagement goals have been achieved.

Add tables as necessary for additional “Project Goals.”

For more information, please contact Dylan.Stern@deltacouncil.ca.gov

For further reading, please see [Harwell et al. 2020](https://link.springer.com/chapter/10.1007/978-3-030-45843-0_9)

# Template

**Project Goal**: Insert Project Goal 1 here. This template can be adjusted to fit your project needs based on the identified project goal(s). If your project has multiple goals, create a new table for each.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Audience**Group(s) to be targeted; be as specific as possible | **Engagement goals**Ask “What are you trying to achieve by engagement for this audience?” | **Messages** What is the message you want to present specific to the audience and goal(s)? | **Engagement tool/vehicle**How and when will you engage with this audience? | **Output/Outcome** What specific output and/or outcome will result? | **Metrics** How will you measure success of the engagement? |
| Delta resource managers and/or regulators[list] | Goal 1: Inform managers of climate change risk perceptions among urban Delta residents.Goal 2Goal etc. | Message 1: Risk perceptions affect how urban residents respond to climate change adaptation initiatives.Message 2: Currently most Delta residents perceive high risks in association with heat but low risks in association with flooding.Message etc. | Presentation to the agency in Month/Year with associated information sheet | Agency workgroup discussions about integrating risk perceptions into communications around climate change adaptation planning | 1. In-presentation poll asking audience whether/how they will use this information2. Informal future check-ins with audience members to ask if/how research was used |
| Academic communities[list] | Goal 1Goal 2Goal etc. | Message 1Message 2Message etc. | Workshop in Month/Year | TBD | Metric 1Metric 2Metric etc. |
| Local Communities [list] | Goal 1Goal 2Goal etc. | Message 1Message 2Message etc. | Workshop in Month/Year | TBD | Metric 1Metric 2Metric etc. |
|  Tribal communities[list] | Goal 1Goal 2Goal etc. | Message 1Message 2Message etc. | Targeted outreach in Month/Year | TBD | Metric 1Metric 2Metric etc. |
| Other communities (add rows as needed) [list] | Goal 1Goal 2Goal etc. | Message 1Message 2Message etc. | Targeted outreach in Month/Year | TBD | Metric 1Metric 2Metric etc. |

Example Engagement Tools/Vehicles

* All contract deliverables such as conference presentations and engagement workshops
* Presentations or webinars to community planning groups
* Themed workshops as stand-alone events or as part of a larger conference
* Newsletters
* Plain language web page/blogs
* Direct email/phone conversation outreach to individuals or groups
* Other communication products (contact your contract manager for assistance)

Example Outputs

* Contract deliverables such as peer reviewed journal articles
* Co-produced reports or maps
* Meeting notes or transcript of feedback received in a workshop or conference presentation
* Video recording of the workshop on YouTube or other publicly accessible platform

Example Outcomes

* New or strengthened relationships with community members or leaders
* Integration of research in the scientific literature or media coverage of research in popular press
* Sharing of project results
* Creation of new collaborations
* Discussions about applications of research at work group/interagency meetings
* Residents/community member behavioral change based on research findings

## Example Metrics

* Citations of work (presentations or journal articles)
* Re-use of published code or datasets by other groups
* Continued support for the research to continue, i.e., subsequent funding or letters of support
* Number of views in the Delta Science Tracker
* Assessment/survey of engagement outcomes at a stakeholder meeting or workshop
* Number of reported uses of science in management and/or policy, as intended