



Part One: Get Ready > 2. Build your team and map out your process.

# STAKEHOLDER ANALYSIS AND ENGAGEMENT WORKSHEET<sup>21</sup>

Collaborative change processes depend on maximum appropriate stakeholder involvement to create robust, collectively owned plans and the network of relationships necessary to implement change. Stakeholder analysis is a disciplined thought process that considers who to involve and how to involve them to enrich the thinking, strengthen the network and achieve collective impact. This is important because stakeholder analysis creates an initial understanding of key issues and sets the foundation to deal with people’s concerns and tap their expertise in proactive ways that build agreement.

Involvement from stakeholders is best when it’s proactively facilitated by a Race, Equity and Inclusion Strategy Team at the beginning of its change process. The stakeholder analysis helps identify issues and clarify perceptions about who needs to be included in the change effort and why.

In the Making the Case for Change tool earlier in this workbook, you identified stakeholders and wins. Now use this worksheet to record your team’s detailed thinking about your stakeholders so you can plan how to engage them in the process. Then decide together how to test your thinking with some of your stakeholders. The examples in this toolkit focus primarily on your staff and board, but this worksheet can also be used to think through engagement with external stakeholders including community leaders, neighborhood residents and business leaders. Some of the engagement ideas will be more appropriate to community change work.

### INSTRUCTIONS:

#### Column A: Key Stakeholders

Begin by listing individuals and groups who are important stakeholders for the change you want to make. A stakeholder is any person (or group of people) who:

- Is likely to be impacted by the outcome of the decision
- Voices unheard or marginalized perspectives
- Functions as a connector in or across sector(s)/field(s)
- Is in a position to implement the decision
- Is in a position to prevent it from being implemented
- Has relevant information or expertise
- Has informal influence without authority
- Is responsible for the final decision

#### Column B: Support

Indicate each stakeholder’s current level of support for the changes.

- + = SUPPORTIVE
- 0 = NEUTRAL
- = OPPOSED
- ? = UNKNOWN

#### Column C: Issues, Wins, Mindset

Identify issues that are important to each stakeholder/stakeholder group.

- What would a win/good outcome be from their point of view?
- What would influence them to support the change effort? What do they need in order to support the change effort?
- What else might be drawing their attention and energy at this time?
- Other notes about their current mindset or concerns

#### Column D: Engagement Strategies

Determine how to involve each stakeholder/group. Possible Stakeholder Involvement Strategies could include:

- Invite them to join the Race, Equity and Inclusion Strategy Team (recruited or volunteer members from a given stakeholder group, thinking well about not relying on a single person to represent a group)
- Invite them to join a short-term task force or project team (e.g., research or story-gathering on a particular topic)
- Invite them to a one-time focus group/group discussion
- Administer a survey
- Conduct door knocking and one-on-one’s
- Facilitate an oral history/story-sharing project or event
- Invite them to community meetings/town halls/public forums

- Invite them to house meetings
- “In-reach”—engage with stakeholders (either live or through paper surveys or suggestion boxes) while they’re participating in their ordinary activities (e.g., at their organizational meetings, in health clinics, waiting at the barber shop, on a visit to local businesses)
- Engage via social media and other online platforms
- Ask specific stakeholders to help identify people to participate in any of the above

Note that you might involve a given stakeholder group through multiple strategies (e.g., invite additional staff to join your Race, Equity and Inclusion Strategy Team and administer a survey to the entire staff).

