



### Defining Key Terms

#### Advocacy

The act or process of supporting a cause or proposal : the act or process of advocating something

**Stakeholder** One who is involved in or affected by a course of action.



Source: Merriam-Webster Online Dictionary <http://www.merriam-webster.com/dictionary>.

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### Brainstorm: Who are Stakeholders?



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### Brainstorm: Who are likely stakeholders?

- Public sector agencies or employees
- Minority communities and associations
- Faith-based organizations and faith leaders
- Businesses/chambers of commerce
- Professional associations and trade unions
- Consumer or special-interest organizations (e.g. Open Access or privacy activists)
- Nonprofits
- Private and Public funding agencies
- Regional or neighborhood associations/institutions
- Politicians or political parties

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### Why Identify and Engage Diverse Stakeholders?

Can you think of a time when you engaged a stakeholder outside of the "usual suspects" to help you achieve change?

What did you learn from that experience?

Did it help you toward your change goal?

Why or why not?



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### Why Identify and Engage Diverse Stakeholders?

- To consider those impacted by change and include their voices
- To prioritize most important groups to engage

For Supporters/Allies:

- To help you reach your goal
- To access different assets
- To boost your numbers and impact

For Opponents:

- To understand their motivations, anticipate opposition, and s
- To help you convince/find common ground/minimize their impact

For Neutrals:

- To convert and activate (or ensure they don't become opposed)



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### Group Activity: Change Initiative

- Break into groups of 3-4
- Decide on one initiative to work together on
- Complete worksheet Question 1: **Identify Stakeholders**



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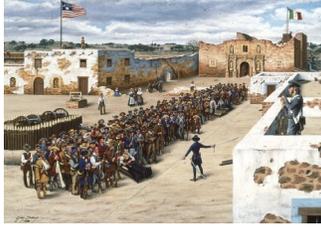
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### Prioritize and Plot Your Stakeholders

*Consider:*

- Their current stance
  - *Actively Support*
  - *Passively Support*
  - *Neutral*
  - *Passively Oppose*
  - *Actively Opposed*
  - *Unknown*




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### Example from *The Community Toolbox*

“A big developer might turn out to support your drive for more low-cost housing, because he recognizes the presence of homeless people in the neighborhood can deter people from buying his expensive houses.

Similarly, people from whom you might expect support might turn out to oppose you. Perhaps a big agency that seems to share your goals is bent out of shape because you seem to be trespassing on their turf or accusing them of ineffectiveness in the past. You can't take anything for granted.”

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### Prioritize and Plot Your Stakeholders

*Consider:*

- Their current stance
  - *Actively Support, Passively Support, Neutral, Passively Oppose, Actively Opposed, Unknown*
- Their relative influence in supporting/blocking
  - *May be based on reach, decision-making power/influence, access to resources, newsworthiness, etc.*



**TIP:** *It is just as important to consider opponents as priority stakeholders. Also, your priority stakeholders may change with time!*

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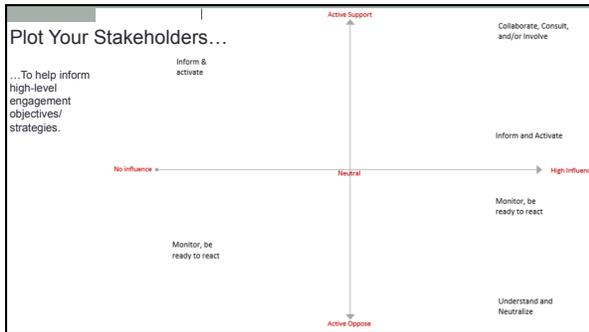
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### Small Group Practice

**Worksheet Steps 2 & 3**

- Write down anticipated stakeholder positions.
- Note stakeholders':
  - Relative Influence
  - Relative Priority for engagement
- Plot priority stakeholders on **matrix on Page 3**.



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### Engagement Strategies is an Art

- Do your research
- Take into account connections between change and stakeholders
- No "right" number: depends on resources
- Prioritization *may* change over time
  - Progress
  - Environment shifted



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**Understand Your Stakeholders**

- How might they benefit if you succeed?
- What may they lose (or *perceive* they may lose)?
- Managing perceptions, whether accurate or inaccurate, is critical.
- How well-informed are they (or *perceive* themselves to be?)
- Do they share your end goal but see different paths/approaches to it?

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**Important!!!**

- Think through and research motivations
- Even for allies (or seeming allies)
  - Are they interested enough to help you?*
  - If they're already working toward this change, would they gain from partnering?*
  - Are there benefits or complications to engaging with them?*



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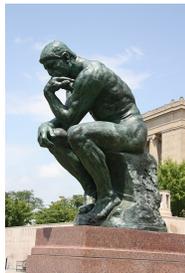
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### Do the Same for Opponents...

- Anticipate how they may benefit
  - Opposition may be a real or perceived "loss"
- Understand how informed they are
- Explore if opponents agree with some parts of your plan but not others
- Know the points of disagreement



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### Activity: Understanding Stakeholders

- Divide into same groups
- Use same goal as before
- Each pick a priority stakeholder
- Group should tackle at least one ally and one opponent



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### Understanding Stakeholders

- Work with a cross-functional team to gather information
- When you are done, ask yourself:
  - Where are the gaps?
  - Is there information based on assumptions/ biases that we should validate?
  - What additional information do we need to ensure an accurate picture?



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**Pull it All Together: Planning Your Approach**

- Different approaches for different objectives/stakeholders
- Maximize benefits & minimize risks for each
- Lead with benefits to them and shared stakeholders/ audiences
- Go into conversations prepared
  - Keep an open mind and be ready to shift approaches as needed.

*"In advocacy situations, there are likely to be well-prepared opponents waiting in the tall grass. And they will need to be out-planned."* Prue Breitrose, The Community Tool Box

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**Tactics May Vary**

- Is there a task force people can join?
- Are you giving quarterly briefings?
- Are you sending out action alerts?
- Do you have a Facebook group?
- Are you holding focus groups?




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### Planning Your Approach: When to Involve Opponents

**Yes:**

- Lines of communication relatively open
- Potential common ground
- Cost not too great

**Perhaps not:**

- Positions strongly held and completely opposed
- High costs/risks to engaging

**Definitely not:**

- History of distrust or deception
- Opponents unwilling to talk




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### Planning Your Approach: Tactics for Opponents

*Can you think of a time when you engaged an opponent in your change efforts? What was your objective in engaging them?*

*What tactics did you use?*

*What worked well?*

*What would you do differently next time?*

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### Tactics for Engaging Opponents

- Meet with them to find common ground or clarify misunderstandings
- Start with an “exploration-only” meeting
- Ask a lot of questions to ensure you understand their motivations
- Develop win-win solutions
- Re-frame the issue
- Have a clear agenda and set ground rules
- Use a mediator or neutral third-party
- Compromise or negotiate (when appropriate)

Source: Involve Opponents and Allies. The Community Tool Box, University of Kansas. [http://cttb.ku.edu/en/table-of-contents/advocacy/advocacy\\_principles/involve\\_opponents\\_and\\_allies](http://cttb.ku.edu/en/table-of-contents/advocacy/advocacy_principles/involve_opponents_and_allies)

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### Your Ultimate Goal is to...

- Be as prepared as possible
- Keep an open mind
- Prepare to shift approaches

*REMEMBER: Motivations, like the stakeholders who hold them, are often complex and multidimensional.*




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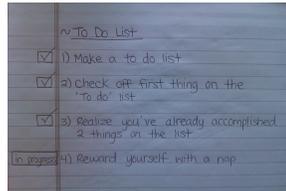
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### Review: Steps for Engaging Stakeholders

- ✓ Identify stakeholders
- ✓ Prioritize and plot stakeholders
- ✓ Understand stakeholders (allies and opponents)
- ✓ Plan your approach with allies and opponents




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### Reflection: Actions & Takeaways

- What is one action that you will take in the next 14 days to engage diverse stakeholders for change?
- What is the most important takeaway you are leaving with?
- Who will you share today's learnings with?




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