WILDTEAM®

STAKEHOLDER ENGAGEMENT FOR WILDLIFE CONSERVATION

V1

Acknowledgements

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Contents

INTRODUCTION

Purpose

In a conservation situation, stakeholders are any individual or group that may affect, or be affected by the conservation work. Stakeholders will be different for each situation [1,2]. Some example stakeholders of conservation work are listed in Box 1 [3]. Engaging stakeholders is the process by which conservationists involve stakeholders in the conservation work [4,1].

In some cases, it will be necessary to engage with stakeholders to ensure that they have a meaningful say in any conservation work that may lead to substantial changes in their lives [5]. For example, local fishers should be engaged with if the conservation work will affect their livelihoods by restricting their access to traditional fishing grounds.

Box 1. Example stakeholders.

- Academic institutions
- Businesses
- Community groups
- Community leaders
- Consumers
- Non-governmental organisation (NGO)
- Donors
- Educational groups
- Government departments
- Independent experts
- Media
- Policy makers
- Political groups
- Religious leaders
- Tourists

[1]

To help achieve and sustain conservation impact (Box 2), engaging stakeholders is also often needed to:

- Improve the information base upon which the conservation strategy is created [5,6],
- Access resources such as funds [5] and skilled staff.
- Acquire consent for, and/or active participation in the conservation work [2,7].

Engaging stakeholders, however, may require substantial time and resources [8,9]. For example, engaging multiple stakeholders over 3 years of conservation work may involve paying for and organising many engagement events. Engaging stakeholders may also risk harming those directly and indirectly involved [11]. For example, engaging certain stakeholders may unintentionally increase the influence of large, politically powerful groups and further reduce the influence of smaller, marginalised groups [5,12]. The purpose of this Stakeholder Engagement for Wildlife Conservation best practice, therefore, is to help conservationists carry out the stakeholder engagement process as effectively and ethically as possible.

Box 2. Impact.

Impact is the desired change caused by the conservation work. Impact is measured in changes to:

- **Biodiversity targets:** the species or habitats that the project is helping to conserve, e.g., jaguars.
- **Threats:** What is directly degrading the biodiversity targets, e.g., jaguar poaching.
- **Behaviours:** What people are doing to drive the threats e.g., people living in towns buying jaguar skins.
- **Influences:** What is encouraging or discouraging people to carry out behaviours, e.g., family members complimenting household owners on their jaguar skin rugs.

[1]

Application

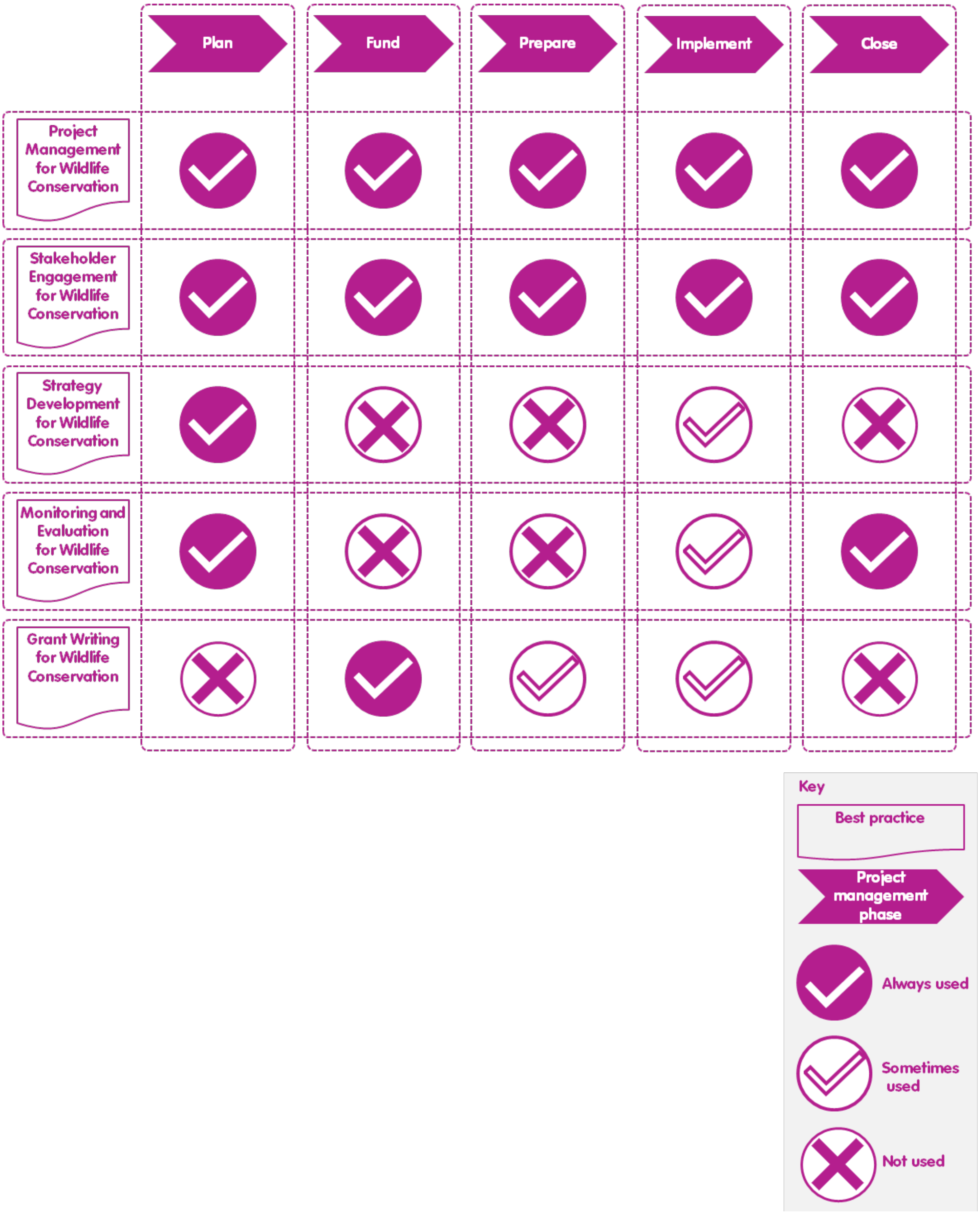
This best practice can be used as a step-by-step guide to engaging any number or type of stakeholders, for any kind of conservation work. For example, it could be used to engage stakeholders for a project to manage a community forest, or for a project to lobby governments to reduce the use of fossil fuels.

This best practice can be used as a stand-alone approach, but is most effectively used in combination with the other best practices in the Wildlife Conservation Professional Series (Box 3). In this series, the Project Management for Wildlife Conservation [10] best practice provides the overall framework for carrying out a conservation project from start to finish. The Stakeholder Engagement for Wildlife Conservation best practice can be used, as needed, during any project phase. Other best practices in this series provide guidance on how to carry out key activities during 1 or more of the project management phases [10,14-16] (Figure 1).

Box 3. Wildlife Conservation Professional Series.

This series provides practical guidelines to help conservationists achieve a greater impact. The best practices in this series have been designed to be used together, with shared terms and complementary content. These combined best practices provide a complete set of guidelines for planning, funding, managing, monitoring, and reporting on conservation work. Each best practice comprises of a manual and a set of supporting documents that are free for anyone to use, distribute and adapt to suit their needs.

As well as being used as step-by-step guidelines, all the best practices in this series can also be used as supporting resources for training and facilitation. No matter how they are used, it is important for conservationists to use them intelligently, by deciding for themselves how to adapt and apply the guidance to best suit their needs.


Plan
Fund
Prepare
Implement
Close
Project Management for Wildlife Conservation
Stakeholder Engagement for Wildlife Conservation
Strategy Development for Wildlife Conservation
Monitoring and Evaluation for Wildlife Conservation
Grant Writing for Wildlife Conservation
Key
Best practice
Project management phase
Always used
Sometimes used
Not used

Overview

In line with the other best practices in the Wildlife Conservation Professional series, the terms "project" and "project team" are used throughout to refer to any type or level of conservation work (i.e. project, programme, and organisation).

This best practice begins with a set of overarching principles to guide the project team's overall approach for engaging stakeholders effectively and ethically. This best practice then provides guidance on carrying out each of the following steps in the engaging stakeholders process (Figure 2):

- Selecting stakeholders, to help the project team select the right stakeholders to engage for their project.
- Initiating the relationship, to help the project team assess stakeholder relationships and support for the project, make contact, and organise relationship-building and information-sharing events.
- Clarifying the relationship, to help the project team carry out joint planning, establish roles, and document agreements.
- Managing the relationship, to help the project team nurture relationships, manage progress of joint work, manage change in the relationship, and manage joint reporting.

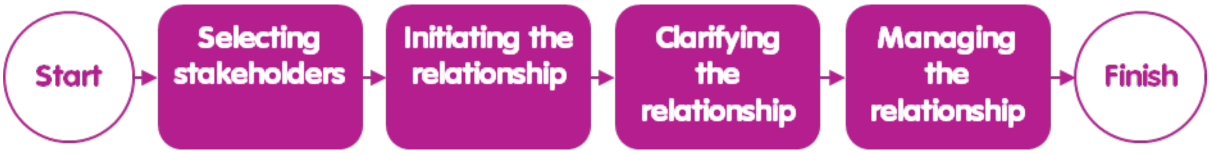


Figure 2. Steps for the stakeholder engagement process.

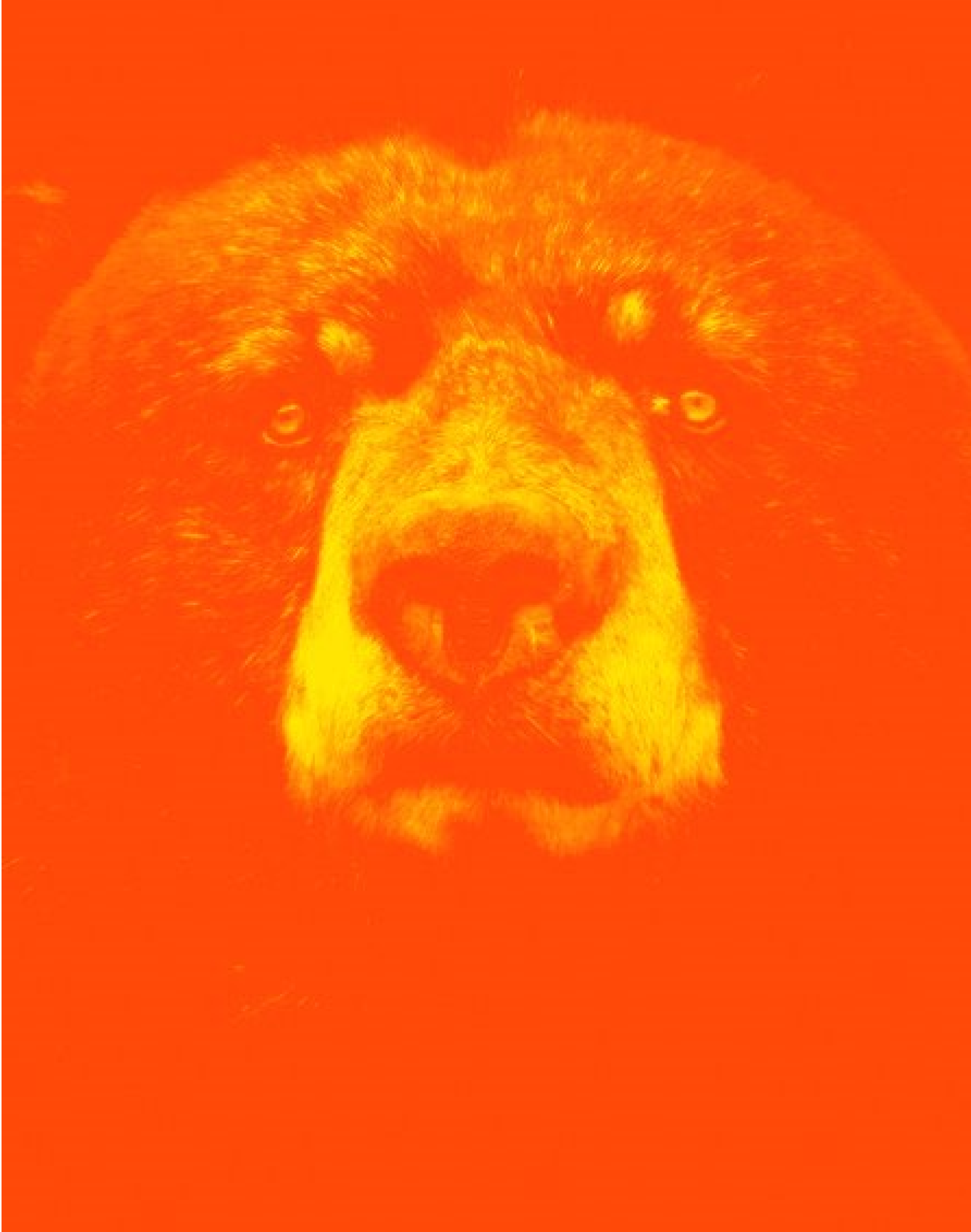
The stakeholder engagement process is sequential, but also iterative, meaning that the project team may need to repeat all or part of an earlier step in response to new information and changing conditions that emerge during a subsequent step or project implementation [12]. For example, even near the end of a project a new stakeholder may be identified that the project team need to consider for potential selection [12].

Supporting resources

A set of supporting resources is provided to help project teams apply this best practice. Links to all documents referred to in this manual, and further resources to help conservationists apply this best practice are listed in Table 1.

Table 1. Supporting resources.

Resource	Description	Link
Example documents	Example project documents in line with the Wildlife Conservation Professional series	Link
Wildlife Conservation Professional Series	Project Management for Wildlife Conservation Stakeholder Engagement for Wildlife Conservation Strategy Development for Wildlife Conservation Monitoring and Evaluation for Wildlife Conservation Grant Writing for Wildlife Conservation	Link
Glossary	Explanation of all terms used in the Wildlife Conservation Professional Series	Link
Training	Online training in all Wildlife Conservation Professional Series subjects	Link
Conservation skills directory	Map of all conservationists certified in a Wildlife Conservation Professional Series skill	Link
WildHub	Global online community of conservationists	Link



PRINCIPLES

Overview

The purpose of the Principles is to provide the project team with a set of fundamental approaches and attitudes to help them carry out their stakeholder engagement activities effectively and ethically. There are 4 principles:

- Start early, to encourage the project team to engage stakeholders well in advance of when their participation is needed.
- Respect differences, to encourage the project team to engage each stakeholder in a way that acknowledges and appreciates their identity.
- Enable involvement, to encourage the project team to create the conditions that will enable all stakeholders to get involved if they wish to do so.
- Concentrate on consensus, to encourage the project team to plan and carry out their project in a way that achieves their desired conservation impact, while also helping to fulfil stakeholder needs.

The project team should follow all principles, but it is up to them to decide how to apply each principle to best suit their project.

Start early

Purpose

A project may fail if the project team start work before they have established good stakeholder relationships and sufficient stakeholder support for the project [13]. However, it may often take many interactions over several years for the project team and stakeholders to develop the trust and understanding that will enable them to work together effectively [8,11]. There may, therefore, be a substantial time lag between when the project team select the stakeholders they will engage with and when they will be able to engage with them effectively [17]. The purpose of the Start early principle, therefore, is to encourage the project team to start the stakeholder engagement process well in advance of when stakeholder participation is needed.

Application

To apply the Start early principle, the project team should start the stakeholder engagement process during the Plan phase of their project, and ideally before they have developed their conservation strategy [8]. Guidance on developing a conservation strategy is provided in the connected Strategy Development for Wildlife Conservation best practice [14].

Before they have developed their conservation strategy, the project team will not be able to identify all stakeholders that they will need to engage with during the project [19,20]. However, they may still have enough of an understanding of the current situation to be able to identify and select some stakeholders whose engagement will be key to the success of any conservation work (see Selecting stakeholders). For example, a project team will know that they need to start engaging local community leaders well before they develop plans to expand a marine protected area. The project team can then use their assessment of the relationships between stakeholders and their level of support for the project to help them decide when and how to initiate contact (see Initiating the relationship), and when to start developing any Joint plans and Joint Agreements (see Clarifying the relationship).

Respect differences

Purpose

Each stakeholder has their own unique identity, made up of their culture, values, ways of making decisions, rights, knowledge, and relationships [13,21,22]. The purpose of the Respect differences principle, therefore, is to encourage the project team to engage each stakeholder in a way that acknowledges and appreciates their identity.

Application

The project team can apply the Respect differences principle by:

- Personalising communications: Irrespective of the circumstance, the project team should always address and refer to a stakeholder in the way they prefer and avoid any terms that the stakeholder would find offensive. For example, indigenous peoples may take offence at being addressed as a stakeholder, because the term has a strong connection to colonial practices and does not recognise their rights and importance relative to other groups [23].
- Using appropriate language: For example, the project team could provide reports on project progress to a government department using the national language of the country in which the project is being carried out [24].
- Linking concepts to stakeholder culture: For example, the project team could ask a local community about how they relate to their local wildlife and wild places, rather than forcing them to identify what ecosystem services they provide [7].
- Choosing established channels for exchanging information: For example, the project team could give an update on project progress and challenges through a local radio station [24].
- Using established decision-making processes: For example, the project team could participate in a village meeting to discuss the project with local community leaders [25].
- Integrating stakeholders into the project team: For example, the project team could employ a local fisher as a liaison officer for other local fishers.

Enable involvement

Purpose

Some stakeholders may wish to, but be unable to, get involved in the project [21]. For example, an environmental youth group may want to be involved in a workshop to develop a Joint plan (see Clarifying the relationship) but be unable to do so because they do not have the funds to attend. The purpose of the Enable involvement principle is to encourage the project team to help create the conditions that enable all stakeholders to get involved if they wish to do so.

Application

The project team can apply the Enable involvement principle by:

- Selecting appropriate venues that will be easy for the stakeholders to reach, and that the stakeholders will be comfortable with [7]. For example, the project team could hold a focus group discussion with local fishers at their village hall.
- Supplying funds to enable stakeholders to get involved who could otherwise not afford to do so [20]. For example, the project team could provide funds to cover food and accommodation for local fisher families to attend a project meeting.
- Arranging independent facilitation of stakeholder engagement events, to ensure that stakeholder views are recorded and valued [20]. For example, the project team could arrange for an experienced, independent facilitator to design and run multi-stakeholder workshops to develop a Joint plan.
- Providing opportunities that will enable stakeholders to get involved in planning, funding, implementation, and monitoring and evaluation activities [20,25]. For example, the project team could train rangers to collect information on fishing by-catch.
- Creating decision-making structures for stakeholders that do not have a clear way of making decisions or representing themselves [26,27]. For example, the project team could work with local fishers to design and create a committee that enables that group to develop and communicate their views.

Concentrate on consensus

Purpose

The project team will have a focus on achieving their desired conservation impact for a specific set of biodiversity targets [14]. Stakeholders, meanwhile, may have an interest in helping to conserve some, all, or none of the biodiversity targets [28]. If the project team try to control stakeholders and force them to help achieve the conservation impact the project team desire, they may unintentionally impede project progress, create conflict between stakeholders, and marginalise vulnerable groups such as indigenous peoples [13]. Likewise, some stakeholders may have totally different objectives that are not connected to conservation [9,29]. If the project team does not help a stakeholder fulfil their own needs, there may be no incentive for that stakeholder to support and get involved in the project [30-31]. The purpose of the Concentrate on consensus principle, therefore, is to encourage the project team to plan and carry out their project in a way that stakeholders feel will support their own needs as well as those of the project team.

Application

The project team can apply the Concentrate on consensus principle by obtaining informed, voluntary consent for any activities that may negatively affect stakeholder well-being [21,22]. For example, the project team should obtain the permission of local fisher families before carrying out any activities that would move them from their ancestral lands. To decide which stakeholders such consent is needed from, the project team should carry out an assessment of the potential effects of the project on each stakeholder (see Selecting stakeholders), and then establish their role with respect to the project (see Clarifying the relationship).

The project team can also apply this principle by planning to generate positive effects that fulfil stakeholder needs [9]. For example, the project team could build a harbour that could be used by both rangers and fishers to keep their boats safe during storms. Building consensus for the conservation strategy can be carried out through joint planning (see Clarifying the relationship).

SELECTING STAKEHOLDERS

Overview

Involving too many or the wrong types of stakeholders, or too few of the right types of stakeholders may delay, obstruct, or degrade both the development of a Joint plan or Joint agreement (see Clarifying the relationship) and its subsequent implementation [13,32]. For example, developing a national manta ray action plan without input from government officials may lead to long delays while the project team tries to persuade the government of the plan's validity.

Similarly, excluding stakeholders that may be affected by the project will prevent them from having a say about changes that could affect their lives in important ways [33]. For example, if local fishers are not included, they will not be able to show how planned work will affect their livelihoods, potentially resulting in a reduction in their income and a loss of respect from other community members.

To select stakeholders for their project, the project team will need to identify the different stakeholders, assess the effect of the project on those stakeholders, and assess the project's need for those stakeholders. The activities for this step are shown in Figure 3 and described in detail below.

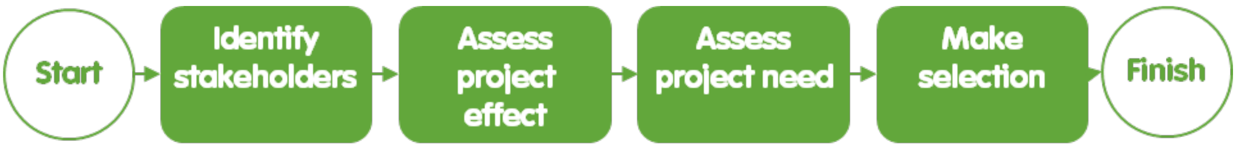


Figure 3. Selecting stakeholder activities.

It is important to note that the project team should repeat this step as often as needed to help select additional stakeholders in response to new information or changing conditions. For example, through arranging information-sharing events (see Initiating the relationship), the project team may identify a new stakeholder that they had not previously been aware of [12].

The project team can use a range of sources to gather information on and assess stakeholders in this and subsequent steps of the stakeholder engagement process (Box 4).

Box 4. Example sources of information on stakeholders.

- Expert opinions
- Project team members
- Verified studies
- Unverified studies
- Government databases
- Other stakeholders
- Stakeholder websites
- Social media pages
- Media articles
- Observations of stakeholder interactions
- Stakeholder communications
- Networks

Identify stakeholders

To identify stakeholders, the project team should first list all groups or individuals that are involved in some way in the situation the project is aiming to change. This could include those that may be affected by the project, and those that could affect the project [2,7]. The project team should pay particular attention to identifying any stakeholders that are not recognised by the government and/or have little influence in society [21]. This is to ensure that these otherwise marginalised stakeholders also have the potential to influence and get involved in the project.

When identifying stakeholders, it is important that the project team are very specific in how they define them, as this will be helpful when it comes to initiating, clarifying, and managing relationships with each stakeholder during the project [9]. For example, "the government" may not be a specific enough description of a stakeholder, because the term encompasses a wide range of departments that may be affected or needed differently by the project. To ensure appropriate representation and inclusivity (see Respect differences), the project team should, where appropriate, split stakeholder groups into smaller groups based on a relevant, shared characteristic e.g. practice, authority, gender, age, race, religion, politics, education, wealth, or physical ability (Figure 4).

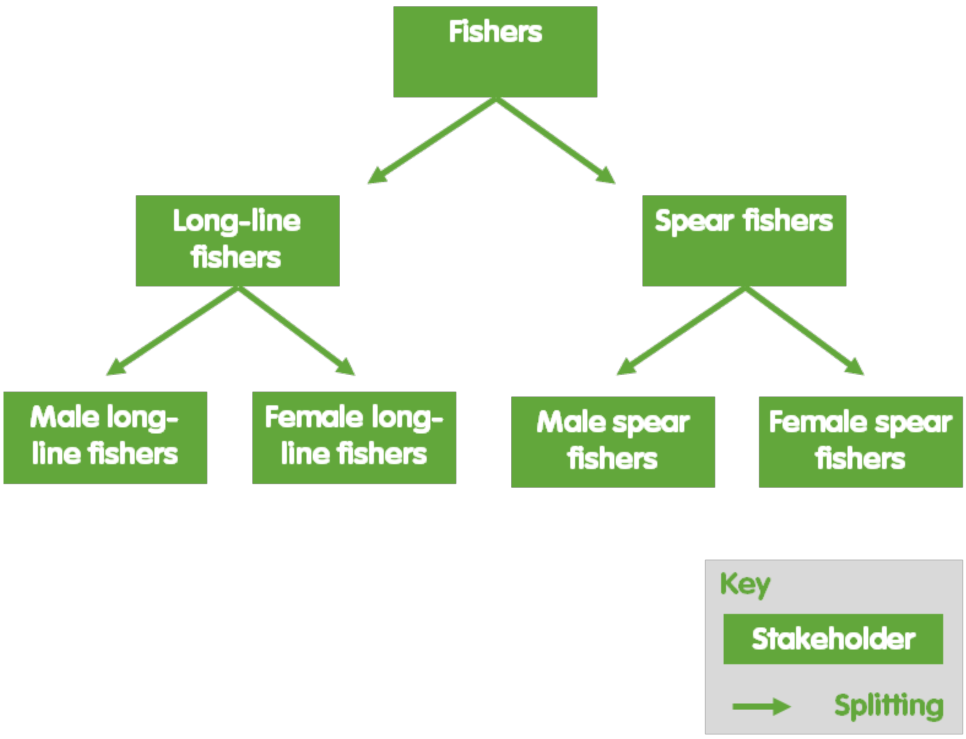


Figure 4. Example splitting and grouping of stakeholders.

The project team can list all identified stakeholders in the Stakeholder engagement worksheet (see Supporting resources), together with their type, and a description of how each is currently involved in the situation of interest. A stakeholder list for an example shark conservation project is provided in Table 2.

Table 2. Example stakeholder list.

Stakeholder	Type	Description of involvement
Beyond the Blue	NGO	Provides safety equipment to local fishers
Boyra State University	Academic institution	Carries out research on sharks in Pakula Marine Reserve
Climate Change Champions	NGO	Works to mitigate effects of climate change on local communities living around Pakula Marine Reserve
Congress	Government	Decides on changes to laws and regulations
Department of Wildlife Conservation	Government	Manages and regulates activities in Pakula Marine Reserve
Fish Finders	Business	Trades shark and other marine life to Ethiopia, Gabon, and Spain
Joining the Dots	Consultancy	Provides expert advice on how to strengthen multi-stakeholder management of protected areas
Local community leaders	Community group	Mayors and councillors of local towns and villages bordering Pakula Marine Reserve
Local shark fishers	Community group	Local men and women who catch sharks as main source of income
Local shark fishers' families	Community group	Partners, children, and dependent extended family members of local men and women catching sharks as main source of income
Local sports fishing tour operators	Business	Multiple local operators that take international tourists on sports fishing trips
Mombasa Aquarium	Donor	Local business that has donated £8,000 to purchase equipment to support conservation work that helps to protect Kenyan sea life
National Institute of Conservation Science	Academic institution	Carries out research on sharks at multiple sites across the world
Padstow college	Academic institution	Carries out research on trade in sharks
Samaki	NGO	National NGO that carries out awareness campaigns to encourage sustainable fishing practices
Sauces and Scales	Business	Local restaurant chain that sells 30% of shark products collected from Pakula Marine Reserve
Saving Africa's Seas Foundation	Donor	Germany-based foundation that provides funds of up to £150,000/year for projects that help protect sea life in African waters
SeaScape	Consultancy	Provides objective assessment of sustainability of trade from collection to consumption

Stakeholder	Type	Description of involvement
Shark Protection Society	Network	International network of scientists and NGO staff working to promote the protection of sharks on a global scale
Sports fishers	Other	International tourists who take part in sports fishing trips

Assess project effect

The project team can now use the Stakeholder engagement worksheet to describe how each listed stakeholder may be positively or negatively affected by the project. Some stakeholders may be both positively and negatively affected by the project. Example descriptions of positive and negative effects are provided in Table 3.

The project team can then use these descriptions to assign scores (very high, high, medium, low, or very low) for the potential positive and negative effects on each stakeholder. The Stakeholder engagement worksheet will then use these scores to automatically calculate an overall project effect rating (very high, high, medium, low, or very low) for each stakeholder (Figure 5).

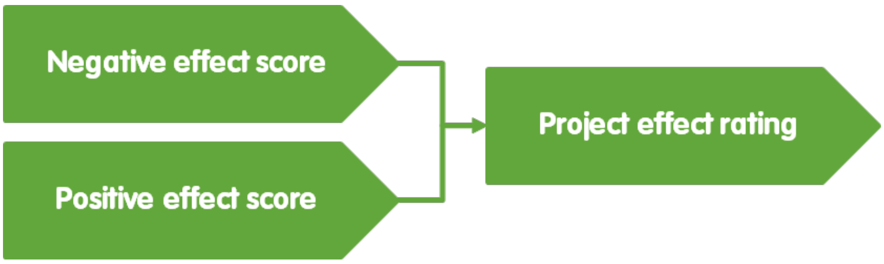


Figure 5. Calculation of project effect rating.

Example inputs and results of the effect ratings calculation is provided in Table 3. The project team may have to re-assess some of the project effect ratings once they have gained a better understanding of the stakeholder's perspectives through information-sharing events (see Initiating the relationship) and/or joint planning workshops (see Clarifying the relationship).

Table 3. Example description of effects and calculation of effect ratings.

	Negative effect		Positive effect		Effect rating
Stakeholder	Description	Score	Description	Score	
Beyond the Blue	None	None	May be able to access funds and increase network	Very low	Very low
Boyra State University	None	None	May have their research findings used to improve management of sharks	Very low	Very low
Climate Change Champions	None	None	May be able to access funds and increase network	Low	Low
Congress	None	None	May increase in international reputation for protecting the environment	Low	Low
Department of Wildlife Conservation	May lose reputation if project goes wrong	Low	May gain patrolling boats and reduce illegal shark fishing	Medium	Medium
Fish Finders	May have reduced income from having less shark products to sell	Medium	None	None	Medium
Joining the Dots	None	None	May be able to access funds and increase network	Low	Low
Local community leaders	May lose political support from fishers and fisher families	Medium	None	None	Medium
Local shark fishers	May have reduced income from having less shark products to sell	Very high	None	None	Very high
Local shark fishers' families	May have reduced social standing due to loss of jobs and income related to shark fishing	High	None	None	High
Local sports fishing tour operators	May have reduced income from no	High	None	None	High

Stakeholder	Negative effect		Positive effect		Effect rating
	Description	Score	Description	Score	
	access to prime shark fishing areas				
Mombasa Aquarium	None	None	May be able to fulfil vision of helping to protect Kenyan sea life	High	High
National Institute of Conservation Science	None	None	May be able to increase international database of shark population numbers	Low	Low
Padstow college	None	None	May have their research findings used to improve management of sharks	Very low	Very low
Samaki	None	None	May be able to access funds and increase network	Medium	Medium
Sauces and Scales	May have reduced income from having less shark products to sell	Very low	None	None	Very low
Saving Africa's Seas Foundation	None	None	May be able to fulfil vision of helping protect sea life in African waters	Medium	Medium
SeaScape	None	None	May be able to access funds and increase network	Medium	Medium
Shark Protection Society	None	None	May be able to increase understanding of how to better protect sharks	Medium	Medium
Sports fishers	May catch less sharks due to reduced access to prime shark fishing areas	Low	None	None	Low

Assess project need

Using the Stakeholder engagement worksheet, the project team should now describe how each identified stakeholder is needed for:

- Information to help understand and create solutions to the current situation.
- Consent by stakeholders that have the power to provide official or unofficial permission for the project to go ahead.
- Participation by stakeholders needed to directly help implement the project and sustain its impact.
- Resources from stakeholders who can provide the project team with resources such as funds, infrastructure, skills, and equipment.

The same stakeholder may be needed for different reasons and at different times during the project [4]. Example descriptions of project need are provided in Table 4.

Using the Stakeholder engagement worksheet, the project team can then use these descriptions to assign scores (very high, high, medium, low, or very low) for the need of each stakeholder. The Stakeholder engagement worksheet will then use those scores to automatically calculate an overall project need rating for each stakeholder (Figure 6). Examples of need scores and ratings are provided in Table 4.

The project team may have to re-assess some of the project need ratings once they have gained a better understanding of the stakeholder's perspectives through information-sharing events (see Initiating the relationship) and/or joint planning workshops (see Clarifying the relationship).

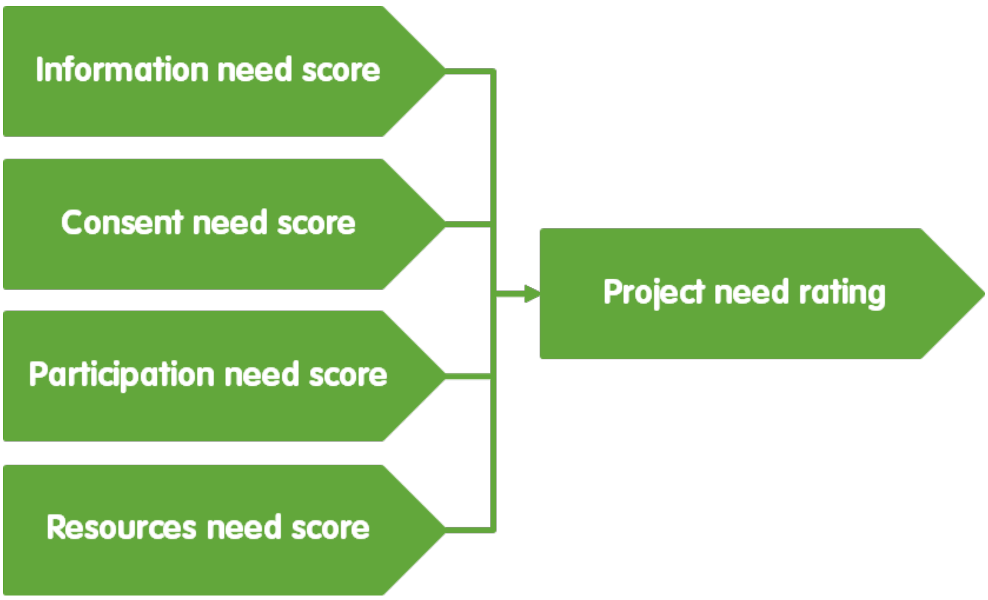


Figure 6. Calculation of project need rating.

Table 4. Example project need scores and ratings.

Stakeholder	Information		Consent		Participation		Resources		Need rating
	Description	Score	Description	Score	Description	Score	Description	Score	
Beyond the Blue	No need	None	No need	None	No need	None	Needed for supplying safety equipment for fishers	Low	Low
Boyra State University	Needed for information on status of current shark population	Medium	No need	None	No need	None	No need	None	Medium
Climate Change Champions	No need	None	Needed for consent as have a strong relation with Congress	Medium	No need	None	No need	None	Medium
Congress	No need	None	No need	Very low	No need	None	No need	None	Very low
Department of Wildlife Conservation	Needed for information on seizures and arrests	Medium	Needed for government permission to carry out project	Very high	Needed for participation of Government Sea rangers	Very high	Needed for use of marine guard posts as training venues	Nice to have	Very high
Fish Finders	Needed to understand trade in shark	Medium	Needed for consent to help reduce the demand for	Medium	No need	None	No need	Not needed	Medium

Stakeholder	Information		Consent		Participation		Resources		Need rating
	Description	Score	Description	Score	Description	Score	Description	Score	
			illegally caught shark						
Joining the Dots	Needed for information on how to create co-management structure for Pakula Marine Reserve	High	No need	None	No need	None	No need	None	High
Local community leaders	No need	None	Needed for consent to changes to shark fishing practices by local fishers	Medium	Needed for actively encouraging fishers to apply safe shark fishing protocol	Medium	No need	None	Medium
Local shark fishers	Needed to understand what influences them to fish for sharks	Very high	Needed for their consent about potential changes to their lifestyle and shark fishing practices	Very high	Needed for applying safe shark fishing protocol	Very high	No need	None	Very high
Local shark fishers' families	No need	None	Needed for their consent about potential changes	Very high	No need	None	No need	None	Very high

Stakeholder	Information		Consent		Participation		Resources		Need rating
	Description	Score	Description	Score	Description	Score	Description	Score	
			to their lifestyle and social standing						
Local sports fishing tour operators	Needed to understand sports fishing industry	Low	Needed for consent of change to their income/business plan	Medium	No need	None	No need	None	Medium
Mombasa Aquarium	No need	None	No need	None	No need	None	Needed to supply funds to project	High	High
National Institute of Conservation Science	Needed for information on standardised indicators for measuring shark populations	Low	No need	None	No need	None	No need	None	Low
Padstow college	Needed for information on the influences and behaviours driving declines in shark numbers	Very low	No need	None	No need	None	No need	None	Very low

Stakeholder	Information		Consent		Participation		Resources		Need rating
	Description	Score	Description	Score	Description	Score	Description	Score	
Samaki	No need	None	No need	None	Needed to help deliver awareness raising work	High	Needed to provide staff, vehicles, and office for awareness raising work	High	High
Sauces and Scales	Needed to understand trade in shark	Low	Need their consent to help reduce the demand for illegally caught shark	Low	No need	None	No need	None	Low
Saving Africa's Seas Foundation	Unknown	None	No need	None	No need	None	Needed to supply funds to project	Very high	Very high
SeaScape	Needed for information on how to make alternative livelihood work sustainable for fishers over the long-term	Very high	No need	None	No need	None	No need	None	Very high
Shark Protection Society	Needed for information and advice on shark monitoring	Very low	No need	None	No need	None	No need	None	Very low

Stakeholder	Information		Consent		Participation		Resources		Need rating
	Description	Score	Description	Score	Description	Score	Description	Score	
Sports fishers	Needed to understand sports fishing industry	Low	No need	None	No need	None	No need	None	Low

Select stakeholders

The final activity in the Selecting stakeholders step is for the project team to use the project effect and project need ratings to help them select which stakeholders to engage. For example, the project team could decide to engage with all stakeholders that have:

- At least a high effect rating.
- At least a high need rating.
- At least a medium effect rating and a medium need rating.

An example selection of stakeholders is shown in Figure 7.

Project effect rating	Very low	Low	Medium	High	Very high
Very high					Local shark fishers
High			Local sports fishing tour operators	Mombasa Aquarium	Local shark fishers' families
Medium	Shark Protection Society	Climate Change Champions	Fish Finders Local community leaders	Samaki	Department of Wildlife Conservation SeaScape Saving Africa's Seas Foundation
Low	Congress	National Institute of Conservation Science Sports fishers		Joining the Dots	
Very low	Padstow college	Sauces and Scales Beyond the Blue	Boyra State University		

Project need rating

Key
Selected
Not selected

Figure 7. Example selection of stakeholders based on project effect and project need ratings.

INITIATING THE RELATIONSHIP

Overview

Now that the project team have selected which stakeholders to engage with, the next step is to initiate a relationship with each of them. The first activity in the Initiating the relationship step is for the project team to assess stakeholder relationships. This information can then be used to arrange appropriate relationship-building and information-sharing events. Through these events, the project team can then assess stakeholder support for the project. Once they consider that sufficient support has been achieved, the project team can clarify the relationship with the stakeholder (see Clarifying the relationship). The Initiating the relationship activities are shown in Figure 8 and described below.

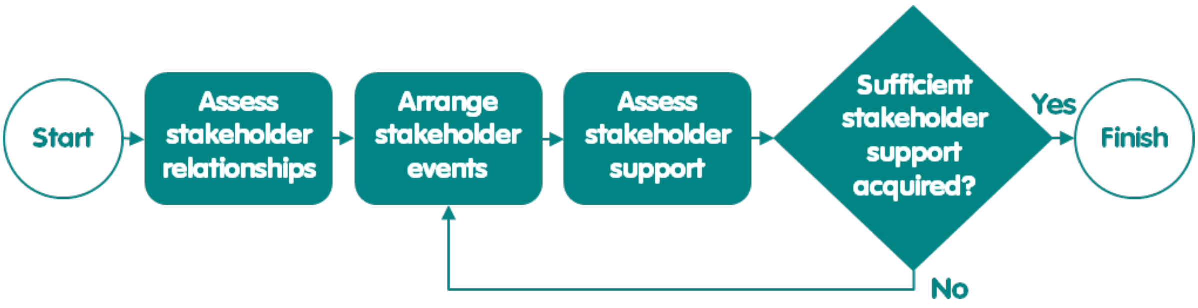


Figure 8. Initiating the relationship activities.

Box 5. Project plan.

The Project plan is the blueprint for the project, containing all the major information the project team need to carry out and assess the project [1].

In some cases, the project team will need to adapt the activities in this step based on their relationships with each stakeholder. For example, the project team may not need to arrange any relationship building events for stakeholders that they already have a working relationship with.

Assess relationships

The degree to which each stakeholder becomes involved in and supports the project may be influenced by their relationships with the other stakeholders involved. For example, a government department may be hesitant to get involved with the project because they have a bad relationship with a local NGO who are already involved. The project team, therefore, need to assess the relationships between each stakeholder so that they can arrange engagement events that help improve these relationships were necessary. To assess stakeholder relationships, the project team should describe and rate (very bad, bad, neutral, good, very good) the state of each relationship [12]. The project team should likewise assess their relationship with each stakeholder. Example descriptions and ratings of stakeholder relationships is shown in Table 5. Additional examples of descriptions and ratings of stakeholder relationships are provided in the example project documents (see Supporting resources).

Table 5. Example description and rating of stakeholder relationships.

	Beyond the Blue		Congress		Department of Wildlife Conservation		Fish finders	
Stakeholder	Description	Relationship rating	Description	Relationship rating	Description	Relationship rating	Description	Relationship rating
Project team	Project team and Beyond the Blue think of each other as competitors for conservation work and funds	Bad	No current relationship	Neutral	The Project manager has a good working relationship with the head of the department	Good	Clash of values means that interactions are generally tense	Very bad
Beyond the Blue			No current relationship	Neutral	Aware of each other but have not had any meaningful interactions	Neutral	Fish Finders appreciate that Beyond the Blue help keep fishers safe	Good
Congress					Congress do not prioritise the Department of Wildlife Conservation work, so tend to maintain or reduce funding for them each year	Bad	Fish Finders seen by Congress as leading company that helps economy	Very good

	Beyond the Blue		Congress		Department of Wildlife Conservation		Fish finders	
Stakeholder	Description	Relationship rating	Description	Relationship rating	Description	Relationship rating	Description	Relationship rating
Department of Wildlife Conservation							Sometimes clash because Department of Wildlife think that Fish Finders sometimes trade in fish caught illegally in protected areas	Bad

Arrange stakeholder events

To build stakeholder support, the project team should now contact each selected stakeholder to arrange:

- Information-sharing events: To build a shared understanding of the situation and each other's experience, vision, capacity, and motivation [4, 30].
- Relationship-building events: To build mutual trust [11].

The project team can consider arranging information-sharing and relationship-building events for individual or multiple stakeholders. Which stakeholders to include in each event will depend on the relationships between the different stakeholders, and between the various stakeholders and the project team. For example, the project team could consider holding:

- Multi-stakeholder events for stakeholders that have at least a neutral, good, or very good relationship rating with the other attendees.
- Individual stakeholder events for stakeholders that have bad or very bad relationship ratings with other stakeholders.

The project team can also consider combining information-sharing and relationship-building events when useful, practical, and appropriate. Some examples of information-sharing and relationship-building events are provided in Box 5.

Box 5. Example events.

Information-sharing events:
- Conference
- Workshop
- Panel discussion
- Focus group discussion

Relationship-building events:
- Party
- Meal
- Field trip
- Coffee
- Office visit
- Karaoke evening
- Local festival

In any case, the project team can record these and other stakeholder engagement activities in their Project plan and/or Project tracker (Box 6). Additional guidance on creating the Project plan and the Project tracker is provided in the connected Project Management for Wildlife Conservation best practice [10].

The project team can use these events to gather additional information to help them assess stakeholder support for the project (see Assess stakeholder support activity), identify additional stakeholders, and re-assess project effect and project need (see Selecting stakeholders).

Box 6. Project tracker.

Project tracker: Online document used to help plan and track the day-to-day progress of the project [1].

Assess stakeholder support

Using the Stakeholder engagement worksheet, the project team should describe and rate (strongly against, against, neutral, supportive, strongly supportive) the level of support for the project from each stakeholder [3]. Examples of descriptions and ratings of stakeholder support for the project are provided in Table 6.

Table 6. Example descriptions and ratings of stakeholder support.

Stakeholder	Description	Support rating
Beyond the Blue	Do not like that the project will compete for grant funds with them, but happy to accept funds from project if available	Neutral
Congress	Generally supportive of projects that may help build capacity of the Department of Wildlife Conservation	Supportive
Department of Wildlife Conservation	Think that project will not provide them with enough funds or equipment to cover the costs of staff participation	Against
Fish Finders	Do not like any work that may restrict their trade or reduce their profits	Strongly against
Joining the Dots	Do not have any strong positive or negative feelings about the project	Neutral
Local community leaders	Aware of local shark fishers and shark fishers' families' negative feelings toward the project	Against
Local shark fishers	Do not trust the project team's plans and motivations	Strongly against
Local shark fishers' families	Highly suspicious of the project team's plans and motivations	Strongly against
Local sports fishing tour operators	Local sports fishing tour operators are currently unaware of the project	Neutral
Mombasa Aquarium	Do not have any strong positive or negative feelings about the project	Neutral
Samaki	Have carried out similar work with the project team in the past	Strongly supportive
Saving Africa's Seas Foundation	Pakula Marine Reserve is within a high priority ecoregion for Saving Africa's Seas so they are keen to fund projects working to conserve marine life in that area	Supportive
SeaScape	Have carried out similar work with the project team in the past	Strongly supportive

Sufficient stakeholder support acquired?

If the project team judge that they have acquired sufficient stakeholder support, they can move on to Clarifying the relationship. If the project team judge that they have not acquired sufficient stakeholder support, then they should arrange additional information-sharing and relationship-building events until they do [11,17].

CLARIFYING THE RELATIONSHIP

Overview

Once the project team has initiated a relationship with each selected stakeholder and gained sufficient support to proceed, the next step is to ensure that all those involved have a clear, shared understanding of how they will be involved in the project. To create such a shared understanding, the project team may need to carry out joint planning, establish stakeholder roles, and document the relationship with each stakeholder. The project team should adapt these activities to suit the level of formality required to clarify the relationship with each stakeholder. The activities for this step are shown in Figure 9 and described in detail below.

Figure 9. Clarifying the relationship activities.

Carry out joint planning

The project team should arrange 1 or more joint planning workshops for key members of the project team and stakeholders to clarify [3,35]:

- What impact they want to achieve together: For example, the project team and local fishers may agree to reduce illegal manta ray fishing [11]. Guidance on planning impact is provided in the connected Strategy Development for Wildlife Conservation best practice [14].
- What work each will carry out: For example, the project team may commit to carrying out an awareness campaign, and a government department may commit to carry out more extensive patrolling efforts. Guidance on planning the work is provided in the connected Strategy Development for Wildlife Conservation best practice [14].
- How they will monitor and evaluate success: For example, the project team could work with a government department to agree on joint objectives and indicators to help assess the success of the project. Guidance on setting objectives and indicators is provided in the connected Monitoring and Evaluation for Wildlife Conservation best practice [15].
- How they will manage the work: For example, how the project team and other stakeholders will record, report on, discuss, and make changes to the activities they have agreed to do. Guidance on managing the work is provided in the connected Project Management for Wildlife Conservation best practice [10].
- What each will provide. For example, the local community leaders may offer the use of school buildings for some of the awareness-building activities. Likewise, the project team may commit to providing such things as office space, equipment, funds, and training opportunities to enable stakeholders to involve themselves in the project (see Enable involvement).

- What roles each will take. For example, the project team may take the Lead role, while local fishers may take a Partner role (see Establishing roles activity).

To ensure a fair and productive process, the project team should consider arranging for a skilled facilitator to run joint planning workshops (see Enable involvement principle) [20]. The outputs of joint planning workshops can be used as input for creating Joint plans and Joint agreements (see Document relationship). Likewise, the outputs of joint planning workshops can be used by the project team to create and/or adjust their own Project plan.

Carrying out joint planning workshops may lead to the identification of additional stakeholders by the project team, require them to re-assess the project effect, project need, project support, and stakeholder relationships (see Selecting stakeholders and Initiating the relationship).

Establish stakeholder roles

During the joint planning workshops (or in separate meetings if more appropriate), the project team should work with stakeholders to establish stakeholder roles for all those involved [22,33]. A stakeholder role is a temporary set of responsibilities and decision-making abilities that are agreed to by the stakeholder and project team. The more formal the relationship between the project team and the stakeholder, the more important it is to establish stakeholder roles, to help set expectations about their participation in the project. Stakeholder roles are made up of active roles and observer roles.

Active roles

Active roles are established for the project team and any other stakeholders that are carrying out joint work. The active roles are Lead, Partner, and Supplier. The responsibilities and decision-making abilities of these roles are described in Table 7.

Table 7. Responsibility and decision-making authority of active roles.

Role	Responsibility	Decision-making authority
Lead	Carrying out the project and reporting on project progress.	Decides on who to select as donors, partners, and suppliers Decides on assigning work to partners and suppliers Decides on any changes to the Project plan and when to close the project
Partner	Carrying out work that they agreed to do [2]	Decides on whether to continue carrying out the work assigned to them
Supplier	Carrying out work assigned to them	None

There should only be 1 Lead role, to ensure clear decision-making. There can be as many other active roles as needed. The Lead liaises with the other roles, rather than managing them directly.

To ensure clear decision making and accountability, the project team should take on the Lead role, and work with the other stakeholders to establish the Partner and Supplier roles for those selected stakeholders needed for participation in the project (see Assessing project need). The distribution of Lead and the other active roles is documented in the Joint plan (see Documenting the relationship activity). An example arrangement of active roles is shown in Figure 10.

Observer roles

Observer roles are established for stakeholders that are affected by or can affect the joint work, but that do not carry out any of the joint work themselves. The observer roles are Provider, Consulted party, and Adviser. The responsibilities and decision-making abilities of these roles are described in Table 8.

Table 8. Responsibility and decision-making authority of observer roles.

Role	Responsibility	Decision-making authority
Provider	Provide the project team with resources, such as equipment or funding	Decides whether to continue providing resources if the project is not adhering to the Joint agreement
Consulted party	Provide the project with permission to carry out activities	Decides whether to provide permission for project activities that require their consent to proceed
Adviser	Provides the project team with information and advice	Decides whether to provide information or advice to the project team

There can be as many observer roles as needed. The connection between the Lead and the Observer roles is determined by, and documented in, the Joint agreement (see Documenting the relationship).

The project team can establish the following Observer roles considering the project need and effect (see Selecting stakeholders):

- Provider roles for stakeholders needed for resources.
- Consulted party roles for stakeholders needed for consent and those with at least a high effect rating.
- Adviser roles for stakeholders needed for information.

An example arrangement of observer roles is shown in Figure 10.

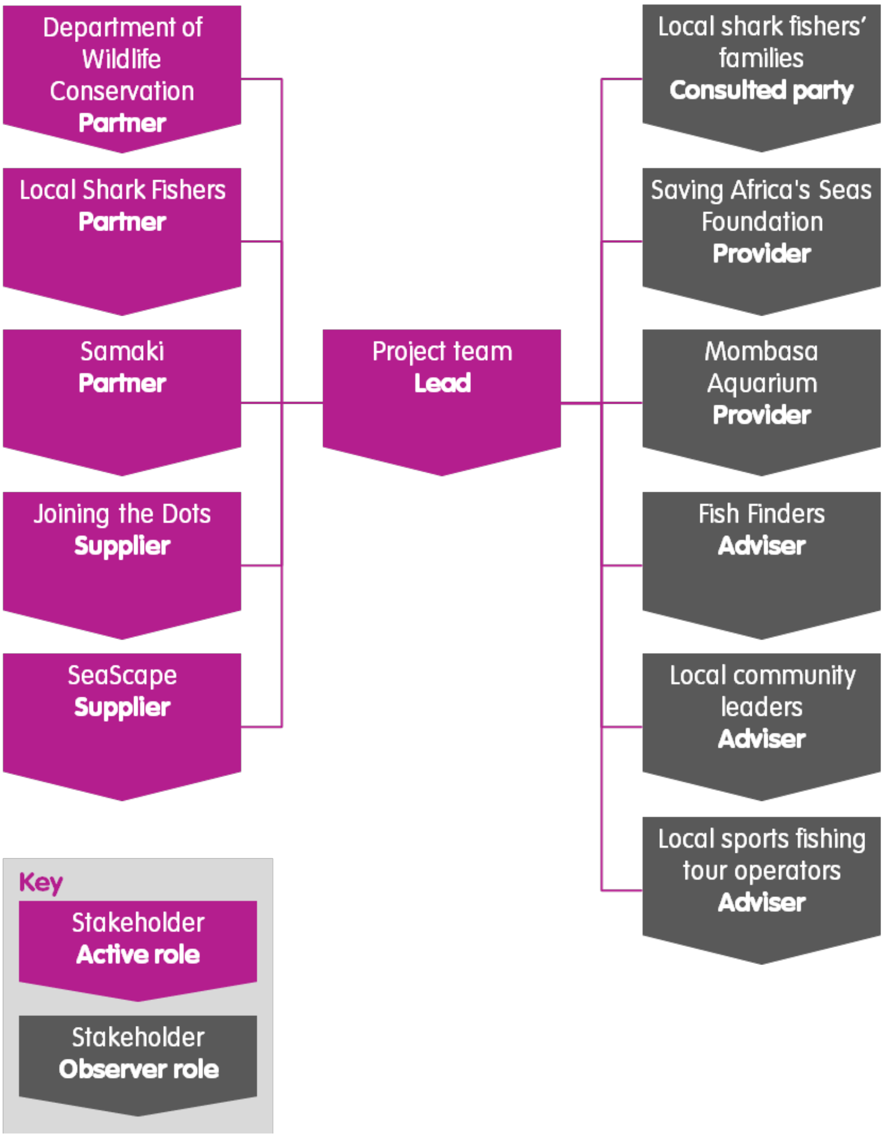


Figure 10. Example arrangement of observer roles.

Document relationship

The project team and stakeholders can use the outputs from their joint planning to document their relationship in either a Joint plan or Joint agreement, depending on whether the stakeholders have an active or an observer role.

Box 7. Example Joint plan sections

- Introduction
- Roles
- Conservation strategy
- Monitoring and evaluation
- Risks and issues
- Budget

To help manage the joint work, the project team should work with stakeholders that have an active role to create a Joint plan. The Joint plan will detail what the project team and stakeholders have agreed to, e.g. joint impact, schedule of activities, and budget (Box 7). The roles for creating a Joint plan are shown in Table 9. An example Joint plan is provided in Supporting resources.

To acquire resources or consent from, and/or maintain communication with stakeholders with observer roles, the project team should create a Joint agreement (Box 8) that documents all the information the project team and stakeholder require. For example, the Joint agreement may describe the whole conservation strategy, or may just outline the specific activities that the stakeholder decides to accept or provide resources for. The roles for developing a Joint agreement are shown in Table 9. An example Joint agreement is provided in Supporting resources.

Box 8. Example Joint agreement sections

- Introduction
- Roles
- Approved activities
- Legal requirements
- Reporting requirements

Table 9 Roles for developing Joint plans and Joint agreements.

Document	Lead	Other active stakeholders	Observer stakeholders
Joint plan	P, S	C, S	
Joint agreement	P, S		R, S

Note: S = Sign-off authority, R = Reviewer, P = Producer, C = Contributor.

Both the Joint plan and Joint agreement can take any form that is acceptable to the project team and stakeholder (Figure 11). For example, the Joint plan could be in the form of a shared conservation strategy [14], and the Joint Agreement may be in the form of a memorandum of understanding [8]. The Joint plan and Joint agreement may also document what each party is legally obliged to do, and what will happen if they do not fulfil their obligations. Guidance on the process for managing the creation of documents is provided in the connected Project Management for Wildlife Conservation best practice [10].

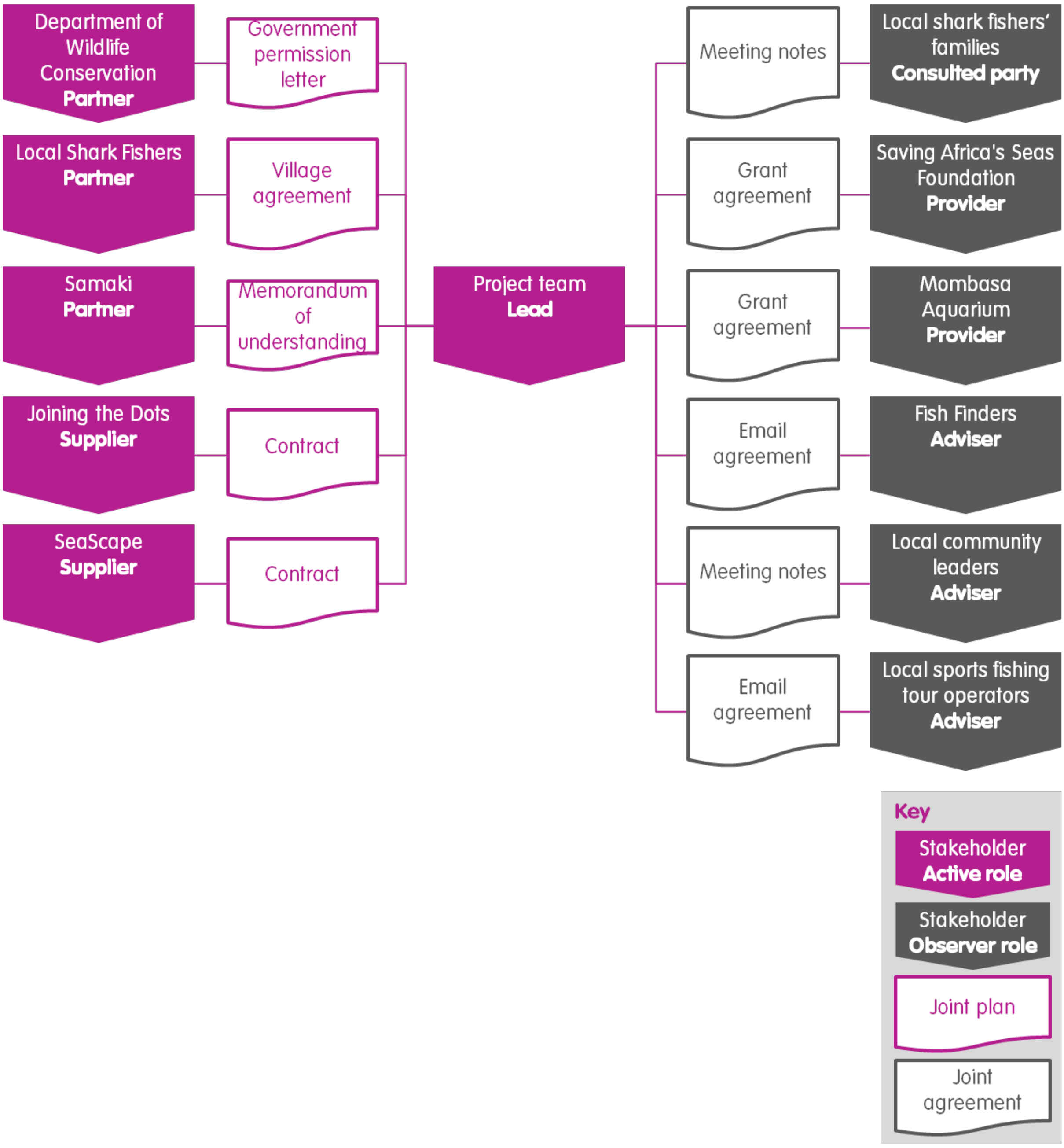


Figure 11. Example use of Joint plans and Joint agreements.

There should be an overlap in content between any Joint plan, Joint Agreement, and Project plan. The difference in content between these documents is that the Project plan will contain all the information the project team needs for managing the whole project. The Joint plan or Joint Agreement, however, will only document the specific information the project team and stakeholders need for managing their relationship.

MANAGING THE RELATIONSHIP

Overview

In their role of Lead, the project team will need to manage stakeholder relationships by:

- Nurturing relationships between all selected stakeholders.
- Managing progress of joint work with active stakeholders.
- Managing joint reporting with active stakeholders.
- Managing change in the relationships with all selected stakeholders.

This section provides guidance on each of these aspects of managing stakeholder relationships. Through these activities the project team may gain new information that requires them to re-assess the strength of stakeholder relationships and support for the project. The project team can then record any changes in stakeholder relationships and support for the project using the Stakeholder engagement worksheet. The project team can manage any changes to the stakeholder relationships and support following the managing change process documented in the connected Project Management for Wildlife Conservation best practice.

Nurturing relationships

Once the stakeholder relationships have been established, they can soon degrade if the project team do not pay sufficient attention to them [11]. For example, once the project team have developed a grant agreement, their relationship with a donor may degrade if they do not keep the donor regularly informed of project progress.

To nurture stakeholder relationships, therefore, the project team should arrange additional information-sharing and relationship-building events throughout the lifetime of the project. These events can include the project team and individual or multiple stakeholders (see Initiating the relationship). The project team can document these events in the Project plan and/or Project tracker. An example list of stakeholder engagement events is shown in Table 10.

Table 10. Example stakeholder engagement events.

Stakeholder	Year 1				Year 2				Year 3	
	Pakalu football tournament	Pakula Marine Reserve visit	Mid-year lessons learned workshop	Annual progress discussion	Pakula festival	Pakula Marine Reserve visit	Mid-year lessons learned workshop	Annual progress discussion	Shark conference	Project-end party
Department of Wildlife Conservation	x	x	x	x		x	x	x	x	x
Fish Finders	x		x			x	x			x
Joining the Dots		x	x				x		x	x
Local community leaders		x	x	x			x	x		x
Local shark fishers	x		x	x		x	x	x	x	x
Local shark fishers' families			x	x			x	x		x
Local sports fishing tour operators	x		x	x		x	x	x		x
Mombasa Aquarium		x	x				x		x	x
Samaki		x	x	x			x	x	x	x

Stakeholder	Year 1				Year 2				Year 3	
	Pakalu football tournament	Pakula Marine Reserve visit	Mid-year lessons learned workshop	Annual progress discussion	Pakula festival	Pakula Marine Reserve visit	Mid-year lessons learned workshop	Annual progress discussion	Shark conference	Project-end party
Saving Africa's Seas Foundation		x	x				x		x	x
SeaScape		x	x				x		x	x

Managing progress of joint work

As the Lead, the project team will work with Partners and Suppliers to carry out joint work. To manage the progress of joint work, the project team can use a Joint work tracker (see Supporting resources) to document the relevant information from the Joint plan. If useful, the project team can then share the Joint work tracker with the Partners and Suppliers.

If the Joint work tracker is shared with Partners and Suppliers, then the notes, actions, and decisions from joint status meetings can be documented in the Joint work tracker. If the Joint tracker is not shared with Partners and Suppliers, then the notes, actions, and decisions from joint status meetings can be documented in a Meeting report (see Supporting resources).

The Lead, Partners, and Suppliers can use a shared Joint project tracker to track progress of their joint work and to create Joint status reports. These Joint status reports can be used as inputs in joint status meetings when discussing the progress of their joint work. For example, the Lead, Partners, and Suppliers could have a joint status meeting to discuss and report back on their respective impact, milestones, and expenditure for the last month, and to go over planned impact, milestones, and expenditure for the next month.

Joint status meetings can also be used by the Lead, Partners, and Suppliers to identify any new information or changing conditions that may affect their joint work. If new information or changing conditions are identified, they can be used to make changes to the joint work. The project team can document the schedule of their planned joint status meetings in the Project plan and or Project tracker. An example schedule of joint status meetings is shown in Table 11.

Detailed guidance on managing meetings and managing progress using trackers and reports is provided in the connected Project Management for Wildlife Conservation best practice [10].

Table 11. Example schedule of joint status meetings.

Stakeholder	Monthly joint status meetings	Quarterly joint status meetings	Annual joint status meetings
Department of Wildlife Conservation			x
Joining the Dots	x	x	x
Local community leaders			x
Local shark fishers			x
Samaki	x	x	x
SeaScape		x	x

Managing joint reporting

During the course of the project, the project team and other active stakeholders should provide regular updates on the progress of their work to observer stakeholders and unselected stakeholders [7]. Likewise, the project team and other active stakeholders will also need to communicate what they have achieved at the end of the joint work. The project team and other active stakeholders can provide these updates and communications as joint reports. The active stakeholders can use the content of their status reports to help generate these joint reports. The project team and other active stakeholders should ensure that their joint reports acknowledge the involvement of all selected stakeholders, and are provided in a way that enables the audience to document their perspective, ask questions, or raise any grievances. The roles for creating Joint reports are shown in Table 12. Additional guidance on creating documents such as Joint reports is provided in the connected Project Management for Wildlife Conservation best practice [15].

Table 12. Roles for creating Joint reports.

Document	Lead	Other active stakeholder
Joint report	P, S	C, S

Note: S = Sign-off authority, P = Producer, C = Contributor.

Managing change in the relationship

During the project, changing conditions or the emergence of new information will sometimes mean that the project team and/or stakeholders will no longer be able to carry out the Joint plan or Joint agreement. For example, a change in visa requirements may delay the arrival of key project team members, meaning that they can no longer carry out the planned awareness campaign to the schedule agreed with the Department of Wildlife Conservation in their government permission letter.

In other cases, changes in stakeholder support and relationships during the project may mean that stakeholders no longer want to continue with the Joint plan or Joint Agreement, even if the shared objectives can still be achieved. For example, local shark fishers may want to stop participating in the project because they feel like their views are not being properly taken into consideration by the project team. To help avoid this situation, the project team should set up a process for all stakeholders to raise their grievances and have them responded to. If useful and appropriate, the project team can also make this grievance process available for unselected stakeholders. When the project has ended or the relationship has changed, the project team and stakeholders will need to decide between either updating or ending the Joint plan or Joint agreement. Detailed guidance on managing change is provided in the connected Project Management for Wildlife Conservation best practice [10].

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