

Strategy To Optimize Resource Management of Stormwater

STORMS Engagement Plan



DIVISION OF WATER QUALITY

STATE WATER RESOURCES CONTROL BOARD

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Table of Contents

1. Purpose and Scope of the Engagement Plan.....	3
2. Priority Audiences and Objectives	4
3. Engagement Methods and Process.....	5
4. How Engagement Results Are Used	8
5. Phasing and Adjustment Over Time	10
Appendix A: Priority Audience Groups	13
Appendix B: Engagement Record Template.....	16

1. Purpose and Scope of the Engagement Plan

The Strategy to Optimize Resource Management of Stormwater (STORMS) program depends on meaningful engagement with external partners to shape STORMS projects and priorities. This engagement plan (Plan) describes how STORMS staff (referred to as staff) will approach engagement across current and future project cycles, so that listening to stakeholders is purposeful, efficient, and directly connected to what staff deliver.

For a quick-start checklist, see [Section 2.3](#).

The Plan focuses on engagement that helps staff:

1. Identify unmet needs and opportunities that may not be visible from within state government
2. Test whether proposed projects are useful, feasible, and equitable for the people who would use or be affected by them
3. Refine, add, or retire project ideas based on what staff hear from partners and communities, using the Project Idea Intake Form to document each new idea

The Plan is intentionally narrow, focusing on project engagement. It does not attempt to cover broad public education campaigns, general awareness-building, or media outreach. Those activities may be designed through separate outreach efforts or project-specific communication strategies. Here, the emphasis is on two-way conversations and other mechanisms that bring outside perspectives into project development and staff decision-making.

Because project priorities evolve over time, the Plan is designed to support engagement across current and future STORMS work. The Plan does not set project priorities or establish project review criteria. Instead, it provides a consistent process for identifying who needs to be heard, choosing appropriate engagement methods, documenting what staff hear, and using that input to support project development.

Engagement activities will be guided by the following goals:

1. Bring in perspectives from implementers and communities that have not been well represented in past state-level stormwater work
2. Ground-test assumptions about barriers, opportunities, and co-benefits in the places where projects would be implemented
3. Investigate new project ideas, refinements, and gaps that improve the usefulness and feasibility of the project portfolio
4. Keep each engagement activity tied to specific questions, decisions, or work products, avoiding unnecessary, duplicative, or purely performative efforts

The sections that follow describe:

1. Which audiences will be prioritized and what staff need to learn from them
2. The core methods and processes staff will use to engage those audiences

3. How input from engagement will be organized so it can be used in project ideas, advisory discussions, and internal decisions
4. How engagement activities will be phased and adjusted over time as the project portfolio evolves

2. Priority Audiences and Objectives

To keep engagement focused and manageable, the Plan categorizes stakeholders into priority audience groups. Each audience group is defined by the role they play in planning, permitting, funding, implementing, or living with stormwater projects, and by the kinds of information they can offer that staff cannot obtain from internal analysis alone.

Over time, project needs and priorities may change, and staff may adjust priority audiences accordingly. The audience categories below are intended as a durable framework that can be reused across project cycles, even as individual projects, partners, and engagement questions change.

2.1 How staff should define priority audiences

When identifying who to engage, staff will consider three basic questions:

1. Who is directly affected by the kinds of projects staff are considering, especially in disadvantaged communities, communities of color, and other overburdened communities?
2. Who must design, operate, fund, and review those projects for them to succeed in practice?
3. Who has been missing or underrepresented in prior state-level stormwater conversations, but has relevant knowledge or lived experience?

To help answer these questions, staff may use available screening and demographic tools, including CalEnviroScreen, local demographic or GIS tools, and language-access information such as the Linguistic Isolation Tool, together with project knowledge and partner input. Priority audiences are then grouped by their roles rather than by individual organizations. Specific entities and representatives within each group may vary from project to project.

2.2 Current priority audience groups

For any project or planning effort, the responses to questions in [Section 2.1](#) will guide who needs to be at the table. To support this audience selection process, the Plan includes a living reference list of priority audience groups in [Appendix A](#).

Appendix A describes each audience group in more detail, explains why each group is important to the project portfolio, and lists the main engagement objectives for working with that particular group. The audience group list is not fixed. Staff may add, remove, or revise audience descriptions as new partners emerge or priorities change, without changing the core sections of the Plan.

When designing engagement for a specific effort, staff may:

1. Review Appendix A to identify which audience groups are most relevant
2. Confirm that the objectives in Appendix A address the project needs
3. Update or supplement Appendix A if new types of partners become important for that work

2.3 Using this Plan to start engagement

When staff begin planning engagement for a specific project idea, they may use this Plan in four quick steps:

1. **Define the starting point and phase.** If the project is already defined, identify the current phase of the project. If starting from scratch, treat the “project” as an emerging idea and begin in [Section 5.1](#) to understand problems, test assumptions, and identify potential new STORMS project ideas for portfolio consideration.
2. **Choose priority audiences.** Use the questions in [Section 2.1](#) and the descriptions in [Appendix A](#) to decide who needs to be at the table for this project and why. After selecting priority audiences, staff will confirm they can answer the questions in [Section 3.1](#).
3. **Select engagement methods.** Use [Section 3.2](#) to pick one or two methods that fit the questions, audiences, and time available. Use the Engagement Record Template in [Appendix B](#) to plan the activity and complete the required fields before the activity begins.
4. **Capture and use what you hear.** Summarize each Engagement Record as described in [Section 3.4](#), then use [Section 4](#) as a guide for incorporating engagement insights into project ideas, discussions, and internal decisions.

These steps are intended as a simple checklist so that staff who are new to engagement can move from an initial need or project idea to a concrete engagement plan without needing additional instructions.

3. Engagement Methods and Process

This section describes planning and implementing engagement activities, so they are purposeful, efficient, and directly applicable to project work. The intent is to use a small set of repeatable methods and to maintain clarity about the question, audience, and product for every activity.

3.1 Principles for choosing engagement methods

Before beginning any activity, staff will address and document four key questions:

1. What decision or question is this engagement meant to inform?
2. Which audiences are best positioned to inform that decision?
3. What method is the best fit for the level of detail and time available?

4. What information will come out of the engagement and who will use it?

Staff will use the Engagement Record Template in [Appendix B](#) to document the planning answers above and to record what was heard after the engagement activity. If the answers are not clearly addressed before the engagement activity, the activity will be redesigned or postponed. Engagement without a defined purpose, audience, and product is not a good use of staff or participant resources.

3.2 Core methods

Most staff engagement efforts can be carried out with a small toolbox of methods, listed below. As appropriate to the audience, staff may use in-person, remote, or hybrid formats, schedule activities outside standard work hours when that would reduce participation barriers, and provide translated materials or interpretation, including Spanish and other languages as needed. Staff will document each engagement activity using the Engagement Record Template in [Appendix B](#) and, when feasible, share a summary back to participants to check accuracy. In most cases, staff will complete the record within five business days of the activity while details are fresh. Staff will write Engagement Records so they may be shared with participants, avoiding sensitive or personal information. If an activity involves nonpublic or predecisional information, staff will prepare an internal record and share only a short external summary as appropriate. This is an accuracy check, not an approval step, and it can strengthen trust over time.

1. **Targeted listening sessions:** Small, topic-focused conversations with a handful of participants who share a similar role or experience. These are useful when staff need nuanced insight into a specific question such as barriers to success for a specific type of project, uncertainty about how regulatory requirements apply, or how an idea is perceived by a particular group. The expected product is a brief summary that captures what is new or important for the particular project, including specific examples where possible.
2. **Interviews and small group conversations:** Structured conversations with individual partners or small mixed groups that bring complementary perspectives. These are useful when staff need detailed input from specific roles, such as regulatory or permitting staff who review projects, municipal stormwater program staff, school district facilities and maintenance staff, Tribal government staff, or technical specialists involved in design, operations, or monitoring. The expected product is a short note that highlights key points, concerns, and ideas that should affect project idea design or prioritization.
3. **Focused surveys or questionnaires:** Short sets of questions shared with a defined audience when staff need to hear from a wider audience about a specific topic. Examples include preferred types of state support, typical timelines and constraints, perceived usefulness of potential tools, or priorities among a set of options. Surveys should be brief and designed so that responses can be summarized quickly. The expected product is a brief summary of recurring themes, ideas, or needs identified by the defined audience for the survey topic.

4. **Workshops and roundtables:** Structured sessions that bring multiple audience groups together when knowledge transfer is important. These are useful when staff need to explore options with several partners at once, compare experiences across regions, or test early project ideas in a group setting. Staff will use workshops sparingly and design them around specific questions and clear outputs, such as refined idea options, a short list of unresolved issues, or a shared view of priorities.
5. **Written input and document review:** Invitations for partners to react to ideas, draft documents, or specific questions using email or other written communication. This is useful when people have limited time for meetings but can provide targeted feedback on draft documents. The expected product is a compilation of comments organized by theme so that they can be incorporated into document revisions.

The above methods can be combined, for example, staff could use a survey to identify themes, then hold one or two listening sessions to explore those themes in more depth.

3.3 Designing an engagement activity

An engagement activity is a specific use of one or more core methods in Section 3.2 for a defined purpose and audience. Staff will use the Engagement Record Template in [Appendix B](#) to plan and document each activity, completing the required fields before the activity begins.

Questions should focus on information staff do not already have. Strong questions reveal missing information, practical constraints, or new ideas rather than repeating what is already documented in past reports or meetings.

3.4 Capturing and organizing what staff hear

To make engagement useful, staff will capture what they hear in a format that is easy to use later. Staff will document each engagement activity using the Engagement Record Template in [Appendix B](#). Engagement Records may be used to:

1. Update or refine project writeups and charters
2. Identify new ideas that should be considered
3. Prepare materials for advisory discussions, including with the Feedback, Leadership and Outreach (FLO) Advisory Group
4. Provide brief synopses for leadership on what staff are hearing over time

Staff will store Engagement Records in a shared engagement folder so they are searchable and reusable across projects. The goal is concise, consistent documentation that supports decisions.

3.5 Avoiding unnecessary work

To avoid unnecessary or duplicative engagement, staff will regularly consider the following:

1. Have staff checked whether another Water Boards program is already engaging this audience on similar topics?
2. Have staff reviewed existing information and confirmed that a new engagement activity is needed?
3. Have staff considered whether existing community meetings or public forums could be used instead of creating a new activity?
4. Are staff asking questions that the audience can meaningfully answer?
5. Do staff have a clear plan for how and when responses will be used?

If the answer to any of these questions is no, staff will adjust the activity design, coordinate with existing efforts, use available information, or reconsider the need for a new engagement activity before moving forward.

4. How Engagement Results Are Used

Engagement is only useful when participant input leads to clearer priorities, better-shaped initiatives, well-timed action, stronger project ideas, and visible adjustments in how work is done. This section describes how engagement insights inform project development, advisory discussions, and internal decision-making.

4.1 From engagement activity to usable insight

Every engagement activity will result in a concise, usable Engagement Record rather than a transcript. Staff will document each activity using the Engagement Record Template in [Appendix B](#) and the guidance in [Section 3.4](#).

4.2 From idea to project concept

Engagement Records documented under [Section 3.4](#) are used to shape project ideas before developing a Project Concept Note. In practice, staff will use what they hear to:

1. Refine or adjust existing project ideas
2. Identify new ideas that were not evident before the engagement
3. Flag ideas that appear unrealistic for partners to implement or support
4. Clarify where audiences agree, disagree, or have unanswered questions

When staff develop or revise a Project Idea, they will note which Engagement Records informed the change and what input was most influential. This does not require a long narrative, only a clear link between what was learned and how the idea evolved. Project Ideas that advance are documented in a Project Concept Note for advisory review, as described in Section 4.3.

4.3 Role of advisory discussions

Staff may use advisory bodies, such as FLO, to review Project Concept Notes alongside Engagement Records. Advisory discussions can help:

1. Confirm whether a Project Concept Note reflects what was heard from priority audiences and identify what changes would improve alignment with that input
2. Consider whether the Project Concept Note includes enough information to support the advisory discussion and identify where additional engagement may be needed.
3. Identify missing perspectives or additional engagement that would strengthen a Concept Note before a decision is made
4. Identify risks, opportunities, or interactions between Concept Notes that staff may not see on their own

Advisory groups provide input. Water Board staff and leadership remain responsible for decisions about which projects move forward and how they are prioritized. Details on how FLO operates and how it provides input are described in the FLO Charter.

4.4 Internal decision making and documentation

When staff decide to advance, reshape, park, or close a project idea, they will briefly document their reasons in the Project Idea Intake Form and link to the relevant Engagement Records. The form will include the decision, the date, the reason, and a brief note on any engagement input that influenced the decision. This can include:

1. Key partner input that supported advancing or reshaping the project idea
2. Concerns that led to a change in scope, sequencing, or timing
3. Reasons for parking or closing the project idea

The goal is to make the connection between engagement and decisions visible without adding unnecessary work.

4.5 Closing the loop with participants

Where feasible, staff may let participants know how their input was used. This follow-up is distinct from the accuracy check described in [Section 3.2](#), where staff may share a brief summary soon after the activity to confirm accurate capture. Staff will note planned follow up in the activity's Engagement Record. Closing the loop is most appropriate for:

1. Targeted listening sessions and interviews or small group conversations
2. Workshops and roundtables
3. Surveys or questionnaires when results are used to make a clear decision or change direction

Closing the loop may be done through simple actions, such as:

1. Sending a brief "how we used your input" note that points to the next step or decision

2. Including a short “what changed based on input” note in project updates or meeting materials
3. Mentioning in a later meeting with the same audience how earlier input affected the current approach

Closing the loop helps build trust, reduces fatigue, and shows that engagement is more than a formality. The scale of follow-up will match the scale of the activity and the time available, and will not require formal reports for every interaction, such as short phone calls or simple email check-ins.

5. Phasing and Adjustment Over Time

Engagement needs will change as projects move from ideas to implementation. The Plan is meant to be flexible so that staff may scale engagement up or down and shift focus as work evolves, without redesigning the entire approach.

5.1 Project engagement phases

Most projects do not require the same level of engagement at every step. As a starting point, four broad phases can be considered, with the appropriate phases selected for each effort.

1. **Idea Intake: Exploring needs and ideas.** Engagement identifies and documents potential new Project Ideas, clarifies problems, and tests assumptions. Activities focus on listening to priority audiences about gaps, what is already working, and where State support could make a difference.
2. **Concept Development: Co-shaping ideas.** Engagement follows advisory discussion of a Project Concept Note to address gaps or missing perspectives and to update the note, as needed. Activities focus on targeted follow-up with the most relevant audiences to fill specific information gaps, test feasibility assumptions, and strengthen the Project Concept Note.
3. **Implementation Checkpoints: Supporting implementation decisions.** Engagement assesses whether implementation approaches, guidance, or tools are understandable and workable while also informing adjustments at key checkpoints. Activities focus on specific questions about usability, clarity, and potential risks, and may include targeted testing with likely users.
4. **Portfolio Learning: Reflecting and learning.** Engagement examines what worked, what did not, and what should change next time, including whether focus areas or priority audiences need updates. Activities focus on lessons to inform future projects or updates to how the STORMS Unit operates, rather than reopening past decisions.

For any given project, staff may note which phases are needed and design engagement activities accordingly.

5.2 Planning engagement at the portfolio level

The STORMS Unit often has several projects underway at the same time. To keep engagement manageable across the portfolio, staff may:

1. Map which projects are entering the Idea Intake, Concept Development, Implementation Checkpoints, or Portfolio Learning phases.
2. Review the map to see which audience groups are being engaged and how often
3. Adjust timing or method to avoid repeatedly asking the same partners similar questions in a short period
4. Identify opportunities to combine engagement for related projects when this reduces burden and still produces clear results

This planning may be managed in a simple shared tracker or planning calendar and updated as projects accelerate, slow down, or change scope.

5.3 Light monitoring and reflection

Staff may use simple reflection questions during a yearly review to check whether engagement is serving its purpose. Examples include:

1. Did engagement bring in perspectives that were not already represented in internal discussions?
2. Did what we heard lead to a change in project ideas, priorities, or timing?
3. Are we hearing from the same voices repeatedly, and if so, who is still missing?
4. Are participants able to see how their input influenced next steps?

Staff may capture brief answers to these questions in periodic internal check-ins or short planning memos. Over time, staff may use those reflections to adjust priority audiences, engagement methods, and the overall approach described in the Plan. Staff may also share brief takeaways across the STORMS Unit or with related Water Boards programs when doing so would help coordinate engagement, reduce duplication, or identify related projects that could engage audiences together. Shared takeaways should focus on transferable lessons, overlapping audiences, timing concerns, or coordination opportunities, and should avoid sensitive, confidential, Tribal, or predecisional information unless sharing is appropriate.

5.4 Updating the Plan

This Plan is intended to guide staff across multiple project cycles and will be treated as a living document. Staff may update it as needed when:

1. New types of projects create the need for different priority audiences or engagement methods
2. Advisory structures or related project review processes evolve in ways that affect how engagement results are used
3. Staff and partners identify simpler or more effective ways to achieve the same goals

In addition, the STORMS Unit will conduct a brief yearly review to confirm the Plan still reflects current practice and to update the appendices as needed. Updates may include revisions to priority audience groups, engagement methods, documentation practices, or the Engagement Record Template. The core purpose of the Plan remains the same: to make engagement focused, efficient, and clearly tied to how staff shape and deliver the work.

Appendix A: Priority Audience Groups

This appendix describes the priority audience groups that staff engage most often when planning and developing projects. The groupings are based on roles rather than individual organizations and may include direct engagement with residents and community members, when appropriate. The appendix explains why each group is important and what is typically learned through engagement with that group.

This list is intended to evolve over time. Staff may revise descriptions, add new audience groups, or retire groups that are no longer relevant without revising the main sections of the Plan.

1. Emerging stormwater cities and smaller implementers

This group includes smaller Municipal Separate Storm Sewer System permittees, emerging second-mover cities, counties, and special districts that are beginning or expanding stormwater capture and use efforts, often with limited staff and competing priorities.

Engagement objectives with this group are to:

1. Understand practical barriers and decision points that shape whether and how they participate in regional projects or economic approaches and policies
2. Learn what kinds of tools, guidance, or templates would make it easier to plan, fund, operate, and explain stormwater projects locally
3. Identify project ideas that reflect their capacities, rather than the capacities of larger regional programs

2. Schools and school-centered partners

This group includes school districts, county offices of education, facilities and operations staff, and intermediaries that work closely with campuses and communities (for example, nonprofits or collaboratives focused on schoolyards, youth, or health).

Engagement objectives with this group are to:

1. Ground-test assumptions about barriers and opportunities on school sites, including facilities constraints, staffing, and coordination needs
2. Learn how stormwater projects interact with school priorities such as safety, heat, accessibility, and student well-being
3. Identify ways project ideas can support, rather than add to, the workload and risk perceived by school decision-makers

3. Tribal governments and organizations

This group includes federally recognized and non-federally recognized California Native American Tribes, Tribal governments, Tribal councils or leaders, Tribal environmental and cultural resource staff, Tribal natural resource staff, and Tribal organizations, as appropriate. Engagement with Tribes should recognize their sovereign status,

government-to-government relationship with the state, and distinct cultural, legal, and confidentiality considerations.

Engagement objectives with this group are to:

1. Coordinate with Tribal Affairs and appropriate Tribal contacts to understand how each Tribe wants to be engaged
2. Identify Tribal priorities, concerns, and knowledge related to stormwater, land, water, cultural resources, and community well-being
3. Protect confidentiality and avoid sharing sensitive cultural, location, or resource information without appropriate direction
4. Support respectful, early engagement that allows Tribal input to shape project ideas before key decisions are made

4. Community-based organizations and communities in overburdened areas

This group includes community members and community-based organizations in disadvantaged communities, communities of color, and other overburdened areas experiencing flooding, trash pollution, heat impacts, water quality burdens, or other stormwater-related concerns. It also includes organizations with trusted relationships in affected communities, such as neighborhood groups, environmental justice organizations, health equity groups, school or park advocates, faith-based organizations, and other local partners.

Engagement objectives with this group are to:

1. Hear how stormwater problems affect communities on the ground and whether proposed solutions would help or miss the mark
2. Identify concerns, priorities, and ideas not visible in administrative records or technical studies
3. Support project ideas that create real roles for communities in shaping and benefiting from stormwater investments
4. Develop ongoing partnerships and working relationships with community-based organizations and trusted local partners

5. Regulatory, reviewing, oversight, and state planning partners

This group includes Regional Water Boards, drinking water and recycled water programs, wastewater collection and treatment agencies, public health and environmental health agencies, local building officials, and other state agency partners, such as the Department of Water Resources, whose planning, funding, or policy roles may affect stormwater projects. These partners may review, interpret, enforce, fund, coordinate, or help align requirements and priorities that affect stormwater projects, including projects that involve diversion, conveyance, or integration with existing recycled water or wastewater infrastructure.

Engagement objectives with this group are to:

1. Identify where expectations across programs are unclear, overlapping, or conflicting for common project types
2. Understand what information or guardrails would help reviewers and partner agencies evaluate or coordinate on capture and use projects more consistently
3. Identify options for aligning expectations, planning priorities, or implementation pathways within existing authorities and update cycles

6. Technical, research, association, NGO, and intermediary partners

This group includes consultants, researchers, non-governmental organizations (NGOs), professional associations such as the California Stormwater Quality Association (CASQA), collaboratives, and regional entities that help design projects, develop tools, convene local partners, or share information across stormwater programs. These partners often work across many jurisdictions and can identify common challenges, needs, and opportunities that may not be visible from one project or agency alone.

Engagement objectives with this group are to:

1. Gather observations on recurring technical, institutional, outreach, or funding barriers that individual implementers experience as isolated problems
2. Test whether proposed project ideas are addressing the most important gaps or duplicating existing tools, guidance, or partner efforts
3. Identify opportunities to build on work already underway, share information through existing networks, and avoid creating parallel or competing efforts

7. Students and future practitioners

Where appropriate, staff may also engage students, educators, and programs that prepare future practitioners (for example, university clinics, technical programs, or youth internships connected to stormwater or related fields).

Engagement objectives with this group are to:

1. Understand how stormwater-related careers and skills are currently perceived by emerging practitioners
2. Identify ways project ideas can support clearer pathways into stormwater work, where that is a stated goal
3. Learn how educational settings can be used to pilot, explain, or evaluate new approaches in a way that benefits both students and communities

Appendix B: Engagement Record Template

Use this record to plan and document an engagement activity. Complete the planning fields before the activity begins, and complete the remaining fields within five business days.

A. Planning information (complete before the activity)	
Purpose of the activity	<i>One sentence describing what this activity is intended to inform.</i>
Activity title	<i>Name for the specific engagement event.</i>
Date	<i>MM/DD/YYYY</i>
Staff lead	<i>Name</i>
Project this supports	<i>Project idea, concept note, chartered project, or work product name.</i>
Project phase	<i>Explore needs Refine ideas Support implementation Reflect and improve</i>
Audience group (Appendix A category)	<input type="checkbox"/> 1 Emerging stormwater cities and smaller implementers <input type="checkbox"/> 2 Schools and school-centered partners <input type="checkbox"/> 3 Tribal governments and organizations <input type="checkbox"/> 4 Community-based organizations and communities in overburdened areas <input type="checkbox"/> 5 Regulatory, reviewing, and oversight partners <input type="checkbox"/> 6 Technical, research, and intermediary partners <input type="checkbox"/> 7 Students and future practitioners
Method used	<i>Targeted listening session Interview/small group Survey/questionnaire Workshop/roundtable Written input/document review Other</i>
Intended use and user	<i>Who will use the engagement output, and how it will be used.</i>
Materials shared (if any)	<i>Slides, draft text, links, or other materials provided to participants.</i>
Participants (roles and organizations)	<i>List participants by role and organization. Avoid personal or sensitive details.</i>
Key questions or prompts used	<i>List up to five questions.</i>

B. What was heard (complete after the activity)

What was heard	<i>Bullets on recurring themes, concerns, and ideas.</i>
New information or insights	<i>What was learned that staff did not already have.</i>
Implications for project ideas or decisions	<i>How this input could change scope, sequencing, design, or whether an idea should move forward.</i>
Specific examples (optional)	<i>Short examples that illustrate the themes, used when issues are complex.</i>
Areas of agreement and disagreement (optional)	<i>Note where participants agreed and where perspectives differed.</i>

C. Follow-up and closeout (optional)

Planned follow-up with participants (if feasible)	<i>How staff will close the loop (example: brief email note, update in later meeting, link to public summary).</i>
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Follow-up items (optional)

Action item	Owner	Timeframe

Notes: Staff will write Engagement Records so they may be shared with participants. Avoid sensitive or personal information. If the activity involves nonpublic or predecisional information, prepare an internal record and share only a brief external summary as appropriate.