

# Stakeholder Engagement Toolkit



## Purpose

Identify and engage effectively with those who have a vested interest in or impact on an initiative

## Who this is for

- Project Leads
- Team Members (use for orientation and communication)

## When to use

Planning and scoping the initiative

Throughout implementation / at key milestones

Closing the initiative

Introduction

Identification Guide

Stakeholder Assessment

Communication Plan

## Stakeholder Assessment Tool

### Why is this tool important?

The assessment tool is a supplement to stakeholder identification – going the next step to reflect on the particular needs of key stakeholders. This level of consideration grows in importance with a stakeholder's impact on the initiative.

Guiding Questions

**1 Stakeholder needs & motivations**

**General/Functional**

This is related to their department or role. For example, closing equity gaps.

**Individual**

This is related to their specific needs/position. For example, a physics professor with a pet project.

**2 Describe the impact of the change of the initiative on the individual stakeholder.**

Understanding the impact on individual stakeholders is critical for implementing sustainable change. Organizational change happens on the individual level. If individuals don't adopt the change, then initiatives and change won't be effective.

Consider life before and after the change for each stakeholder in the following ways:

- Process
- Behaviors
- Job function & description
- Systems
- Mindset
- Performance evaluation
- Tools
- Org chart
- Compensation

Template

[Download spreadsheet template](#) ↓

**Project Title**

**1 Stakeholder needs & motivations**

Stakeholder name	Why are they a stakeholder in this project?	Why do they <i>think</i> they are a stakeholder in this project?	General/Functional needs & motivations	Individual needs & motivations

**2 Stakeholder interest & impact**

Stakeholder name	Rate impact on initiative	Rate impact on stakeholder	Describe your rating choice	Level of interest	Disposition toward initiative	Active or passive?
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	- Low +	- Low +		- Low +	- Negative +	Select ^
	- Mid +	- Mid +		- Mid +	- Neutral +	Active
	- High +	- High +		- Mid +	- Positive +	Passive
	- Mid +	- Mid +		- Mid +	- Neutral +	Select v
	- Mid +	- Mid +		- Mid +	- Neutral +	Select v

**Tip** The contents of this table can be used to directly inform the [Stakeholder Communication Plan](#).