National Estuarine
Research Reserve System
Science Collaborative

Determining Participant Roles

All collaborative science projects engage and are responsive to the project's intended users. In addition, many projects also involve participants who offer a unique perspective or important resources to support the work. This tool will help you characterize the interests of project users and other potential participants to help you deepen your relationships and develop appropriate roles in the project.

Note: The amount and type of engagement with intended users and other participants will vary depending on the project context and purpose, and more participation is not necessarily better if it does not help meet the project's objective.

Identifying Potential Participants

Examples of potential participants and their contributions are outlined here.

- **Intended Users** are the target recipients of the products of a collaborative science project. It is essential for intended users, or their representatives, to be engaged in a project because they are the people who understand and can explain the knowledge needed and who can convey (and sometimes test) the content and form of project outputs that would be most useful to their management decision-making. Project teams may find it helpful to distinguish between primary and secondary users.

    - *Primary intended users* are those users most instrumental in developing the project and who stand to benefit the most from the outputs. Primary users are usually involved in proposal development, often serve on an Advisory Council or Steering Committee to the project, and sometimes serve on the project team.

    - *Other intended users* can also benefit from the project and may use its products even if they are not necessarily involved in project planning. It can be helpful to document how these users could apply project products and benefit from the project — they may have a limited advisory role in a project, receive some project communications, or benefit from the project through unanticipated ripple effects down the road.

- *Stakeholders* are people who will be affected in some way by the project's activities or eventual application of project products. This includes homeowners or recreationalists that might be bothered by field equipment or that could benefit from better-informed management resulting from the project. In some cases, stakeholders could become unexpected champions or detractors of the project, and it could be helpful to keep them informed of project activities and be responsive to their concerns.

- *Information providers* bring a unique perspective or expertise and can help the team better understand the ecological, social or policy context of the project. For

example, informants may have deep local or cultural knowledge that can prompt new questions and ideas that enhance the impact of the project.

- *Liaisons* can serve as important connectors to communities or groups that are difficult for project teams to engage directly. For example, some projects identify liaisons that can foster communication between the project and Indigenous communities or homeowner associations that might benefit from the project or offer key insights but are not able or interested in participating directly in the project.

- *Resource people* are not formally on the project team but have resources to contribute, such as a model, data, lab, tool, boat, or land access. This includes scientists and others that find the project compelling. Acknowledging these leveraged contributions in proposals and reports is important.

- *Mentors* can offer guidance and advice to project teams, particularly for projects that are adapting a technique or science generated in one system to another location.

- *Volunteers* can support a range of project activities, including field sampling, restoration project implementation and maintenance, or outreach and education. Volunteers might include youth, teachers or fishermen, or others interested in citizen science, and their contributions should be recognized and celebrated.

Identifying appropriate roles

Here are some questions to consider as you decide whether and how to engage potential participants in a collaborative science project.

- What is the individual or group's interest and motivation for getting involved?
- What does each have to potentially contribute to the project?
- How engaged does each want to be?
- Who do we need to **keep informed** of project activities and products?
- Who do we need to **consult with periodically** in order to get feedback on specific project activities or products?
- Who do we need to **involve more actively at times** in interactive dialogue in order to better understand differing perspectives and to get new ideas?
- Who do we need to **directly collaborate with throughout the project** in order to maintain our focus on key management needs, incorporate essential expertise, and ensure products will be relevant and usable to intended users?

For intended users, specifically:

- Consider if and how they should be involved in the development and implementation of the project, e.g. to help define the project goals; shape core project activities; or test / review products etc.
- How frequently do you need to meet in order for them to play this role?

- Is a primary intended user or other role more appropriate given the user's interests, time constraints and potential contributions?
- Are there ways to incentivize the participation of key intended users, for example by offering financial support or making participation less time consuming?

Determining Participant Interests and Roles

Using the above definitions and questions as a guide, describe potential project participants by completing a row for each. Add additional lines as needed.

Potential participant	Interest in the project	Potential contribution to project	Role (user, stakeholder, mentor etc.)	Type of Involvement

This tool is part of an online Guide to Collaborative Science and was developed by the National Estuarine Research Reserve System's Science Collaborative Program.