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| Engagement Plan forDRK-12 STEM Research Projects |

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| Evidence Quality and Reach (EQR) Hub: Community of Practice on Designing an Engagement Plan  |

## Engagement Plan Process

This document outlines a general process for planning engagement and dissemination for research reports, tools, and other products. Each section contains questions to consider that will help a project team devise a strong engagement and dissemination plan.

This plan should be viewed as a living document. Ideally, engagement planning should begin at the start of a research project and continue throughout its lifespan, with the team updating and expanding the plan as needed.

### Plan Components

1. Specify project goals.
2. Identify audiences and objectives.
3. Determine strategies.
4. Develop key messages.
5. Create timeline and work plan.
6. Build outreach list.
7. Track outcomes and impact.

## Specify Project Goals

**What are the overall goals of the research project?**

* State the **broad** goals of your research project in **nontechnical, or plain, language**.
	+ Consider the **objectives** of your research and the **problems of practice or needs** that your research is addressing.
	+ Consider the **groups, or audiences**, that will use the research, benefit from it, and be affected by it.
	+ Focus on your **overall project or study**. You will state the engagement goals for your project in the next section.

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| Project Goals |
| [Case study example](https://www.air.org/project/stem-interest-and-engagement-stem-ie-study): Gain a more in-depth understanding of youth experiences in STEM-oriented, summer learning programs and how those experiences relate to the learning environment and staff practices. |
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## Identify Audiences and Objectives

**Who are the audiences for your research findings?**

* Who will **benefit** from or be **affected** by the research (e.g., district staff, principals, teachers, students, families/caregivers, communities)?
* Who has the **power** to use the findings to shape policy and practice (e.g., education leaders, administrators, policymakers)?
* Who may be **interested** in the findings (e.g., broader research or education field, local community or business members)?
* Who is **talking** about or has **written** about this issue (e.g., researchers, media/reporters, bloggers/influencers)?

**What are your engagement objectives for each audience?**

* **Raise awareness:** Increase the audience’s awareness of and knowledge about an issue.
* **Change attitudes:** Deepen the audience’s understanding and address misconceptions.
* **Take action:** Instill in the audience a sense of urgency and recommend actions to take.

### Example Audiences

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| STEM teachersCurriculum specialistsAssessment coordinatorsGuidance counselors | PrincipalsSuperintendentsDistrict and school leadersState education agency staff | Parents, caregivers, and familiesCommunity and business membersPolicymakersResearch community |

Complete the first two columns in the table. For each audience, identify *primary* and *secondary* audiences for your research and your engagement objectives. Then consider the questions on the next page to determine the strategies you will use to reach and engage each audience.

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| Audience | Engagement objectives  | Strategies to connect with the audience |
| **Primary audiences** |
| [Case study example](https://www.air.org/project/stem-interest-and-engagement-stem-ie-study): Staff and leaders of out-of-school STEM programs | Raise awarenessTake action | Practitioner-oriented toolkit, professional development resources, brief videos about featured programs, website housing all links and resources |
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| **Secondary audiences** |
| [Case study example](https://www.air.org/project/stem-interest-and-engagement-stem-ie-study): Students and families/caregivers of out-of-school STEM programs | Raise awareness | Brief videos about featured programs, website housing all links and resources |
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## Determine Strategies

**What strategies and products will you use to reach and engage each target audience?**

* In the table in the preceding section, match each audience to the strategies and products that you think will be most effective for **reaching that audience** and achieving your **project goals and engagement objectives**.
* Consider how each audience prefers to **obtain and share information** (e.g., print publications, digital magazines and journals, conferences, webinars, websites, email, newsletters, blogs, social media, podcasts, videos).
* Consider the **time and capacity** of each audience for engaging with research as well as the **challenges** that audiences may face in accessing information, such as constraints on technology access or geographic barriers.
* Consider your **budget, timeline, and other constraints** when selecting the right strategies for your project, audiences, and goals.
See the Overview of Engagement Strategies handout for additional guidance.
* *Tip:* Consider developing a **suite of products** that complement one another (e.g., a 15-page report, four-page brief, one-page infographic, podcast) to address different audience needs, mindsets, objectives, and available time and capacity.

### Example Strategies

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| Website landing page and promotionNewsletters and alertsOutreach email or eblastPresentations (e.g., conferences, workshops)Social mediaBlog postsBriefs and policy briefs | InfographicsFact sheets, one-pagersPractice guidesPamphlets, postersVideos, documentaries, podcastsWebinarsTraining and coaching sessionsTools and apps | Journal articlesReportsOutreach to partners and networksOutreach to internal staffMedia outreachCommunity meetingsPublic service announcements |

## Develop Key Messages

**What are the essential points you want to share about your research project and its findings?**

Key messages communicate the essential points that you want to share about your study. Three key messages are often sufficient. These messages should use **plain language** and be **tailored to specific audiences**’ interests, needs, and capabilities. Key messages are not usually used as is but rather repackaged and woven into planned engagement activities and products. In this way, key messages serve as a point of reference to guide engagement planning and development and ensure that you stay on message.

* **Write a summary:** Capture what the research was about and how it addresses needs and interests that different groups may have. Include key data points and implications. You can draw on this content to create your engagement products.
* **Distill to three to four key messages:** Distill the essence of the study and its findings and implications to three to four brief statements.
	+ Develop each key message around a **single idea** that links to one or more project goals and audience objectives.
	+ Use **plain language** (concise, active voice, easy to understand, no jargon or technical terms, and few or no acronyms).
	+ Focus on what your audiences will consider the most **relevant, compelling, beneficial,** or **useful** aspects of the findings.
	+ Indicate how the research answers **key questions** or addresses **key needs**.
	+ Indicate how the research **clarifies or challenges** commonly held beliefs.
	+ Indicate what is **unique** about the research or findings (e.g., first or largest study of its kind).
* **Add supporting points:** Provide additional points to help audiences more fully understand the findings.
	+ **Expand** on a key message. Add data points, facts, examples, and explanations as needed.
	+ Provide **context**, including context for data (e.g., “three times more than [fill in the blank]” instead of raw numbers).
* **Tailor and refine the messages:**
	+ Consider your project **goals**, **audience** needs and interests, and engagement **objectives**.
	+ **Customize** the messages as needed for each audience. Adapt the language, level of detail, and examples to foster knowledge uptake.
	+ Consider how to **frame** the messages to make them asset based and more relevant. Framing refers to the use of emphasis and context to shape your message and promote engagement. For example, consider how you might transform a key message into a headline to grab people’s attention.
	+ Consider potential **sensitivities** for different audiences, both in framing and the use of language.
	+ Read the messages aloud. They should sound **natural** when spoken.

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| Project summary |
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| Key message | Target audiences |
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## Create Timeline and Work Plan

**What is the timeline for product development and the rollout of the engagement campaign?**

### Product Development

* Create a list of the engagement and promotional content and products that your team will be developing. Plan when each activity will happen and who will be responsible for the task.
* Use your project summary and key messages to develop content for promotional and dissemination pieces, such as eblasts, infographics, one-pagers, and social media posts. Consider the resources and expertise that will be needed to develop the content and products.
* If possible, have research partners and representatives from your target audiences serve as reviewers to ensure you are presenting your findings, implications, and calls to action in ways that resonate with your audiences.

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| Product development task | Who | When | Status |
| [Case study example](https://www.air.org/project/stem-interest-and-engagement-stem-ie-study): * Project webpage to highlight study and house all resources
* Study report and two-page brief
* Promotional content (e.g., eblast, social media, web content)
* Practitioner-oriented toolkit
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### Engagement Campaign

* Create a timeline for rolling out your engagement campaign (i.e., the coordinated set of outreach, dissemination, and engagement activities that you have planned to achieve your engagement objectives).
	+ Set a **date** for each activity, such as when you plan to publish a report; post social media; or send an eblast, newsletter item, or press release. Activities should occur in stages to build momentum and to ensure that no one audience is saturated with information.
	+ Consider the timing that will best support or align with **project milestones**.
	+ Consider any **sensitivities** about timing, such as the need to notify partners before other groups or to notify internal leadership before reaching out to the media.
* Consider events and issues that you can leverage to amplify interest or reach. For example, you might release a report and the related infographic or video to coincide with a national conference or theme month that has the same focus as your study.

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| Engagement campaign task | Who | When | Status |
| [Case study example](https://www.air.org/project/stem-interest-and-engagement-stem-ie-study): * Publish project webpage with summary of study
* Publish study report and two-page brief
* Add key findings to project webpage
* Send eblast to announce report or brief
* Send social media (when to post and for what period of time)
* Send eblast to announce practitioner-oriented toolkit; include links to project webpage with all other resources
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## Build Outreach List

**Who can help spread the word about the research findings and products?**

* To support dissemination, build custom outreach mailing lists for each relevant strategy or product. Identify **internal and external individuals, partners, champions, networks, and organizations** that could assist with outreach and dissemination and how they can help. For example, external partners might share content and products with their networks through their own communication channels (e.g., newsletters, social media, websites). List these individuals, groups, and organizations in the tables on the next page.
* Include potential conferences and other opportunities during which you can present your findings.
* **Promotional kit:** To assist partners, champions, and others in amplifying your research and sharing content, create a kit of sample promotional content they can use. For example, include eblast and website content, a newsletter item, and social media posts and graphics. This content should be written as if it is coming from other individuals and organizations so that they can easily use the content as is. For this reason, you will want to include your project’s affiliate organization.
* [**Media kit**](https://cadrek12.org/resources/dissemination-toolkit-media-interviews)**:** Will the research results interest the broader academic or mainstream media (print publications, radio, television)? Did the study produce findings that are new, unique, or far reaching? Will the findings have the potential to significantly influence statewide, regional, or national policy or practice? Do the findings relate to a topic that is in the news or an upcoming event?
**If yes:**
	+ Develop a **media pitch or press release** that includes the key messages and clearly indicates why the findings are newsworthy.
	+ Determine **traditional media outlets** and reporters to target. Consider their beat (area of expertise or focus) and geographic location. Target reporters who have written about the topic or related topics.
	+ In conjunction with traditional media outreach, send a pitch to **bloggers and influencers** who cover issues related to the topic. In particular, target bloggers and influencers who have expressed interest in the topic or covered it recently.

### Internal Outreach

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| Individual or group | Relationship | How they can help | What to send them |
| [Case study example](https://www.air.org/project/stem-interest-and-engagement-stem-ie-study): Other AIR staff focused on STEM research | Organizational staff | Share through their networks and marketing channels | Promotional kit |
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### External Outreach (Including Conference Opportunities)

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| Individual or group | Relationship | How they can help | What to send them |
| [Case study example](https://www.air.org/project/stem-interest-and-engagement-stem-ie-study): Study summer STEM programs, Boston After School & Beyond, Providence After School Alliance  | Study partners | Share through their networks and marketing channels | Promotional kit |
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## Track Outcomes and Impact

**What metrics will you use to track outcomes and impact, and how will you determine success?**

* Determine what outcomes you would like to achieve and what success will look like. What specifically do you want to happen?
* Use [**data analytics**](https://cadrek12.org/resources/dissemination-toolkit-analytics) (e.g., website metrics, social media engagement, report downloads, video views, webinar and conference session attendance) to monitor your engagement outcomes. Based on the results, refine your engagement plan as needed.
* List **measurable goals** so that you can track progress. Examples:
	+ Within 3 months, receive 100 webpage views and 50 downloads of the study report or infographic.
	+ Within 1 month, receive 100 engagements and 25 shares, likes, or Retweets on social media.
	+ Receive at least three mentions in education news outlets and/or blogs.

### Engagement Outcomes and Impact

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| Month | Activity or strategy | Measurable goal(short- and medium-term goals) | Outcomes and impact (audience metrics) |
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## Resources

**EQR Hub page on Community for Advancing Discovery Research in Education (CADRE) website:**<https://cadrek12.org/projects/evidence-quality-and-reach-hub-drk-12-community>

**CADRE Dissemination Toolkit:** <https://cadrek12.org/dissemination-toolkit>

**Community-Centered Dissemination Toolkit:** <https://med.umn.edu/healthdisparities/community-engagement/dissemination-toolkit>

**plainlanguage.gov:**<https://www.plainlanguage.gov/>

**The Communications Network: Diversity, Equity, Inclusion Resources:** <https://comnetworkdei.org/dei-resources>

**Centers for Disease Control and Prevention: Style Guide for Framing Health Equity and Avoiding Stigmatizing Language:** <https://ehe.jhu.edu/DEI/Health_Equity_Style_Guide_CDC_Reducing_Stigma.pdf>

**Chicago Beyond: *Why Am I Always Being Researched?*** <https://chicagobeyond.org/researchequity/>

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