Developing a Stakeholder Engagement Strategy

Document Outline

1. Connection to the Relevancy Roadmap

This document addresses Agency Capacity Barrier 2 – Agency lacks capacity to identify, understand, engage with, and serve the needs of broader constituencies, Tactic: Create a strategic, comprehensive plan to engage and serve all current and future constituents.

*A **strategy** is a dynamic long-term plan of action designed to achieve a major goal and vision. Strategy begins with the big picture you want to achieve and then breaks that down into various sets of activities. A strategy describes how the ends (goals) will be achieved by the means (resources).*

2. Introduction

Since its formation, the Florida Fish and Wildlife Conservation Commission (FWC) has made a significant policy and strategic commitment to improving engagement with stakeholders and the public. This commitment is based upon acceptance of the principles of Public Trust in fish and wildlife management, recognition of the benefits of effective engagement and appreciation of the improved nature of the Commission's actions and policies when stakeholders and the public are appropriately engaged and involved in FWC decisions.

This strategy will assist staff to be more responsive; to balance conflicting issues; to communicate complex issues to non-experts; to listen and be open to constituent concerns and to effectively manage both the productive and unproductive elements of public engagement. Effective public engagement requires dedication, skill, planning, time and effort as well as politically and socially astute action.

FWC recognizes the crucial role that every staff member makes in this area and is aware of the conflicts that can arise between staff's perception of their expert authority and concerns about the balance between public input and optimum use of staff expertise and professional judgment and maintaining the agency's authority and responsibility for wildlife and conservation.

Stakeholder engagement is a tool to make better decisions that lead to improved and increased conservation benefits to people and conservation outcomes for fish and wildlife. It is NOT an end in and of itself, but it is a means to an end.

3. How this document was created

The author of this document selected a small division in the Florida Fish and Wildlife Conservation Commission (FWC) to use as a pilot project to develop guidance for staff to improve and increase agency engagement with and service to current and future constituencies.

The FWC's Freshwater Fisheries Management Division's (FFM) mission is to manage, enhance and conserve Florida's freshwater aquatic life for public benefit. To achieve this mission FFM must identify its stakeholders and understand what benefits they want relative to the conservation and management of Florida's freshwater fisheries resources. This requires a thoughtful, strategic and comprehensive plan to engage and serve freshwater fishery and related stakeholders.

This document was produced under the Association of Fish and Wildlife Agencies Multistate Grant 2020 - F20AP00187 by Ann B. Forstchen (employee of FWC until 12/7/21). It was informed by personal experience, qualitative interviews with select FWC staff, the FWC Stakeholder Engagement Manual of which Forstchen was a contributor, peer-reviewed literature and popular literature. This is intended to be the first iteration of this document. For more information contact Forstchen at AForstchen@wildlifemgt.org.

4. Purpose and target audience for this document

The purpose of this document is to provide agency staff with information and resources to help them design and implement a strategy to guide, inform, implement and evaluate activities and actions that engage agency stakeholders, including reaching out to and engaging broader constituencies. The audience for this document is anyone that engages with the public. This is not an exhaustive treatment of this important work but a compilation of resources and agency experience.

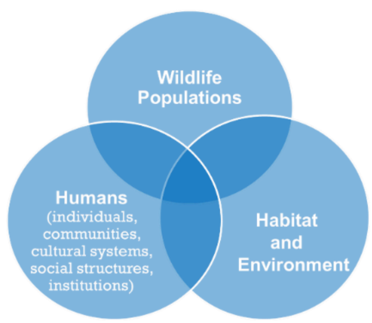
5. Stakeholder defined

A ***stakeholder*** is a person or a group of people that significantly affects or are affected by fish, wildlife or habitat or our management of them (Decker et al. 1996. From Clients to Stakeholder: a Philosophical Shift for Fish and Wildlife Management. Human Dimensions of Wildlife, Vol 1, No.1, pp.70-82.). A stakeholder may or may not be aware they are a stakeholder until an event or issue activates them. Stakeholders can be individuals, a group of individuals that share similar interests or an organized group of people that share similar interests and have a governance structure (e.g., spokesperson or officer of organization). Stakeholders can include agency staff and work units, resource use license buyers, users of the resource, conservation and industry partners, and communities impacted by our work.

Stakeholder engagement means that there is a 2-way interaction with stakeholders. A press release, public service announcement or billboard is not stakeholder engagement. A Facebook post or Twitter post may be part of a stakeholder engagement process as long as there is 2-way sharing of information with the intent of building a relationship with that individual or group.

6. Why do we engage stakeholders?

There are three major aspects of fish and wildlife management: the animals, their habitat and people.

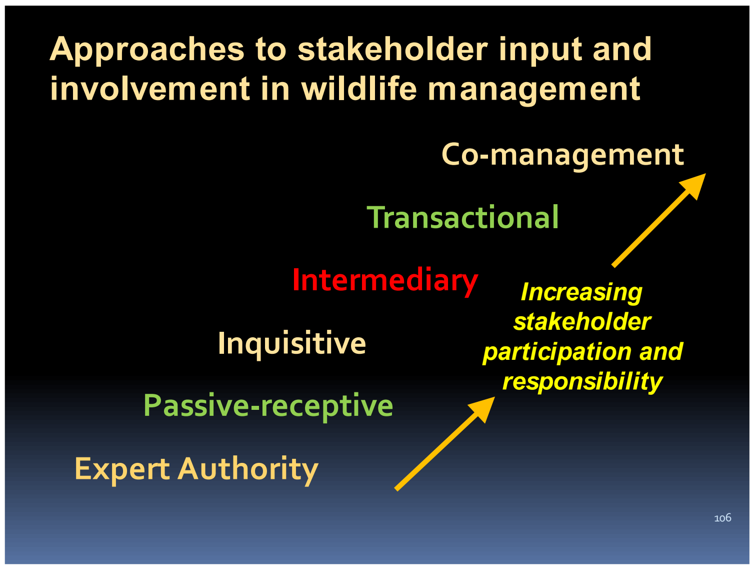


Professional wildlife management work includes discovering, understanding, and applying insights about how humans value wildlife, how humans want wildlife to be managed, and how humans affect, or are affected by wildlife and wildlife management decisions (Human Dimensions of Wildlife, ed. D.J. Decker, S.J. Riley, W.F. Siemer 2nd ed. pg. 3). Stakeholder engagement is how this happens. Ideally, all agency staff should understand and appreciate the value in and the need for involving people in the conservation decisions we make.

Understanding the knowledge, opinions, motivations, needs and expectations of people is vital to successful conservation strategies. Asking, listening, and involving citizens early and regularly is critical to developing and implementing successful projects and effectively addressing issues before they become intractable problems.

Over the years, we and other natural resource management agencies have learned that “durable” decisions, i.e., those that stand the test of time, occur when we understand what affected people need and want, and they are involved in the decision-making process. If we do the work “up-front” to engage people in a decision that affects them, we get a better decision and better acceptance of and compliance with that decision. We manage the resources for the people, we can't do it well without them.

Stakeholder engagement is a fundamental element of public sector organizations. In conservation agencies there are multiple approaches to stakeholder engagement depending on the context and urgency of the issue. Chase et al. described this continuum as seen below.



From: LC Chase, WF Siemer, DJ Decker. 2002. Designing stakeholder involvement strategies to resolve wildlife management controversies. Wildlife Society Bulletin.

Increasingly agencies are tending to use approaches on the upper end of this spectrum. As conservation agencies we have a public trust obligation to engage and serve all constituencies people in our states (see: The Role of State Wildlife Professionals Under the Public Trust Doctrine by Christian A. Smith, Journal of Wildlife Management, 75(7):1539-1543. 2011 for information on public trust roles and responsibilities).

Stakeholder engagement is not a public relations or communications exercise, although those activities are part of stakeholder engagement. We cannot just talk to stakeholders that we already know, to those who speak the loudest or regularly attend our commission or board meetings. And we can't assume that the interests, needs and concerns of the stakeholders we currently engage with don't change over time.

Enhancing and maintaining stakeholder engagement builds relationships over time that improve value and support for conservation in general and for the agencies that are responsible for on-the-ground conservation work.

7. Initiating a stakeholder engagement strategy

Ideally, an agency has an overall approach as to why, who, when and how stakeholder engagement work is designed, implemented, evaluated and improved over time. Reality has demonstrated that most state conservation agencies do not have a comprehensive stakeholder engagement strategy and that most stakeholder engagement activities are uncoordinated, ad hoc, and done by staff with limited skills in stakeholder engagement methodologies and are strapped for resources – especially time.

First, some questions to consider when thinking about developing a stakeholder engagement strategy.

- What are the motivations for an agency to engage stakeholders?
- What are the agency expectations from stakeholder engagement activities? What does the agency want to learn from stakeholder engagement?
- How might the agency benefit from engaging stakeholders?
- How might the stakeholders benefit from engaging with the agency?
- Is stakeholder engagement supported by agency leadership? If not, why?
- What priority does the agency place on engaging stakeholders?
- Where in the agency structure does stakeholder engagement reside (e.g., stand-alone separate work unit, embedded within each program or division)?
- What is the current scope of stakeholder engagement?
- Is the stakeholder engagement proactive, reactive or both?
- Generally, are agency stakeholder engagement activities one-off events or ongoing, iterative processes?
- Generally, when in the decision-making processes of the agency does stakeholder engagement happen?
- What are the jurisdictional boundaries of stakeholder engagement?
- What are staff interests, concerns and needs about stakeholder engagement?
- What are the interests, concerns and needs of stakeholders re: engaging with the agency?
- What specifically does the agency want stakeholder engagement to look like and deliver in the short and long-term future?

Answering these questions candidly will provide a solid foundation to build a stakeholder engagement strategy.

8. Stakeholder engagement: desired future conditions, current conditions, gap analysis

One place to start developing a stakeholder engagement strategy is to for key agency staff to determine a set of “desired future conditions” for the agency’s overall approach to stakeholder engagement. Some questions to consider include:

- What stakeholders, that we know are impacted by conservation and our conservation work, are not engaging with the agency? Why?

- What and where are the population segments in our state that we believe may have interests, needs or concerns relative to fish and wildlife?
- What do we want our engagement with our current stakeholders to look like in the future?
- What expectations do we have for all of our stakeholders to know and understand about each other's interests, needs and concerns?
- What skills and resources do our staff need to effectively design, implement, analyze and communicate stakeholder input and evaluate stakeholder engagement events and programs?
    - Which of these is most urgent and important to address?
- What are our motivations and expected benefits to engaging and serving broader constituencies?
- What is our agency philosophy about when, in the decision-making process, do we engage stakeholders?
- What are our hopes and expectations of the stakeholders that will engage with us?
- Do we have preferences on how we want stakeholders to engage with us?
- Are there priority population segments that we want to engage with first?

Next, take the time to explore and examine what is currently happening. Invest in your future and learn from your past efforts. Some questions to consider in this process include:

- Who are we engaging? When? And why them?
    - Who regularly engages with the agency? Who doesn't?
    - What was/is the driver or context for the engagement?
- What were we trying to learn through stakeholder engagement?
    - Were there clear objectives?
- What methodologies were used and why?
- Who is doing the stakeholder engagement work?
- How successful were the stakeholder engagement event(s)?
    - How do you know?
- Did it meet agency objectives (e.g., what did the agency learn/convey)?
    - How do you know?
- Did it meet stakeholder objectives (e.g., what did stakeholders learn/convey)?
    - How do you know?
- How was stakeholder input used in agency decision making?
    - Were they informed of this?
    - Were decision makers informed of the stakeholder input?
- Are stakeholder engagement activities routinely evaluated?
- Did staff have the needed skills for stakeholder activities?
- Did staff have the resources needed for stakeholder activities?
- Looking back, what stakeholder group or population segment perspective were missed?

And finally, it's worth the time and effort to examine the gap between your desired future conditions of stakeholder engagement and your current stakeholder engagement activities. Some questions to consider her include:

- What structures or processes (barriers) are causing the gap?
- What impacts or consequences are happening because of the gap and to whom? (Consider both internal and external consequences)
- What opportunities are we missing because of this gap?
- What additional conservation benefits can we provide if we narrow the gap?
- Who specifically can influence the reduction of the gap and what resources would it take?
- Which gap should we prioritize to address?

Once this analysis is done, the agency can use its established processes to create objectives, strategies and actions.

For more about this situational analysis process that was designed *by* conservation professionals *for* conservation professionals see: Decker et al. 2011. Applying Impact Management: A Practitioner's Guide. Human Dimensions Research Unit and Cornell Cooperative Extension, Department of Natural Resources, Cornell University, Ithaca, NY 119pg.

9. Who engages stakeholders?

Ideally, stakeholder engagement is not the responsibility of any single work unit or group of staff, it is the responsibility of everyone. Every staff member has some obligation to engage stakeholders, but at varying levels of frequency, intensity and subject matter. Each conservation agency is unique in its interests, needs and socio-political environment and will need to adopt its own approach to engagement practices with current and future stakeholders. There is not a "one-size-fits-all" approach. Ideally, stakeholder engagement should not be considered as "add-on" work but as a critical part of staff public trust responsibilities.

10. How do we engage stakeholders?

There are some core principles that guide stakeholder engagement. Stakeholder engagement activities should be:

- Purposeful, focused and relevant to agency priorities
- Objectives for engagement should be clear and transparent
- Timely to ensure stakeholder input informs the agency decision making processes at multiple levels
- Inclusive of all impacted stakeholders, particularly historically underserved stakeholders
- 2-way dialog, listening and sharing (not just communicating outwards)
- Welcoming and easy to access

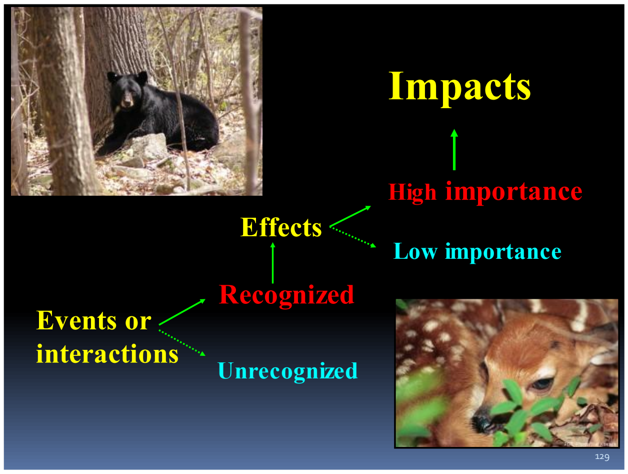
- Have an emphasis on building long-term relationships with stakeholders

11. General stakeholder engagement activity design process

- Understand the why – what is the purpose, objectives and expected outcomes for the stakeholder engagement activity? What decision(s) will it inform?
- Who do you need to engage?
    - Identify the current target audiences (e.g., the usual suspects)
    - Identify the new target audiences (e.g., underserved constituencies)
- Where in the decision process are you? When is it most appropriate to engage stakeholders?
- Who in the agency will be doing what and when?
- Who else in the agency needs to be aware of this activity?
- What methodologies will be used and what is the process for selecting it(them)?
- What support and resources are needed?
- When and where will the engagement activity be implemented?
- Who and how will stakeholder input be gathered, analyzed and communicated by when and to whom?
- Who and how with the stakeholder engagement activity be evaluated and what metrics will be used?
- Who and how will stakeholders be informed about how their input was considered and used?
- Who will take evaluation information and make improvements to the process so that the agency can learn from the event?

12. Identifying and Prioritizing Stakeholders

Key to successful stakeholder engagement activities is identifying and prioritizing which stakeholders to engage. Ideally, an agency would want to engage all stakeholders on every issue, but that is not practical and need to take an adaptive impact management approach.



Impacts are a subset of positive and negative outcomes produced by interaction among fish, wildlife, people and habitat that are regarded by stakeholder as important enough to warrant management attentions (See Riley et al. Essence of Wildlife Management. 2002. Wildlife Society Bulleting Vol 30, No. 2 pp. 585-593). So conservation organizations with limited resources may want to focus their stakeholder engagement actions with those people who are most impacted by an issue. This does not, however, absolve them of the responsibility to seek out stakeholders who might not be aware they are or may be impacted by an issue.

There are multiple methods to identify and rate the importance/influence of stakeholders. Stakeholder mapping is a collaborative process, engaging broad perspectives about an issue to identify a key list of stakeholders. Generally, the process is to brainstorm all possible stakeholders (including individuals and formal organized groups); then analyze and rank their relevance to the topic, analyze their influence, expertise, level of impact by the issue, ability to be collaborative, capacity to engage in decision processes, level of trust, importance to future agency efforts and represent a rich diversity of attitudes, opinions and geographies.

Categories of stakeholders might include:

- Private landowners
- Agency customers (e.g., license buyers, range users, wildlife management area visitors)
- Staff (e.g., current, former and potential employees)
- Industry (e.g., energy development, housing development, agriculture, transportation, media)
- Outdoor recreation industry (e.g., hunting, boating, angling, trapping, hiking, bicycling, wildlife viewing, camping, RVing, horseback riding, snow sports)
- Community (e.g., residents near agency facilities/lands, chambers of commerce, resident associations, schools, community organizations, faith-based organizations and special interest groups impacted by the issue)
- Environment (e.g., sister conservation agencies, forest, mineral & water management agencies, NGOs, individual advocates)
- Government (e.g., elected and appointed officials at federals, state, county and local levels)

One common method to categorize stakeholders is to assign them to level of support for an issue as seen below.

13. Selecting an engagement approach

Conservation agencies engage stakeholders in a wide variety of ways, including:

- Surveys of the general population and specific user groups
- Social science research on the needs, wants, attitudes, preferences of people and the economic impact of their activities
- Forums, meetings and conferences of various types where we listen and discuss issues with people
- In-person and on-line public workshops, webinars and comment periods
- Stakeholder advisory bodies dedicated to specific issues
- Public outreach and publicity to inform people about conservation issues

Each stakeholder engagement effort needs to be customized – one size does not fit all. One stakeholder engagement expert advised - “Fit the forum to the fuss”. Carefully consider the level and scale of the stakeholder engagement effort – what is most useful, what is needed to be learned and from whom and sometimes what is required. Some issues may be resolved with a few phone calls to key people or groups, others may need long-term advisory bodies. They all involve creating relationships with stakeholders with the ultimate intent of improving conservation benefits and outcomes.

Consider:

- What is the issue? (Scale, scope, urgency, etc.)
- Who may be impacted or affected by this project or decision?
- What do we need to learn from stakeholders?
- How do the stakeholders want to be engaged?

Active stakeholders: those who come forward and actively engage with us

- Some enter with goodwill and positive attitudes and good faith, wanting to improve the situation
- Some have the knowledge and skills to be very effective and helpful
- Some are *bona fide* and effective representatives of larger groups
- Some may be openly or deceptively serving only their interests
- Some enter in engagement with well-defined agendas
- Some self-identify and engage, but lack skills experience, or information to be effective
- For some, it's just a job (e.g., a paid spokesperson or lobbyist)
- For some, it's a passion and a mission

"Silent" stakeholders: those that remain silent and usually outside the decision process

- Some will remain hidden – we may never identify or locate them
- Some we do identify but they chose to not participate – the issue may not be compelling enough for them to spend time on
- Some are identified and self-identify as having important impacts from the issues, but are cynical about our processes and believe their interests are better served by remaining outside the process
- Silent stakeholders must not be ignored or forgotten about – they must still be informed and offered the opportunity to engage

Our experience suggests that:

- Single individuals may fall into several of these categories
- Individuals and groups may shift between these categories (e.g., silents become actives, stone-thowers become productives, insiders retreat outside and throw stones)
- You have to reach out to everyone initially, do your best to attract the first three kinds of "actives", but recognize your process has to work with all the others as well
- You cannot avoid these subgroups or completely select or exclude any of them
- Don't treat the spokesperson for an organized group to fully represent the spectrum of perspectives of the group
- You may need to use more than one process to effectively reach them all
- Anticipate "late arrivals" (new individuals or groups that were activated by the issue or our management decision or management action)
- Processes needs to be dynamic and adaptive, modifying in response to moment-to-moment changes and needs

Effective stakeholder engagement involves assembling the best possible mix of active stakeholders, with the largest proportion possible of the productive players, and designing a process so that the less productive actives and silents cannot divert progress and the silents continue to be identified, approached or at least informed.

- Don’t assume because you always did workshops in the past, that workshops are the right technique for your current issue
- The technique you use may be less important than your skill and effectiveness at using it
- No technique can substitute for respect, trust and open communication
- Be transparent, share all aspects of the issue with everyone involved
- Be honest, if the answer is “no, we can’t do that”, say so
- Be willing to say “I don’t know” (and always follow-up with more information later)
- Be respectful - especially when explaining complex topics to non-experts (don’t be patronizing)
- Recognize that stakeholder opinions are based on their knowledge, experience and values and are honestly held and believed. Their knowledge and values may lead them to opinions differently from ours, but it’s disrespectful to assume their views are inherently less valid than ours.
- Recognize how your own opinions were informed by your experiences and values
- Be willing to recognize and accept some stakeholders are more experienced and knowledgeable than we are
- Be fair. Demonstrate that we value all opinions and perspectives

Super stakeholders or stakeholder elites are stakeholders who become very familiar with agency issues, staff and functions, and often are very effective advocates for their positions. It is very easy for staff to fall into the habit of giving such stakeholders preferential treatment and equally easy for these stakeholders to come to expect it. Staff need to consciously protect themselves from this tendency. It is a narrow and sometime difficult balancing act between establishing effective rapport, respect and close social relations with a stakeholder, and providing that stakeholder unfair advantage or deference. There is no simple solution except to invoke equity to other stakeholders.

Stakeholder overload or stakeholder fatigue: stakeholders who represent several interests or who engage with the agency on numerous issues can find themselves almost fulltime engaged in our meetings and activities. They may become fatigued, disillusioned or less cooperative as a result.

It is not practical or smart to engage all stakeholder groups with the same level of intensity, using the same approach. It is also important to be highly selective in choosing stakeholders for ongoing consultation and collaboration. Being strategic and clear about whom you are engaging with—and why—can help save both stakeholders and the agency time and money. Even more important, it will help you manage expectations. When stakeholder groups are consulted and then express opinions and information, only to find no action is taken, this can significantly undermine the perceived value of the engagement and negatively impact agency trust and reputation.

Developing a Stakeholder Engagement Strategy

Use this table to guide your selection of stakeholder engagement approaches.

	Engagement Approach	Overview
	Monitor	Tracking or monitoring stakeholder positions via research or discussion with other parties.
	Message	Adapting communications scope and messaging to meet stakeholder expectations. Creating and targeting messages to specific stakeholders.
	Advocate	Activities to enlist support for a specific effort or position that may have opposition or reflect an actual or perceived imbalance of power. Does not necessarily imply that the agency will change its approach or direction.
	Consult	Soliciting explicit feedback or input on a project or plan. Implies an expectation by the stakeholders that the agency will make concrete changes based on the consultation.
	Collaborate	Initiating or participating in two-way dialogue focused on mutual learning and solutions. Can include co-creation of new ideas and approaches.
	Innovate	Shared work on common objectives of the agency and its stakeholders. Can include co-creation, as well as co-implementation, of new ideas.

The resources available also shape your choice of engagement approach. For example, a more ambitious strategy costs more. Use this table to visualize cost intensity for each approach.

Engagement Approach	**Assigned Staff**	**Time**	**Internal Alignment**	**Format**	**Moderation**	**Feedback**	**Overall**
Monitor							
Message							
Advocate							
Consult							
Collaborate							
Innovate							

Consider how certain external elements, such as elections, change in leadership of the agency or other conservation groups, natural or man-made disasters, might influence your intended engagement event and might change the conversation and outcomes. Think about your selected stakeholder groups and attempt to anticipate their perceptions of the criteria below and adjust as necessary. When the stakes are particularly high for in-person meetings, these considerations apply broadly.

- Authority: In-house versus third-party facilitation, seniority and number of agency staff vs. number of stakeholders, stakeholders' familiarity/expertise with the topic
- Formality: Dress code, look of the presenter, presentation and display materials style and finish, the tone used to address the topic (e.g., passive, authoritarian, empathetic)
- Atmosphere: Effect of the venue's atmosphere (e.g., expensive/cheap, warm/cold, welcoming and social), "branding" of the event with agency logo
- Facilitation type: tailor for your audience (e.g., engaged, hands-off, leading, listening, interactive, or academic)
- Participation style: dynamics of staff and stakeholders in the room, logistics of fielding questions and opinions, handling of grandstanding, capturing of remarks so participants feel heard

14. Planning a stakeholder engagement event

The art of stakeholder engagement does not actually lie in which format you choose, but in how well you match a format to the issue, stakeholder(s), and situation. The scale, scope, and span of the engagement will vary, depending on these specifics and others. A variety of factors can influence your choice of stakeholder engagement format, including:

- Familiarity — How well do you know the issue and the stakeholder(s) involved? What has the relationship been in the past? What research and pre-work has been done already?
- Frequency — Is this one meeting, multiple meetings, or an ongoing dialogue with no defined end?
- Guidance/Facilitation — Will the engagement be managed directly by agency staff or facilitated by a third party?
- Participant Profile — Does the engagement involve individuals, one representative per organization, many from the same organization, or representatives from many different organizations? Are these senior decisionmakers, impacted or concerned citizens, subject matter experts at a technical level, etc.?
- Complexity — Does the engagement involve one issue or multiple issues? What is the level of seriousness, urgency, potential impacts, etc.?
- Trust/Credibility — How much trust exists between the agency and stakeholders on this and other issues? What credibility does each have with the other?

Decide which approach best matches your objectives, including online discussions, teleconferences, webinars, one-on-one meetings, or group meetings, forums, or events.

Develop key messages and stick to them, but actively and genuinely listen to learn stakeholder interests, need and concerns. Engagement is 2-way; co-create the journey to improved conservation benefits and outcomes.

Key Questions	Key Messages
What are we trying to accomplish?	
How will we know that we have done it?	

What barriers constrain us from reaching our goals?	
Etc.	

15. Executing a stakeholder engagement event

Logistics that will help prepare for in-person engagement:

• Determine if facilitation is needed and select a facilitator that is perceived as neutral (whether agency staff or 3rd party)

• Secure an appropriate facility or platform that is easy to use/access, ensure the facilitator and staff know how to use the technology in advance

Logistics that will help during engagement:

• Assure participants understand their roles and responsibilities in the process; help them become more familiar with the topic before the event (e.g., provide background material ahead of event); be aware of cultural dynamics among the stakeholders; anticipate and have a plan to mitigate tension between participants

• Distribute invitations with practical information to participants

• Develop an agenda with clear objectives and expected outcomes and distribute well ahead of event

• Develop rules of engagement and describe the decision-making process; allow for equitable participation in multiple ways; keep on topic and capture out-of-scope items to follow-up on later

• Create engagement materials if needed; if possible, design engagement to be as interactive as possible

• Set up channels of communication during the session and after the session (if desired) (Twitter feed, voting platform, virtual white boards)

• Plan for special needs of participants

Logistics that will help post-engagement:

• Create evaluation criteria and metrics of success prior to event

• Develop a feedback plan and mechanism and execute it asap after the event

16. Evaluating a stakeholder engagement event

In order to measure success and build on your efforts for future activities, be sure to capture the following in writing during the engagement: the original purpose and aims of the engagement

- the methods used
- the participants
- a summary of noted stakeholder concerns, expectations, and perceptions
- a summary of discussions
- a robust list of outputs (decisions, actions, proposals, and recommendations)

This documentary record should be shared with all participants. We want to approach stakeholder engagement more systematically and from a broader view of what's going on, and to share our experiences so we all learn from what works and what doesn't. So don't keep your stakeholder engagement experiences to yourself! Share what worked and what didn't so we can learn and adjust.

17. Analyzing and communicating stakeholder information

Develop an action plan that translates the information, insights, and agreements from the engagement into actions—and then communicate these to your stakeholders.

The approach described below applies to each individual engagement. For ongoing, repeated interactions, the action plan from one engagement should directly inform the planning and execution of the next, and trust and understanding will build over time.

Engagement is ultimately about building ongoing, 2-way communication with those stakeholders that receive conservation benefits. Even after you have finished a set of engagement activities, you should continue communicating with your stakeholders as part of a long-term strategy.

Keep your word: If you say you are going to keep stakeholders updated, do so. Go a step further and tell them how frequently they will receive updates—and through which channels.

Manage expectations: The quickest way to destroy the trust you have built is to raise expectations you cannot meet. Always keep the lines of communication open. Never schedule engagement activities so late in a planning timeline that a given event can't shape decisions or future actions. Do not pretend to want feedback and then do nothing with it. If your goal is mainly to gather information, make this clear from the outset. Most important, let your stakeholders know how their feedback is to be used. Include the results in future engagement plans.

18. Common stakeholder engagement methods

General rules for all methods:

- Have an agenda or program and use it to guide meeting progress
- Have a fixed start and end time and stick to it
- Ensure adequate record of the event is collected, kept and distributed as appropriate

- Record who attended the meeting, including staff
- Set the meeting expectations early, repeat and reinforce periodically
- Provide adequate breaks, meal times etc.
- Avoid long periods of just sitting and listening, make people get up and move around every hour or so
- Actively manage and facilitate the meeting
- Allow and ensure adequate opportunity for all present to make the views known
- Anticipate, recognize and manage the normal progression of group dynamics

Public Meeting (different than a public workshop – see below)

Announce and widely publicize to interested stakeholders and the public. Arrange at a large public venue, often in the early evening, on a weekday to allow working people to attend. Arrange the room with classroom style seating and a front-facing podium. Staff located at the front facing the audience. Recording and speaker timing device are recommended. Present a brief introduction of the topic and issues by staff, including staff's intentions in regard to responses now and later. Solicit speaker cards from those wishing to speak, allow each speaker a specified time (e.g., 3 minutes) to address the group and staff. Time should be strictly enforced. After speakers are done, staff should close proceedings with a general statement of what they heard, major issues, and anticipated responses and next steps.

Staff may or may not respond to speaker questions, but generally should not engage in protracted discussion on issues with presenters or the audience or allow presenters to debate with each other.

Public meetings are customary and often used to solicit comment on agency rule changes and similar discrete topics.

<u>Advantages:</u> simple to arrange and run, limited staff effort and allows a large number of public comments to be collected. Contact information from participants and speakers are useful for subsequent stakeholder follow-up.

<u>Disadvantages:</u> speakers receive little or no immediate feedback for their concerns. Speakers understand 3 minutes of time at the podium allows only perfunctory comment or idea development. This may result in abrupt and extreme comments, or "acting out" for audience supporters. In highly polarized or controversial situations it can also develop into an ugly mob scene with successive attacks by speakers on staff who represent a target for participant resentments, Information received is difficult to quantify or assign a value weighting. This process is sometimes used a proforma response to meet public participation requirements with an insincere intention to listen or respond.

Public Workshop (different than a public meeting – see above)

Distinct from a public meeting, a workshop beings together specific interests with particular skills and knowledge and uses a series of formal techniques to work through an issue and produce a defined end product. Workshops generally require at least a full day, experienced facilitation, careful advanced planning, well-designed prepatory materials and very clear instructions to participants. Participants are usually technically skilled rather than managers or leaders, although workshops of managers or leaders can be very effective to ensure the end product is promulgated back into the organization.

Advantages: The concentration of skilled people for a prolonged period on a well-defined issue can be very productive in generating useful action products.

Disadvantages: very strenuous preparation, meeting management and follow-up requirement. Large time investment of all participants. Participants typically become very invested in the groups' work product and don't like it if staff or commissioners don't accept their end product. Logistical requirement of space, facility, equipment, materials, etc.

Scoping Meeting (nominal group workshop)

A fairly large group of interests and people are invited to participate. After initial background information on the issue from the facilitator and staff and an explanation of process, people break into working groups of 4-6. In each group, people individually write down on cards the issue or problem that they feel is crucial to the topic. Each working group them compiles the individual inputs from every person and prepares a summary of their concerns – grouping same or similar topics, arranging topics in any logical order that the group wishes and assigning priority to the topics. This first stage provides a comprehensive list of all the concerns represented, and without additional work can provide staff with an indication of what issues are important and to whom. In a second stage, the working groups then present their summary to the whole meeting who reviews and discusses all the inputs. The group, with strong facilitation guidance, then attempts to combine the inputs into a single list of topics and concerns that represents the consensus overview and any minority dissenting views. Criteria for the group consensus might be topics identified independently by all or most working groups, or topics agreed to be important by consensus.

Advantages: combines a wide range of inputs efficiently and quickly identifies topics that a large proportion of those present agree are important. Sampling theory supports that with a modestly large group (25-30) chosen from reasonably informed and competent people and constituencies, the method accurately samples the views of much larger populations. The recognition of similar concerns expressed by widely different inters in different working groups builds confidence among participants of the validity of their concern and the attention it will receive from the agency. The initial written inputs provide the raw material for staff analysis and ensure that the shyest, most introverted participant's views are included.

Disadvantages*:* Time consuming (half-day minimum), significant planning input and preparation to set the stage effectively to focus working groups accurately on the target topic.

Forum/Summit A series of presentation from key stakeholders and agency staff presented to an audience that included the other presenters as well as interest groups, stakeholders and the public. This is very similar to a symposium or conference. A summit is essentially the same on a larger and more elaborate scale, bringing leadership of different interests together in the same way. It generally serves to communicate information and points of view but does not immediately generate products or solutions, although sometimes produces expressions of common intent, solidarity and recommendations in the form of meeting resolutions. These may be the foundation for future activity, stakeholder coordination, etc. Requires impartial moderation and can productively develop questions and discussion around presented materials. May also include embedded additional components such as panel discussion, workshops, etc. Production of forum proceeds and reports can be very informative and highlight policy issues and recommendations.

Advantages: Effective way to bring large amounts of high-quality information to a wide audience and may results in fruitful cross-fertilized discussion and problem recognition.

Disadvantages: serious organizational effort and time commitment is required and discussion is not immediately translated into actions or tasks. End products and recommendations tend to be open ended and non-binding.

Listening Sessions: Announce publicly or invite known interested parties to a venue to discuss specific topics or grievances. Room best set up in conference or round-table format. Open with clear announcement of the topic, scope and intentions for the session. Specify that all parties present are equal status (including agency staff) with an intention to honestly explore issues in a transparent manner. Allow presentations by stakeholder representatives, or alternatively, facilitated free discussion. Give staff approximately equal time to state staff issues and views and then explore similarities, common ground, constraints and sideboards. Try to capture major points of agreement or disagreement in a manner visible to all participants (flip chart or running, projected computer text record). Close with statement and mutual agreement if resolved and unresolved issues and proposed next steps, future meetings, etc.

Advantages: with the right mix of interested people and adequate preparation on the topic, can be extraordinarily productive exploration of issues ad provide the foundation for more detailed on-going interaction.

Disadvantages: require active and insightful facilitation to prevent resentments and anger overwhelming the discussion. Establishes rapport with a selection of stakeholder representatives, who may or may not be the most affected, most influential, and most important in the issue. Possibility of receiving biased information or views.