

Template:

Engagement Plan

This template is a starting point for developing the Engagement Plan described in [Step Two of the Learning & Early Discussions Module](#) of the Guide. The Engagement Plan should be focused on the “who” and “how” of early discussions, as TNC and the IPLC are getting to know each other, not on the detailed “what” that follows later and is guided by the Consultation Plan referenced in Module Two. This template also includes some questions for TNC and the IPLC to consider when putting the plan together. Agreement on the contents of this Engagement Plan should be documented in a culturally responsive manner, which may include signatures or initials on the plan, an exchange of emails, a show of hands at a meeting, a protocol or ceremony.

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Initiative: _____

Time period: _____

Date: _____

Updated as of: _____

Approved by:

Organization or group:

Name: _____

Name: _____

Name: _____

Name: _____

Name: _____

Name: _____

1. TNC team capacity, including language, cultural experience and training needed for working with IPLCs.

a. Staff training and workshops taken, and other learning experiences:

b. Other capacity needs:

c. How capacity needs will be filled, e.g., internal or external resources

2. Key issues to be discussed by TNC and the IPLC. This list should reflect the high-level topics the parties will discuss when getting to know each other; the points listed in (a) through (c) below are examples only.

a. IPLC development goals and natural resource priorities:

b. TNC's conservation priorities:

c. Potential areas of alignment between (a) and (b) and opportunities for collaboration:

3. Means by which discussions will occur, describing how different social identities will be meaningfully included

a. Frequency and timing:

b. Place:

c. Format:

4. Key participants from TNC and the IPLC. Include the name and title of each participant and the topics to be discussed; some participants may be important for some discussions and not others. Review this list to ensure representation from IPLC institutions and inclusion of different social identities.

a. TNC:

i. Name and title	Issue(s) to be discussed
<hr/>	<hr/>

ii. Name and title	Issue(s) to be discussed
<hr/>	<hr/>

iii. Name and title	Issue(s) to be discussed
<hr/>	<hr/>

b. IPLC:

i. Name, title and organization	Issue(s) to be discussed
<hr/>	<hr/>

ii. Name, title and organization	Issue(s) to be discussed
<hr/>	<hr/>

iii. Name, title and organization	Issue(s) to be discussed
<hr/>	<hr/>

5. Existing IPLC engagement processes.

a. Describe established engagement processes the IPLC prefers to follow, if the IPLC is willing to share this information:

b. Describe prior consultations with other NGOs and the positive and negative aspects of those experiences, if the IPLC is willing to share this information:

c. Describe the IPLC's preferred engagement processes:

6. IPLC Decision Making

a. Describe how the IPLC will make decisions during initial engagement:

b. Describe how those decisions will be conveyed to TNC:

c. Assess whether there's sufficient cooperation to proceed:

7. Documentation of the Engagement Plan

a. Notes or correspondence on how the Engagement Plan was created in collaboration with the IPLC:

b. Describe how the final terms of the plan were communicated to the IPLC:

8. Review and update the Engagement Plan

a. Dates for periodic reviewing and updating:

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b. Dates of updates reflecting changes in the TNC team, IPLC or goals, work plan or budget of the initiative:

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Questions to Consider for the Engagement Plan

- Would it help to reach out to other organizations who have worked with the IPLC to learn more about the IPLC's formal and informal decision-making process?
- What steps have you taken to ensure that the IPLC representatives with whom you are speaking have legitimacy in the eyes of the wider community they purport to represent?

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