## Stakeholder Engagement Strategy

## Checklist

[Devised from experiences of early career researchers and ‘take home messages’ from stakeholder engagement workshops 2015-2017 by the [ARCC network](http://www.arcc-network.org.uk/enhancing-impact/ecrs/)]

Each of the following are aspects of stakeholder engagement researchers have reported require time to be factored in for in a stakeholder engagement strategy. With limited resources and the research to deliver, you might have to prioritise the time you have available for these activities. The checklist below acts as an initial prompt to make you think about how long you think these activities will take and then to prioritise them. It can also serve as a useful record for how much time you anticipated a task taking and how much time it actually took.

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|  | **Priority** | **Time** |
| **Stakeholder mapping & identification** |  |  |
| **Early on, identify possible stakeholders by conducting a stakeholder mapping exercise**  Use existing, programmed relevant industry or sector focused events to identify potential stakeholders – conferences, seminars, blogs. Create your first map -use the 9Cs method. Once initial mapping is done, then work out which groups you want to influence, which you want to get input from etc. Identify who the critical stakeholders are. |  |  |
| **Scope your stakeholders** - spend time gaining an understanding of what interests the stakeholders and what interest they have in collaborating with researchers. Get a feel for the motivation of participants – distilling what is useful and current?  *[you can do this via a desktop review of social media to see what stakeholders are posting and discussing – good for getting a rapid current understanding, and if possible compliment by attending sector relevant webinars and conferences]* *Ask yourself are you staying in your comfort zone or identifying the comfort zone of your stakeholders and working within that comfort zone?* |  |  |
| **Reflect on your strategy**, are these the right people? Before each research stage ends you should be reviewing and questioning ‘are they still the right people?’ |  |  |
| **Making contact** |  |  |
| Use other people’s (established) contacts – ask PIs/Co-Is, peers, networks |  |  |
| Contact experts in the field of research [question how you know who the experts are?] |  |  |
| Make use of the contacts your university has -many will have Knowledge Transfer Centres, leads, possibly dedicated impact and knowledge exchange support you can access. |  |  |
| Perspective of the funding institution – advice from your Research Council -you could contact the portfolio manager |  |  |
| **Engagement methods** |  |  |
| **Scope existing information routes and flows**. Research and discuss with others familiar with the sectors you are working with, how stakeholders gain their information. Are you giving information in a manner that is useful to them? Ask what the stakeholders found most useful of the material used -allow time for this information assimilation. |  |  |
| **Identify most appropriate mechanisms of engagement**. How will you achieve your ‘in’? if you are reliant on other people, factor in time for explaining your research to them, why you need the introduction and chasing them if needed for it. |  |  |
| **Retain engagement** - think how best to keep the stakeholders engaged with the project – is a website enough? People like to engage and be engaged with in different ways – is a newsletter useful/not; workshops/meetings/webinars – time consuming and expensive but face to face contact is important; occasional skype catch ups? Other routes? |  |  |
| **Tap into the activities of others** – can you make use of existing industry activities and tap into them – efficient for you, efficient for your stakeholders! Don’t think you have to make all the contacts yourself, use existing mechanisms (e.g. NERC [Valuing Nature Programme](http://valuing-nature.net/about), [Knowledge Transfer Network](https://ktn-uk.co.uk/)) as conduits into these established groups |  |  |
| **Resource planning** |  |  |
| **Engagement plan** -consider timeframe for when to be engaging and the degree of engagement required with the stakeholder – draw on stakeholder mapping exercise |  |  |
| **Time and resource planning**  -at all stages, think of resource/cost implications. Check availability of stakeholders to participate. Some may require a formal internal sign-off process for their involvement in your activities Think about the time required for planning, administering and running dedicated engagement events and the resources required -you might need to apply for additional funds to cover the costs so factor time in for this. Even creating a newsletter can have substantial resource requirements -you need to set up a template, then there is the content aggregation, the time taken for simplifying messaging and for testing and proof-reading before issuing. |  |  |
| **Building good relationships with stakeholders** |  |  |
| **Formalise collaborations**  -establish and record common expectations |  |  |
| **Persevere and re-engage**  -some organisations/individuals might say no at the start, but as you have findings, they might be more willing to engage and/or personal might change and levels of interest might vary.. Don’t give up. When you think there is something useful, get back in contact |  |  |
| **Nurture and sustain**  - Follow up after meetings, sustain the relationship, don’t just contact when you want something. |  |  |
| **Review what’s working, what’s not** |  |  |
| **Revisit and update engagement plan, record lessons learned**  -think through why you have decided on the activities you’ve carried out, how did they work? Be critically reflective and make use of learning for evolving your stakeholder engagement strategy |  |  |