This stakeholder assessment activity will help you (and your group) define the situation you will focus on for a meeting/workshop and identify the right stakeholders to participate in the Collaborative Learning process. This activity is normally conducted by the planning team designing the Collaborative Learning event. It begins with individual reflection, followed by a facilitated small group discussion, and group completion of a role assessment table.

Resilience Dialogues Stakeholder Assessment Worksheet: Finding the Right People for Your Process

## Stakeholder Role Assessment Step 1: Individual Reflection

The activity begins with your individual reflection on the three questions below. Your group will use the answers you provide to these questions to complete the role assessment table on the next two pages, so be prepared to share your thoughts!

**The situation that I would like to improve is….**

**Who do you consider to be the essential decision makers in this situation?**

**What do you know about each decision maker’s values (what they care about), concerns, and fears (aspects that might be barriers to improving the situation)? If you have conducted stakeholder needs assessment interviews, use those responses to answer this question. If your project is in an early phase of development use this to collect ideas and assumptions about potential stakeholders.**

## Stakeholder Role Assessment Step 2: Defining the Roles in a Collaborative Process

After the individual reflection in Step 1, a facilitator can guide your group in comparing and discussing individual descriptions of the situation and reflections on potential participants. During the discussion, use the role descriptions below to think about each potential participant’s role(s) in a collaborative process. After completing the table on the next page, return to this checklist to see if your group has included representatives for each category in the list of potential participants.

* **Participant:** Has an interest but no strong position. A participant wants to be involved but is not a primary voice for a particular point of view or outcome.
* **Advocate:** Holds a strong position on one or more of the major issues, generally a primary stakeholder who is prepared to support a specific policy decision.
* **Representative:** Participates for or advocates on behalf of a group or organization, may or may not have decision authority.
* **Decision maker:** Has authority to make and implement a decision. Establishes decision parameters and decision space (how much of the decision authority can be shared).
* **Information provider**: Provides data or information pertaining to issues in the situation, may be a technical expert or source of local knowledge.
* **Initiator:** Identifies the need for a Collaborative Learning process, may then become the convener or sponsor.
* **Convener:** Brings parties together and provides a venue, may also participate in process design.Internal organizational support for the Collaborative Learning process is critical.
* **Sponsor:** Provides public support for the Collaborative Learning process or may provide resources. Internal organizational support for the Collaborative Learning process is critical.
* **Designer:** Develops the Collaborative Learning event or series of events to accomplish group goals, may be a planning team or steering committee.
* **Facilitator:** Guides the process in an impartial manner, may be internal member of a convening organization or an external consultant.
* **Evaluator:** Analyzes input collected during the Collaborative Learning event, may be a planning team or steering committee member or an external consultant.

## Role Assessment Step 3: Group Completion of a Role Assessment Table

With support from your facilitator, your group will combine individual reflections to complete this table on a flip chart.

Situation to be improved: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team members: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Potential participant in collaborative process** | **What is important to them (related to your team’s situation)?** | **Role they would play in a collaborative process?** |
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**I can see myself in the role(s) of** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Complete resources for the Resilience Dialogues Project of the National Estuarine Research Reserve System are available from <https://www.wellsreserve.org/project/the-resilience-dialogue>