



WHY DO I NEED THIS?

Plan and manage interactions with your stakeholders to promote science-society and science-policy interfacing along the whole research process. Balance academic excellence and societal impact at the same time.

IMPACT CENTRE

Co-created by the Science in Society unit, in consultation with the research divisions. the research divisions.



HSRC
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STAKEHOLDER ENGAGEMENT PLANNING TEMPLATE

Relevance • Visibility • Impact

What is a Stakeholder Engagement Planning Template?

This is a structured document or framework that helps you plan and manage interactions with your stakeholders to promote science-society and science-policy interfacing along the whole research process. Stakeholders are individuals or groups who have an interest or concern in the activities, goals, or outcomes of your research projects.

Why is it useful?

Effective stakeholder engagement before and during the project is crucial for building positive relationships, managing expectations, and ensuring that the diverse interests of stakeholders are considered. Making the engagement process more inclusive and enhancing the legitimacy and societal relevance of our research a crucial aspect of the HSRC's activities.

So how does this work?

Templates may vary based on your research needs and the nature of the project, as well as the needs of the HSRC. The goal is to have a structured and well-documented plan that guides you in building positive relationships with your stakeholders.

A stakeholder engagement planning template typically includes several key elements. These could include:

- A **stakeholder analysis** to identify and list all potential stakeholders; assess their level of influence and interest in the project; and to categorise stakeholders based on their support, opposition, or neutrality.
- **Objectives and goals** of the stakeholder engagement process. Specify what your research/survey/project aims to achieve through engaging with stakeholders.
- A **communication and dissemination plan** to outline the communication channels and methods to be used for engaging with stakeholders. Define the **frequency and timing** of communications. Specify the **key messages** to be conveyed.
- **Engagement strategies** that tailor engagement activities based on the needs and expectations of each group. Consider various engagement methods, such as workshops, surveys, meetings, etc.
- Clearly defined **roles and responsibilities**. Remember to assign specific tasks and accountabilities to team members. Establish mechanisms for collecting **feedback** from stakeholders. Define how you will **evaluate** the success of its engagement efforts. Use feedback and evaluation to make continuous improvements to the engagement process.
- **Risk management** helps you to identify potential risks and challenges related to stakeholder engagement, as well as develop strategies for mitigation.
- Remember to **allocate resources** (human, financial, and technological) required for effective stakeholder engagement and resist the temptation to dip into them for other activities.
- **Monitoring and reporting** outlines how you will monitor progress and report on stakeholder engagement activities. Define **key performance indicators** (KPIs) for assessing the impact of engagement efforts.



Additional reading on stakeholder engagement planning

Durham E., Baker H., Smith M., Moore E. & Morgan V. (2014). [The BiodivERsA Stakeholder Engagement Handbook](#). BiodivERsA, Paris (108 pp).

Hollmann S, Regierer B, Bechis J, Tobin L, D'Elia D (2022) [Ten simple rules on how to develop a stakeholder engagement plan](#). *PLoS Comput Biol* 18(10): e1010520.

United Nations Environment Programme [Stakeholder Engagement Handbook](#)

Need more background?

The HSRC's Impact Centre has also compiled a range of resources relevant to understanding impact. The series of three **Impact Planning Guides** is a good place to start your impact journey.

1. [Impact Planning Guide I](#) delves into impact summaries and pathways, exploring their significance in showcasing research value. It emphasises the evolving expectations from researchers and institutions to demonstrate societal contributions beyond traditional academic metrics. The guide showcases real examples and offers guidelines for crafting impactful summaries and pathways.
2. [Impact Planning Guide II](#) extends and deepens the guidelines on stakeholder engagement focusing on principles and best practices.
3. [Impact Planning Guide III](#) presents research methods you can explore, experiment with and use for impact evaluation such as mapping complex impact causal pathways, comparative analysis, understanding how and why certain impact pathways are effective, and compiling impact case studies.

Stakeholder Engagement Planning Template

Project Timescale →	Before	During		During / After		After					
Roles of Stakeholders/ Areas of influence/ How stakeholders are engaged	Research strategy/ Research questions/ Project design	Networking	Advice/ Recommendations/ Project Revision	Prediction/ Modelling	Monitoring	Resource provision by stakeholder (equipment, data, money, contacts)	Training	Data user/ Recipient/ Beneficiary	Feedback	Communication and dissemination of results to stakeholders	Identify future research questions
Stakeholders →	Specific stakeholder activities										
Government policymakers or advisors											
National/international policymakers/groups											
Non-government organisations											
Business/private Sector											
General public											
Local community											
Users (e.g., practitioners, data users)											
Students											
Interpreters (e.g., science communicators, mediators, facilitators)											
Media											
Others											

Notes: Project timescale (top row) indicates the most likely stage at which each method would be applied. However, this is only a guide, as the timing may vary depending on the project. The methods can be colour-coded according to the 'level' of engagement (**Inform** – most basic level of engagement; **Consult** – specific questions are asked but not full discussion or interaction; **Involve** – more opportunity for discussion; **Collaborate** – involved to some extent in full decision making).