QUICKSTART STAKEHOLDER ENGAGEMENT CANVAS: Analysis

Stakeholder name Contact info		*Stakeholder proxy* *Contact info*	
Assess stakeholder motivations		**Assess our motivations**	
What is important to the stakeholder? *What motivations, objectives or goals (explicit or implicit) might they have?* What might they <u>need</u> from the effort? What might they <u>want</u> or <u>expect</u> from the effort?	**What perspectives, resources, access or benefits can the stakeholder provide or block?**	**Characterize the stakeholder relative to our effort:** ❑ Ally/ advocate ❑ Neutral ❑ Opponent ❑ Something else: _____	**What do we NEED from this stakeholder?**
	What relevant first-hand experience (e.g., lived experience) does the stakeholder have?	**Why do we want to engage with this stakeholder?** *How does this support our effort's objective?*	**What will this engagement lead to?**
How does the effort impact the stakeholder? *How do they benefit or experience harm? Consider financial, professional, health, communal or social opportunities, access, experience, etc.*	**What power does the stakeholder have over the effort?** *Consider power as shaping, regulating, or influencing the effort* Over others?	**What other assumptions and biases do we have about this stakeholder?** *Individual, system, explicit, implicit…*	
Assess	**What have we learned/discovered that will help us be successful when engaging the stakeholder?** *If we have divergent views, how might we be successful?*		

QUICKSTART STAKEHOLDER ENGAGEMENT CANVAS: Engagement

Stakeholder name **Contact info**	*Stakeholder proxy* *Contact info*	
Describe your current relationship with this stakeholder What have past engagements been like?	**What relevant historical harm may surround this stakeholder and/or their community?** *If we don't know, how might we find out?* How can we be mindful of this in our engagement?	**How might this engagement be wildly successful?** How will we know we've achieved the desired outcome from engaging with this stakeholder?
How have we (including those before us) been part of disappointing or missed expectations? *What have we promised to this stakeholder that has not been delivered (currently or historically)?*	**What power dynamics (in their organization, with other stakeholders, etc) do we need to navigate to effectively interact or reach the stakeholder?** *Who influences the stakeholder? Who does this stakeholder influence?*	**How might this engagement go badly?** *Will this engagement create more harm?* What are the prevention strategies available to us? ☐ Engage with proxy ☐ Engage later ☐ Someone else leads the engagement ☐ Research the stakeholder to better understand them, their history, their experience, etc. ☐ Do not engage ☐ Something else: _____
What's the best way to reach the stakeholder or proxy? *Text, phone, in-person, email, social media, something else*	*Do we need someone to connect us? If yes, who?*	**When do we interact?** *Key dates/ events? How often?* *Does this need to change?*

Decide	**Next Steps** *(These can be internal or external actions)* _____ will _____ via _____ on/by _____ (Person) (action) (method/medium) (date)	In our next engagement, the **key message** is: And the **desired outcome** is:

TOOL TIPS: QuickStart Stakeholder Engagement Canvas

A quick way to begin developing a plan for effectively engaging a stakeholder.

Session Length: 60+ minutes
Group Size: Individual or up to 8 people
Prep Time: 5 minutes

WHEN

Assessing and developing a plan for effectively engaging with stakeholders is best early in the process, but it's an important step whenever you need to interact or collaborate with the people involved, interested, or impacted by your project. Recognizing stakeholders needs, wants, and influence will help you better navigate your effort towards success.

Use this in combination with the ITK Stakeholder Identification Canvas to begin developing your stakeholder engagement strategy for each stakeholder. Revisiting your engagement strategy throughout the phases of a project will ensure that the right set of people, groups, and organizations are involved at the right time.

WHY

This tool will help you evaluate why and how to begin engaging with each stakeholder. In addition, this tool helps your team identify actionable Next Steps to move forward.

HOW

STEP 1: Begin with the "Analysis" side of the canvas. Fill in the necessary contact information for the stakeholder and/or their proxy.

STEP 2: Begin with "Assess Stakeholder's Motivations" (left-hand side of canvas). The questions can be answered in any order.

STEP 3: Next, answer the questions in "Assess Your Motivations" (right-hand side of canvas). These questions can also be answered in any order.

STEP 4: Now move to the "Assess" box, which is at the bottom of this canvas. Reflect upon and summarize what you have learned or discovered about the stakeholder that is important for successfully engaging with them.

STEP 5: Flip to the other side of the canvas: "Engagement." Re-enter the stakeholder and proxy contact information.

STEP 6: Move on to the main section of the canvas, which has 8 question areas. Answer the questions in any order.

STEP 7: Lastly, go to the "Decide" box at the bottom of this canvas. Decide who will be responsible for taking the next action, what that action is, through which method or medium, and by which time or frequency. Also discuss the key message and desired outcome in the next engagement with the stakeholder.

Definitions

Stakeholders are individuals, organizations, or groups who are involved with, can influence, or will be impacted by the effort. *Lived experience* means having personal knowledge or first-hand experience of a problem. *Historical harm* are past injustices passed to current generations who continue to experience subsequent harm. *Community Partners* is sometimes the preferred term for those stakeholders with lived experience.

In some situations, the stakeholder cannot be directly engaged with and the team must connect via an intermediary person or organization who represents the stakeholder's community. The *proxy* is this intermediary.

Question Bank *(to help guide the discussion)*

1. What does the stakeholder's influence, position power or authority look like?
2. How could the stakeholder contribute to our effort?
3. How might the stakeholder help us think differently?
4. Is the stakeholder responsible, accountable, consulted, or informed?
5. What pre-established relationship may exist with another stakeholder?
6. Which other stakeholders do they know? Could influence? Could block?
7. What synergies may exist with another stakeholder?
8. What conflicts may exist with another stakeholder?
9. What key connections does this stakeholder create for our effort?
10. What trauma-informed methods are important for successful engagement with this stakeholder?
11. What's the mutual benefit of the effort?
12. What assumptions and biases do other stakeholders have about this stakeholder?

PRO TIPS

- Use this tool for each identified stakeholder, rather than 1 tool for all stakeholders
- It's common for teams to iterate between the ITK Stakeholder Identification Canvas and the ITK Quickstart Stakeholder Engagement Canvas
- After the initial engagement with a stakeholder, continue to use this tool to re-evaluate the best way to continue engaging with the stakeholder.