

Adaptation Roadmap

Workbook 2: Center People in Decision-Making

Worksheets 2A-20

Outcomes include:
**Management Team
Co-Created Participation Plan(s)**

Tracking Progress

Name(s):
Title/Dept./other Identifier:
Jurisdiction/Organization:
Date Worked On:
Worksheets Worked On:

Name(s):
Title/Dept./other Identifier:
Jurisdiction/Organization:
Date Worked On:
Worksheets Worked On:

Name(s):
Title/Dept./other Identifier:
Jurisdiction/Organization:
Date Worked On:
Worksheets Worked On:

Workbook 2

2.1 Managing the Process
(Worksheet 2A-2C):

2.2 Input Into the Process
(Worksheets 2D-2E):

2.3 Participation and Decision-Making
(Worksheets 2F-2G):

2.4 Effective Communications
(Worksheet 2H):

PARTICIPATION PLAN(S)
(Worksheets 2I-2O):

*Print Your Management Team and
Participation Strategies*

INSTRUCTIONS

Workbook 2 and Outcomes

This workbook is designed to accompany Chapter 2: Center People in Decision-Making to structure and organize your adaptation effort and will be used throughout all the remaining sections of the Adaptation Roadmap. The worksheets within provide fillable PDF spaces to list and record your responses.

Management Team

Section 2.1 **Managing the Adaptation Process** provides four subsections designed to help you organize a management team, which we consider as including a Core Team, Key Partners (such as Advisory Committees), and potentially consultants. The outcomes will result in a series of worksheets:

- **Core Team (Worksheet 2A)**
- **Key Partners / Advisory Committees (Worksheet 2B)**
- **Roles and Responsibilities (Worksheet 2C)**

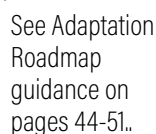
Co-Creating The Participation Plan(s)

Individuals on the Management Team should work through sections **2.2 Input in the Process**, **2.3 Participation and Decision-Making**, and **2.4 Effective Communications** to begin developing an approach for engaging with communities and stakeholders throughout this effort. The outcomes will result in a series of worksheets:

- **Goals of Participation and Specific Audiences (Worksheets 2D-E)**
- **Levels of Participation (Worksheet 2F)**
- **Decision-Making Process (Worksheet 2G)**
- **Communications Approach (Worksheet 2H)**
- **Audience-Specific Participation Plans (Worksheet 2I-2O)**

Supplemental Pages

The supplemental pages provide extra space to list additional notes, as needed.



Worksheet 2A: Management Team

Who Makes Up Your **Core Team**?

Use the table to list Core Team members, including their name, area(s) of expertise, organization or department, and contact information. Use the space to add notes, as needed. Check the boxes to the left to signify what sphere of perspectives they represent: government, community and/or tribal, locally relevant sector, or consultant. Consider the distribution of individuals on your team and check the box on the right to signify where equitable representation is present.

Consider reviewing information gathered in Chapter 1 in sections **1.3.1 Government Capacity**, **1.3.2 Community Capacity**, and **1.3.3 Stakeholder Capacity** (Worksheet 1D from Workbook 1) as a starting point.

2.1.1: Our Core Team (and potentially 2.1.3: consultants) includes...

[illegible]

Space for
notes, if
needed.



See Adaptation Roadmap guidance on pages 44-51.

Adaptation Roadmap

Worksheet 2B: Management Team

2.1 Managing the Process

Key Partnerships That Exist or Are Needed

Use the table to list Key Partnerships, and include name, area(s) of expertise, organization or department, and contact information, if known. Use the boxes on the left to check if these are existing relationships or needed ones. If there are relationships that are needed, use the supplemental page note space to describe how those relationships might begin to be built.

Needed Existing	2.1.2: Individuals that should be engaged early in developing this effort include...			
	Name, Title	Area of Expertise	Organization/Department	Contact Information

Check if you you'd like to create additional groups and use space provided in Supplementary pages.

Do You Want to Create One (Or More) "Advisory Committees"?

If yes, what are you naming it?

Use the table to list Advisory Committee member and include name, area(s) of expertise, organization or department, and contact information, if known. Check the boxes to the left to signify what perspective they represent, and the box to the right to check for equitable representation. Depending on the size and/or complexity of your adaptation effort, you may consider having more than one, or different types of Advisory Committees. Use the supplemental page space to add additional committees, if needed.

Consultant Locally Relevant Community/Tribal Government	2.1.2: Individuals that should be part of a committee connected to the Core Team				Equitable Representation
	Name, Title	Area of Expertise	Organization/Department	Contact Information	

Check if you you'd like to create additional groups and use space provided in Supplementary pages.



See Adaptation
Roadmap
guidance on
pages 44-51.

Adaptation Roadmap

Worksheet 2C: Management Team

2.1 Managing the Process

Responsibilities and Roles of Core Team

Use the space to describe the responsibilities and roles of the Core Team as a whole, as well as individual members. Include how the roles of different team members may shift throughout the process, and what your anticipated meeting schedule will be. This is a starting point and may evolve as the process moves forward. It may also be helpful to begin considering the decision-making process for this team (in section 2.3 **Participation and Decision-Making**), with space for details in **Worksheet 2G**.

2.1.3: Team Responsibilities

2.1.3: Individual Roles

2.1.3: Meeting Schedule

Use Worksheet 2G to describe the decision-making process in greater detail.

Roles and Responsibilities of Key Partners or Advisory Committees

Use the space to describe the responsibilities and roles of the Advisory Committee, and how it is connected to the Core Team. Describe the process and criteria for including individuals on the Advisory Committee for transparency. Explore, and to the best of your ability describe, the relationship among the Core Team and Advisory Committee, including how information will be shared and what influence and decision-making power the Advisory Committee will have. Considering the decision-making process for this effort (in section 2.3 **Participation and Decision-Making**), with space for details in **Worksheet 2G**.

2.1.3: Key Partner or Advisory Group Responsibilities

2.1.3: Meeting Schedule

Use Worksheet 2G to describe the decision-making process in greater detail.



See Adaptation
Roadmap
guidance on
pages 52-59.

Adaptation Roadmap

Worksheet 2D: Co-Creating the Participation Plan

2.2 Input in the Process

What Are Your **Goals** for Community and Stakeholder Participation?

Use the space to describe the goals of participation. This can be a starting point that can be updated as you advance your adaptation effort.

2.2.1 The goals of participation include...

What **Community and Stakeholder Groups Should be Considered** and Why?

Based on your goals for participation, explore stakeholder group categories and specific audiences that should participate. On the next page, you'll be asked to provide more information on each of these stakeholder groups.



Communities

Vulnerable (i.e. Disadvantaged)
Tribal Communities
General Public
Youth
Other:
Other:



Sectors

Business and Business Associations
Non-Governmental Organizations
Community-Based Organizations
Faith-Based Organizations
Environmental Organizations
Other:
Special Districts / Utilities
Open Space Districts
School Districts
Utilities
Other:
Academia/Research
Other:



Government

Internal (Interdepartmental)
Neighboring Jurisdictions
Regulatory Agencies
Tribal Government
Other:
Other:



See Adaptation
Roadmap
guidance on
pages 52-59.

Adaptation Roadmap

Worksheet 2E: Audiences Considered and Why

2.2 Input in the Process

What **Community and Stakeholder Groups Should be Considered** and Why?

For each audience identified on the previous page, consider the reasons for including this group in the effort (e.g. impacted, skills, etc.), if these populations or audiences have already been, or can be spatially mapped (link to data sources if they currently exist), and if any relationships currently exist with someone from these audience groups that can help co-create the participation plans. Check the box on the right to create specific audience plans, which will be developed in **Worksheets 2I-2O**.

Consider

Create Audience Plan

2.2.2 Audiences to Include and Why

2.2.3 Where

2.2.4 Co-Creating

Communities	Reason(s) to Include	Mapped Populations	Relationships
Vulnerable (i.e. Disadvantaged)			
Tribal Communities			
General Public			
Youth			
Other:			
Other:			

Sectors	Reason(s) to Include	Mapped Populations	Relationships
Business and Business Associations			
Non-Government Organizations			
Community-Based Organizations			
Faith-Based Organizations			
Environmental Organizations			
Other:			
Special Districts / Utilities			
Open Space Districts			
School Districts			
Utilities (Electric, Telecom, etc.)			
Other:			
Academia / Research			
Other:			

Government	Reason(s) to Include	Mapped Populations	Relationships
Internal (Interdepartmental)			
Neighboring Jurisdictions			
Regulatory Agencies			
Tribal Government			
Other:			
Other:			



See Adaptation Roadmap guidance on pages 60-68.

Adaptation Roadmap

Worksheet 2D: Participation Across Adaptation

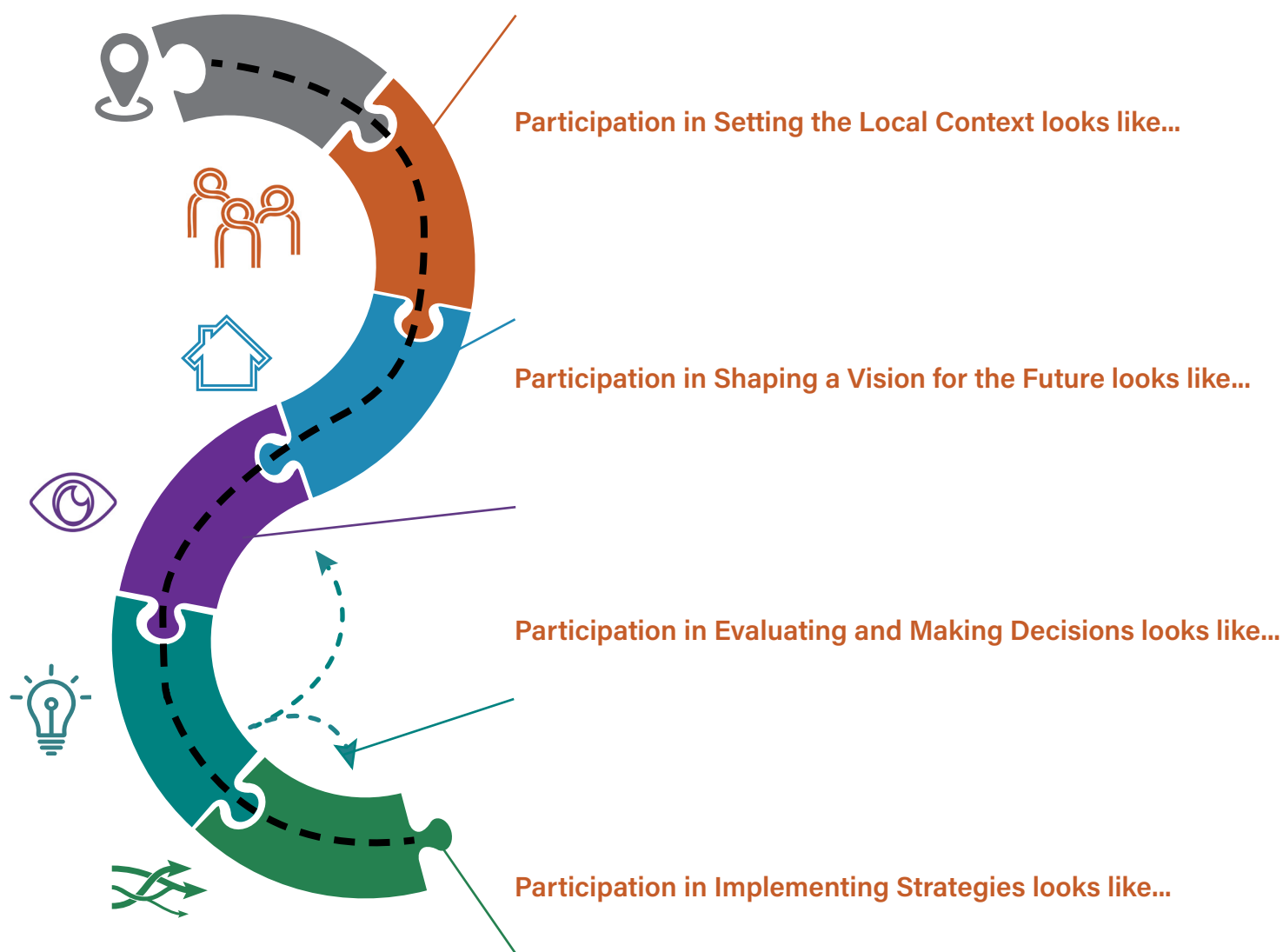
2.3 Participation and Decision-Making

Levels of Participation Across the Adaptation Effort

Different levels of participation may occur at different parts of an adaptation effort. Consider the graphic and space below to *begin* thinking through what level of participation, structures for participation, and audiences should be engaged across your adaptation effort. Be sure to work with Key Partners and/or with individuals within each of the audiences to ensure effective approaches for participation. The purpose of this page is to explore an overall sense of the participation effort in full, while the **Worksheets 2I-2O** will provide space for audience specific information. Note: You may have to look ahead in the Adaptation Roadmap, such as each Chapter introduction page, to get a better idea of what the chapters includes.

2.3.1 and 2.3.2 Levels and Structures for Participation

Co-Creating the Participation Plan includes...





See Adaptation
Roadmap
guidance on
pages 60-68.

Adaptation Roadmap

Worksheet 2E: Process for Decision-Making

2.3 Participation and Decision-Making

Points for Decisions and Decision-Making Process Across the Adaptation Effort

There are many decisions that need to be made across adaptation, some are big decisions while others are seemingly smaller. Use the space to articulate the decision-making process for the Core Team, Advisory Committee, and participants throughout the effort. Include if there are key points for decisions, as well as what approaches will be used to make those decisions.

2.2.3: Decisions to be made by the Core Team and approach

2.2.3: Decisions to be made or influenced by the Advisory Committee and approach

2.2.3: Participants will have influence over the following decisions...

Point for Decisions	Decision-Making Type	Audiences Involved
(e.g. Shared Vision and Guiding Principles)	(e.g. Consensus)	(e.g. All)



See Adaptation
Roadmap
guidance on
pages 69-75.

Adaptation Roadmap

Worksheet 2H: Communications Approach

2.4 Effective Communications

Communications Across the Adaptation Effort

Use the space below to articulate key components of a communications plan. Expand on this outline as you see fit.

Background and Context Setting

Goals and Expectations

Primary Impact Story

Vehicles for Communication

Other Information As Needed

CO-CREATE PARTICIPATION PLANS

2.2
Input in the Process

2.3
**Participation and
Decision-Making
&**

2.4
**Effective
Communications**

The following pages and **Worksheets 2I-2O** provide space for you to use all the information gathered in **2.2 Input in the Process**, **2.3 Participation and Decision-Making**, and **2.4 Effective Communications** to co-create plans for how different audiences will participate throughout the adaptation effort.

Consider having on hand the following Worksheets:

- **Goals of Participation and Specific Audiences (Worksheets 2D-2E)**
- **Levels of Participation (Worksheet 2F)**
- **Decision-Making Process (Worksheet 2G)**
- **Communications Approach (Worksheet 2H)**

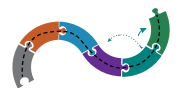
Instructions for Co-Creating Participation Plan(s)

Use **Worksheets 2E-2H** listed above, along with guidance in the Adaptation Roadmap to develop audience-specific plans for how participants will be involved throughout the adaptation effort. To ensure these plans are being developed with the appropriate partners, review **2.2.4 Assess Relationships for Participation**. Additional key sections of the Adaptation Roadmap to review include **2.3.2 Types of Participation Structures**, **2.3.4 Types of Networks and Agreements**, **2.4.2 Connect to Values**, **2.4.3 Make it Relatable**, and **2.4.4 Frame the Message and Delivery**.

Within each of the following worksheets, you will be asked to bring together various components of Chapter 2 to articulate the following:

- **Assess** the specific audience, partnerships to co-develop the strategies, and determine if any partnership agreements may be necessary;
- **Identify** the populations and/or characteristics of the populations;
- List **Strategies** for participation that will be used to engage with the specific audience, including number and type of events, as well as specific forums or meeting spaces and structures for participation;
- Approaches for **Communications** with the specific audience regarding audience-specific values, framing the message, and finding effective messengers to engage with during this effort; and
- Space for additional notes as needed.

These worksheets can serve as important ways to organize your process and describe how each group will participate meaningfully. As you continue your effort, be aware that these may need to be refined, updated, and that you may need to add additional stakeholders as you advance conversations on adaptation.



See Adaptation
Roadmap
guidance on
pages 52-75.

Adaptation Roadmap

Worksheet 2I:

Co-Creating the Participation Plan

Stakeholder Group: Communities Sectors Government

Check the stakeholder group category, or create your own.

Audience: _____

Use the table below to explore how to assess, identify, and create strategies for participation and communications with different stakeholder groups. Page numbers below refer to pages in the Adaptation Roadmap to review for more information.

	Guiding Questions	Responses
Assess	Get Specific: List specific name(s), organizations, entities, and what you know about this group.	
	Be Connected: Do you have a partner who can help ensure this plan is effective? (See page 59.)	
	Agreements or Partnerships: Are any agreements needed to move forward? (See page 68.)	
Identify	Map Populations and Characteristics: Where is this audience and what characteristics do they have? (See pages 58.)	
Strategies	Number and Types of Events: Consider how many events or meetings you might have with this audience. (See pages 60-65.)	
	Structures for Participation: What is the primary avenue(s) to engage in dialogue and discussion with this audience? Consider what existing avenues you might be able to build upon. (See pages 60-65.)	
	Consider Values/Motivations: What might bring this audience into conversations? (See pages 71-73.)	
Communications	Framing the Message: What kinds of messaging should be used? (See pages 74-75.)	
	Trusted Messenger and Delivery: How might this audience like to receive information, and from who? (See pages 74-75.)	

Space for notes,
if needed.

Adaptation Roadmap

Worksheet 2J:

Co-Creating the Participation Plan

Stakeholder Group: Communities Sectors Government

Check the stakeholder group category, or create your own.

Audience: _____

Use the table below to explore how to assess, identify, and create strategies for participation and communications with different stakeholder groups. Page numbers below refer to pages in the Adaptation Roadmap to review for more information.

	Guiding Questions	Responses
Assess	Get Specific: List specific name(s), organizations, entities, and what you know about this group.	
	Be Connected: Do you have a partner who can help ensure this plan is effective? (See page 59.)	
	Agreements or Partnerships: Are any agreements needed to move forward? (See page 68.)	
Identify	Map Populations and Characteristics: Where is this audience and what characteristics do they have? (See pages 58.)	
	Number and Types of Events: Consider how many events or meetings you might have with this audience. (See pages 60-65.)	
Strategies	Structures for Participation: What is the primary avenue(s) to engage in dialogue and discussion with this audience? Consider what existing avenues you might be able to build upon. (See pages 60-65.)	
	Consider Values/Motivations: What might bring this audience into conversations? (See pages 71-73.)	
Communications	Framing the Message: What kinds of messaging should be used? (See pages 74-75.)	
	Trusted Messenger and Delivery: How might this audience like to receive information, and from who? (See pages 74-75.)	

Space for notes,
if needed.

Adaptation Roadmap

Worksheet 2K:

Co-Creating the Participation Plan

Stakeholder Group: Communities Sectors Government

Check the stakeholder group category, or create your own.

Audience: _____

Use the table below to explore how to assess, identify, and create strategies for participation and communications with different stakeholder groups. Page numbers below refer to pages in the Adaptation Roadmap to review for more information.

	Guiding Questions	Responses
Assess	Get Specific: List specific name(s), organizations, entities, and what you know about this group.	
	Be Connected: Do you have a partner who can help ensure this plan is effective? (See page 59.)	
	Agreements or Partnerships: Are any agreements needed to move forward? (See page 68.)	
Identify	Map Populations and Characteristics: Where is this audience and what characteristics do they have? (See pages 58.)	
Strategies	Number and Types of Events: Consider how many events or meetings you might have with this audience. (See pages 60-65.)	
	Structures for Participation: What is the primary avenue(s) to engage in dialogue and discussion with this audience? Consider what existing avenues you might be able to build upon. (See pages 60-65.)	
	Consider Values/Motivations: What might bring this audience into conversations? (See pages 71-73.)	
Communications	Framing the Message: What kinds of messaging should be used? (See pages 74-75.)	
	Trusted Messenger and Delivery: How might this audience like to receive information, and from who? (See pages 74-75.)	

Space for notes,
if needed.

Adaptation Roadmap

Worksheet 2L:

Co-Creating the Participation Plan

Stakeholder Group: Communities Sectors Government

Check the stakeholder group category, or create your own.

Audience: _____

Use the table below to explore how to assess, identify, and create strategies for participation and communications with different stakeholder groups. Page numbers below refer to pages in the Adaptation Roadmap to review for more information.

	Guiding Questions	Responses
Assess	Get Specific: List specific name(s), organizations, entities, and what you know about this group.	
	Be Connected: Do you have a partner who can help ensure this plan is effective? (See page 59.)	
	Agreements or Partnerships: Are any agreements needed to move forward? (See page 68.)	
Identify	Map Populations and Characteristics: Where is this audience and what characteristics do they have? (See pages 58.)	
Strategies	Number and Types of Events: Consider how many events or meetings you might have with this audience. (See pages 60-65.)	
	Structures for Participation: What is the primary avenue(s) to engage in dialogue and discussion with this audience? Consider what existing avenues you might be able to build upon. (See pages 60-65.)	
	Consider Values/Motivations: What might bring this audience into conversations? (See pages 71-73.)	
Communications	Framing the Message: What kinds of messaging should be used? (See pages 74-75.)	
	Trusted Messenger and Delivery: How might this audience like to receive information, and from who? (See pages 74-75.)	

Space for notes,
if needed.

Adaptation Roadmap

Worksheet 2M:

Co-Creating the Participation Plan

Stakeholder Group: Communities Sectors Government

Check the stakeholder group category, or create your own.

Audience: _____

Use the table below to explore how to assess, identify, and create strategies for participation and communications with different stakeholder groups. Page numbers below refer to pages in the Adaptation Roadmap to review for more information.

	Guiding Questions	Responses
Assess	Get Specific: List specific name(s), organizations, entities, and what you know about this group.	
	Be Connected: Do you have a partner who can help ensure this plan is effective? (See page 59.)	
	Agreements or Partnerships: Are any agreements needed to move forward? (See page 68.)	
Identify	Map Populations and Characteristics: Where is this audience and what characteristics do they have? (See pages 58.)	
Strategies	Number and Types of Events: Consider how many events or meetings you might have with this audience. (See pages 60-65.)	
	Structures for Participation: What is the primary avenue(s) to engage in dialogue and discussion with this audience? Consider what existing avenues you might be able to build upon. (See pages 60-65.)	
	Consider Values/Motivations: What might bring this audience into conversations? (See pages 71-73.)	
Communications	Framing the Message: What kinds of messaging should be used? (See pages 74-75.)	
	Trusted Messenger and Delivery: How might this audience like to receive information, and from who? (See pages 74-75.)	

Space for notes,
if needed.

Adaptation Roadmap

Worksheet 2N:

Co-Creating the Participation Plan

Stakeholder Group: Communities Sectors Government

Check the stakeholder group category, or create your own.

Audience: _____

Use the table below to explore how to assess, identify, and create strategies for participation and communications with different stakeholder groups. Page numbers below refer to pages in the Adaptation Roadmap to review for more information.

	Guiding Questions	Responses
Assess	Get Specific: List specific name(s), organizations, entities, and what you know about this group.	
	Be Connected: Do you have a partner who can help ensure this plan is effective? (See page 59.)	
	Agreements or Partnerships: Are any agreements needed to move forward? (See page 68.)	
Identify	Map Populations and Characteristics: Where is this audience and what characteristics do they have? (See pages 58.)	
Strategies	Number and Types of Events: Consider how many events or meetings you might have with this audience. (See pages 60-65.)	
	Structures for Participation: What is the primary avenue(s) to engage in dialogue and discussion with this audience? Consider what existing avenues you might be able to build upon. (See pages 60-65.)	
	Consider Values/Motivations: What might bring this audience into conversations? (See pages 71-73.)	
Communications	Framing the Message: What kinds of messaging should be used? (See pages 74-75.)	
	Trusted Messenger and Delivery: How might this audience like to receive information, and from who? (See pages 74-75.)	

Space for notes,
if needed.

Adaptation Roadmap

Worksheet 20:

Co-Creating the Participation Plan

Stakeholder Group: Communities Sectors Government

Check the stakeholder group category, or create your own.

Audience: _____

Use the table below to explore how to assess, identify, and create strategies for participation and communications with different stakeholder groups. Page numbers below refer to pages in the Adaptation Roadmap to review for more information.

	Guiding Questions	Responses
Assess	Get Specific: List specific name(s), organizations, entities, and what you know about this group.	
	Be Connected: Do you have a partner who can help ensure this plan is effective? (See page 59.)	
	Agreements or Partnerships: Are any agreements needed to move forward? (See page 68.)	
Identify	Map Populations and Characteristics: Where is this audience and what characteristics do they have? (See pages 58.)	
Strategies	Number and Types of Events: Consider how many events or meetings you might have with this audience. (See pages 60-65.)	
	Structures for Participation: What is the primary avenue(s) to engage in dialogue and discussion with this audience? Consider what existing avenues you might be able to build upon. (See pages 60-65.)	
	Consider Values/Motivations: What might bring this audience into conversations? (See pages 71-73.)	
Communications	Framing the Message: What kinds of messaging should be used? (See pages 74-75.)	
	Trusted Messenger and Delivery: How might this audience like to receive information, and from who? (See pages 74-75.)	

Space for notes,
if needed.

SUPPLEMENTAL PAGES

Workbook 2 and Outcomes

Extra space for additional notes as needed.

Adaptation Roadmap

Supplemental Page 1

Describe How Key Partners Will Be Involved...

Do You Want to Create One (Or More) "Advisory Committees"?
If yes, what are you naming it?

Use the table to list Advisory Committee member and include name, area(s) of expertise, organization or department, and contact information, if known. Check the boxes to the left to signify what perspective they represent, and the box to the right to check for equitable representation. Depending on the size and/or complexity of your adaptation effort, you may consider having more than one, or different types of Advisory Committees. Use the supplemental page space to add additional committees, if needed.

Consultant
Locally Relevant
Community/Tribal
Government

2.1.2: Individuals that should be part of a committee connected to the Core Team

Name, Title	Area of Expertise	Organization/Department	Contact Information

Equitable
Representation

Adaptation Roadmap

Supplemental Page #

Extra space for additional notes as needed.

Duplicate this PDF page to take additional supplemental notes.

Workbook 2 is a complimentary resource to the **Adaptation Roadmap: A Practitioner's Guide to Plan and Implement a Collaborative, Equitable, Integrative, and Flexible Approach to Sea Level Rise Adaptation**. These resources were created by the Adapting to Rising Tides Program at the San Francisco Bay Conservation and Development Commission. March 2022.

This workbook has been made to meet Web Content Accessibility Guidelines (WCAG) Level AA Requirements to the extent feasible. We acknowledge parts of this document may still require additional assistance. Please contact us at BCDC at:

415-352-3600

Bay Area Metro Center (375 Beale St., Suite 510, San Francisco, CA 94105)

Accessibility@bcdc.ca.gov