



Collaborative Action Toolkit

For internal alignment and external engagement



Developed by
Keystone and Dow



Origins of the Toolkit

The **Collaborative Action Toolkit** was designed in partnership with Keystone and Dow as part of Dow's 2025 Sustainability Goals which include creating collaborative roadmaps, or blueprints. The goal was to develop a "blueprint thinking" framework by which teams within Dow could communicate with external stakeholders and engage partners in collaborative work.

The original "Blueprint Thinking Toolkit" was tailored to Dow's processes and was applied to existing projects by Dow teams, who adapted versions for their own use and helped the Keystone team to improve the original. Dow also created a complementary internal training platform to guide future Dow teams on using the "Blueprint Thinking Toolkit".

The Keystone and Dow teams worked to broaden the Dow toolkit to create the **Collaborative Action Toolkit** which is more generic and can be utilized by everyone, beyond Dow. The Toolkit takes the form of an Excel spreadsheet, and this explanatory slide deck.

Note on Usage of the Toolkit

The **Collaborative Action Toolkit** is designed to enable organizations to confidently engage with external entities in ways that are mutually beneficial.

- The Toolkit is an excel workbook with this accompanying how-to presentation.
- The objective of this toolkit is to provide a framework to follow and thought-provoking questions to help you and your team think outside the box.
- You do not need to complete each of the toolkit sections in detail or adhere to its spreadsheet format. The recommended stages make sense for many projects, but EVERY project will be different.
- Planning for external engagement is not necessarily a linear process. Some of its stages may happen in a different order, in parallel, or in multiple iterations.

The path to effective external engagement and shared value is both winding and rewarding!

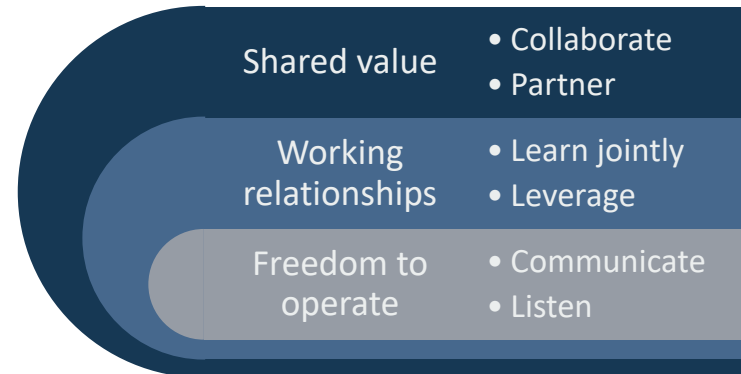
Reasons to Engage Externally

Why is it worth the effort?

- Some challenges and opportunities require more than a single organization or even a whole sector to overcome/realize
 - External parties may have additional authority, expertise, or resources
- Successful strategic relationships can open doors, enhancing credibility and influence
 - Especially important when the company's freedom to operate is threatened, or when there's a need for realistic navigation of tradeoffs
- Solutions can be stronger coming from unexpected partnerships, expanding audiences and accelerating policy change

Increased benefits from increased engagement

- Benefits from engagement range from the basic freedom to operate to fully realized shared value, requiring increasing degrees of engagement to realize



Stages of Collaboration

PROJECT ALIGNMENT

Design and solidify a project strategy, and assemble internal resources

STAKEHOLDER MAPPING

Identify and prioritize external stakeholders for mutually beneficial engagement

EXTERNAL ENGAGEMENT

Plan for working relationships and external communications with select organizations and audiences

Collaborative Stages and Toolkit Sections

| Collaborative Stage | Toolkit Section | Purpose |
|---------------------------------------|----------------------------|--|
| PROJECT ALIGNMENT | Internal alignment | Clarify a project strategy, need for engagement. Build your team |
| | Materials and case studies | Capture lessons learned and compile applicable information |
| STAKEHOLDER MAPPING | Stakeholder landscape | Define your project and build a stakeholder list |
| | Stakeholder map | Strategize engagement with specific stakeholders |
| EXTERNAL ENGAGEMENT AND COLLABORATION | Engagement and action plan | Clarify roles and responsibilities with external stakeholders |
| | Inter-org communications | Strategize communications with external organizations |
| | External communications | Strategize communications with broader external audiences |

Project Alignment - Internal Alignment

| Internal alignment section | |
|----------------------------|---|
| Project strategy | <p>Take time here to get clear on what you are trying to do with the engagement initiative, starting with the challenge you are trying to overcome or the opportunity you are pursuing.</p> <p>Clarifying the benefits of collaboration will give you directional guidance throughout your project and help you promote and defend it internally.</p> <p>A clear scope, constraints, and metrics for success will supply the necessary sideboards to keep the project focused.</p> <p>Often the risks of engaging are more evident than the risks of doing nothing. Take a moment to consider what would happen if you did nothing.</p> |

| | A | B |
|----|---|---|
| 1 | Internal Alignment | |
| 2 | <i>The purpose of this worksheet is to think through your options and marshal internal alignment and resources.</i> | |
| 3 | Project strategy | |
| 4 | Project challenge and opportunity statement | <p>Break down each goal into its constituent parts and ask "why" each part is needed. The answers to these questions are the underlying, fundamental interests that need to be met to hold up your organizational strategy.</p> |
| 5 | Project goals | |
| 6 | Connection to organizational strategy | |
| 7 | Fundamental interests | |
| 8 | Activities | |
| 9 | Inputs | <p>What are the topical sideboards that define the project? Having a clear scope statement up front will prevent implicit scope creep.</p> |
| 10 | Outputs | |
| 11 | Outcomes | |
| 12 | Project scope statement | <p>How will you measure progress made towards meeting your fundamental interests? How much progress should be made by which intervals?</p> |
| 13 | Constraints | |
| 14 | Metrics and benchmarks for success | <p>In addition to the benefits sought by engaging, what is the risk sustained by taking no action?</p> |
| 15 | Benefits sought by engaging externally | |
| 16 | Potential loss or risk from the status quo | |

Project Alignment - Internal Alignment

| Internal alignment section | |
|----------------------------|---|
| Internal Team | <p>Building an internal team intentionally, with clear roles from the beginning will promote efficiency and prevent misunderstandings later.</p> <p>Draw on your organization's resources to ensure you get started on the right foot.</p> <p>Consider bringing in a third party to facilitate information gathering, collaborative process design, or be on hand to assist with difficult issues that arise.</p> |

| | Internal team |
|----|--|
| 17 | |
| 18 | Responsible |
| 19 | Accountable |
| 20 | Consulted |
| 21 | Informed |
| | Other departments (e.g. legal, government affairs, public affairs, etc) |
| 22 | |
| 23 | Range of perspectives |
| 24 | Third parties |
| 25 | |
| 26 | |
| 27 | |
| 28 | |

For the project as a whole, who will be responsible for generating deliverables?

Internally between team members and departments, is there agreement on the definition of the problem? Is there agreement on possible solutions? If not, what is the current range of perspectives?

Which other departments in your organization do you need to engage to benefit from their expertise, perspective, and network connections?

A contracted third party organization such as Keystone Policy Center can assist organizations to come to agreement on procedure and substance from a disinterested point of view. Impartial facilitation, mediation, and project management can allow substantially engaged organizations to focus on their own interests with confidence that the process will be fair and balanced.

Note on Third parties

Keystone and other partners or third parties can be helpful in implementing engagement in the following ways:

- Gathering and summarizing stakeholder feedback on a specific issue to understand perspectives, identify needs, and overall willingness to engage
- Consulting on overall strategy for engagement on difficult issues where more than one partner will be needed or where there is some level of tension with potential partners
- Helping design and define and convene multi-stakeholder processes to reach effective outcomes
- Reviewing overall engagements in an area and facilitating discussions about high-value engagements and priorities versus participation in others.
- Providing skills training on negotiation and engagement

Project Alignment – Materials and Case Studies

Materials and case studies section

Materials and case studies

This space is a catch-all for applicable links, case studies, and other information that is applicable to your project. It is organized to keep distinct those materials that are approved for external sharing and those that need to remain internal.

Links have been provided to sections further on that will reference back to the information compiled here.

This page will serve as your source for lessons learned, your reference for accessing existing networks and relationships, and as a source of engaging stories for communications.

| | A | B |
|----|---|--|
| 1 | Materials and Case Studies | |
| | <i>The purpose of this worksheet is to collect relevant reference materials informative at several stages of your project. It has been organized to group together topic-specific research and lessons learned from case studies.</i> | |
| 2 | <i>Add additional sections as necessary as you gather information.</i> | |
| 3 | Go to Stakeholder Landscape sheet | |
| 4 | Go to the Inter-Org Communications sheet | |
| 5 | Go to the External Communications sheet | |
| 6 | Section 1 | |
| 7 | Title/topic/case study | |
| 8 | Description | |
| 9 | Available materials - approved for external use | For example: press releases, scientific articles, approved presentations |
| 10 | Available materials - internal | |
| 11 | Section 2 | |
| 12 | Title/topic/case study | |
| 13 | Description | |
| 14 | Available materials - approved for external use | |
| 15 | Available materials - internal | |

Stakeholder mapping – Stakeholder Landscape

| Stakeholder landscape section | |
|-------------------------------|---|
| Project definition | These fields auto-populate from your work in the Internal Alignment section, ensuring that your project's core goals, scope, and constraints are quickly at hand. |
| Landscape assessment | <p>The landscape assessment encourages you to double check your reasoning for external engagement and think as broadly as possible about the value of engaging different sectors and multiple stakeholders.</p> <p>This sheet links to several in-toolkit resources to pair with your own reasoning and research to paint a picture of the stakeholder landscape around your project or issue area.</p> |

| | A | B |
|----|--|---|
| 1 | Stakeholder Landscape | |
| 2 | <i>The purpose of this worksheet is to clarify the need and purpose for engaging with specific external organizations and representatives.</i> | |
| 3 | Project definition (populated from Internal Alignment sheet) | |
| 4 | Project challenge and opportunity statement | 0 |
| 5 | Project scope statement | 0 |
| 6 | Constraints | 0 |
| 7 | Project goals | 0 |
| 8 | Fundamental interests | 0 |
| 9 | Landscape assessment | |
| 10 | Reason for engaging stakeholders | <p>What is the value your organization hopes to gain from stakeholder engagement? This goal will determine which sectors need to be engaged and what modes of engagement are chosen.</p> |
| 11 | Other similar efforts, applicable case studies | |
| 12 | Comparative advantage of this project | |
| 13 | Sectors to engage | <p>Are there similar projects that can offer lessons learned for this one? Draw from your materials and case studies.</p> |
| 14 | Full stakeholder list | |
| 15 | Stakeholders to consider engaging | <p>Which sectors need to be engaged to maximize the project's potential for success? Each sector has potential strengths and limitations. Engaging a diverse range of sectors will enhance the external credibility of a project.</p> |
| 16 | | <p>In what ways does the project establish a comparative advantage over business as usual? Is there a corollary with an existing case study, or does this project have an original approach?</p> |
| 17 | | |
| | | <p>Which external organizations are connected to the scope of the project, and how? (e.g. invested in an outcome, capable of leveraging results, influential or trusted in the space) Keep asking the question "who is missing from this list?" both internally and of those stakeholders you have identified. The goal is to create a list that is representative of every major perspective on the issue.</p> |

Value from Engagement

What kind/amount of value do you hope to get from engaging externally?

- Each subsequent tier of engagement requires first achieving the goals of the tier before it.
- The more value you hope to gain, generally the more intensive and/or long-term the exchange needs to be.
- Value can be gained from honest, transparent two-way communication, even when the entities involved remain in disagreement.

| | A | B |
|---|--|---|
| 1 | Value from Engagement | |
| 2 | Why do you want or need an external entity involved? | |
| 3 | Back to stakeholder map | |
| 4 | Reason | Description |
| 5 | 1) Establish the freedom to operate | The first tier of engagement involves productively addressing significant challenges to the company's ability to make key decisions, like developing and marketing certain products or siting facilities. To gain credibility, an organization must be willing both to talk and to listen to its critics as well as its supporters. |
| 6 | 2) Build a productive working relationship | Second tier engagement involves sharing resources to achieve complementary objectives. Whether funding, time, perspective, or access to an audience is exchanged, a lasting working relationship benefits both parties. |
| 7 | 3) Build a product with lasting shared value | Third tier engagement involves a two-way exchange of ideas to determine a common path forward. Shared projects require the effort to seek agreement on content, process, and communication. In return, they deliver long-term value supported by a wider range of entities than those undertaken unilaterally. |
| 8 | Back to stakeholder map | |

Sector Strengths and Dynamics

Consider the pros and cons of certain sectors and players.

- You don't have to partner with everyone, but you should know who has the key viewpoints surrounding your goal.
 - Is there a reason why you aren't including a certain sector or player, or have they been overlooked?
 - Have you included people with opposing viewpoints to each other and to your own organization?

Typical Sector Dynamics

Descriptions below are generalizations that can vary significantly between organizations

[Back to stakeholder map](#)

| Sector | Their interests/needs | Value they can offer | Potential limitations to partnership |
|-----------------------------|--|--|--|
| Academic | Access to research capacity, funding for research, and opportunities for research | Research capacity; credibility | Can take a very deliberative approach; research findings and communications are usually public (subject to FOIA request) |
| Government - local | The health, safety, and economic development and wellbeing of the community they represent | Credibility with local constituents | Perspective is geographically limited; time and money can be limited; representatives can turn over frequently |
| Government - state/regional | The health, safety, and economic development and wellbeing of the area they represent; potential regulatory entities | Access to state-scale funding and connection with projects; regulatory oversight | Can be slow to change; funding may be limited; representatives may not have full decision making power; communications are public (subject to sunshine laws) |
| Government - national | The health, safety, and economic development and wellbeing of the country they represent; potential regulatory entities | Access to national-scale funding; regulatory oversight; provision of widely accepted standards backed up by regulations and incentives | Can be slow to change; representatives may not have full decision making power; communications are public (subject to FOIA requests); different agencies have different missions (e.g. aid, regulatory, technical assistance) |
| NGO - advocacy | Serving the mission of their organization through public campaigns that call attention to issues and lobbying public officials | Credibility with an issue-focused membership; strong brand associations | Will have little flexibility concerning mission-focused activities; may have internal conflict about partnering with external organizations; fundraising objectives may intertwine with mission objectives; partnering with private sector may be counter to their mission |

| | | | |
|-----------------------------------|---|--|--|
| NGO - partner | Serving the mission of their organization through partnering with key actors to identify and implement change | Credibility with an issue-focused membership; strong brand associations; diverse network of partners; issue-specific expertise | Will have little flexibility concerning mission-focused activities; may have internal conflict about partnering with specific external organizations; may build organizational capacity around partnership that can make sunseting difficult |
| NGO - foundation | Supporting projects that maximize the effect of their funding on achieving their mission | Funding support for mission aligned projects; network connections to other stakeholders | Tend to have limited capacity to engage substantially with an issue; grant requirements can be onerous, particularly for projects that evolve over time; funding rules require that grants be made to 501(c)(3) organizations |
| Supply chain - upstream company | Maintain a profitable relationship with their downstream buyer | Can provide data and stories directly associated with an organization's supply; expertise about raw materials | Relationship can be limited due to client-buyer tensions and anti-trust considerations |
| Supply chain - downstream company | Maintain a reasonably priced and consistent supply of product from their upstream supplier | Can communicate a supply chain story to the end consumer, potentially scope demand for a new or premium product | Relationship can be limited due to client-buyer tensions and anti-trust considerations |

Stakeholder mapping – Stakeholder Map

Stakeholder map section

Detailed stakeholder assessment

Using all of the sources of value compiled in the previous sections, choose a few organizations to evaluate in detail.

Consider this a cost-benefit analysis of how much effort it may take for the benefit a relationship with them may be able to provide.

Lastly, select a desired mode of engagement for each stakeholder, for which a reference has been provided.

| | A | B | C | D |
|----|--|----------------------|----------------------|----------------------|
| 1 | Stakeholder Map | | | |
| 2 | <i>The purpose of this worksheet is to evaluate the relative benefits of engaging with each stakeholder identified in the Stakeholder Landscape assessment and strategize the appropriate mode of engagement for them.</i> | | | |
| 3 | Detailed stakeholder assessment | | | |
| 4 | | Stakeholder 1 | Stakeholder 2 | Stakeholder 3 |
| 5 | Organization name | | | |
| 6 | Sector | (select one) | (select one) | (select one) |
| 7 | Sector detail | | | |
| 8 | Value they can offer | | | |
| 9 | Previous/current relationships with your organization | | | |
| 10 | Points of contact | | | |
| 11 | Their interests/needs | | | |
| 12 | Likely and known joint objectives | | | |
| 13 | Anticipated differences in interests, perspectives | | | |
| 14 | Desired degree of influence | | | |
| 15 | Initial ideas for moving towards alignment | | | |
| 16 | Estimate of financial and other substantial contributions | | | |
| 17 | Estimate of potential time commitment | | | |
| 18 | Desired mode of engagement | (select one) | (select one) | (select one) |
| 19 | Preferred professional roles of engaged representatives | | | |
| 20 | | | | |
| 21 | | | | |
| 22 | | | | |

Ideally, this is where a new relationship will begin and potentially see the most fruitful results, in pursuit of joint objectives.

How can this organization augment the abilities of your organization and/or clear the path for your project? Draw from "Reasons for engaging..." and "Sectors to engage" sections in your Stakeholder Landscape, and add detail specific to the organization.

How do the goals and methods of the external organization differ from those of your organization? In what context might these differences potentially make collaboration difficult?

Will you try to persuade or just listen? Is your organization prepared to adapt/modify a stance or just communicate it? Is there a way to gain value from the relationship without triggering sensitive issues?

(select one)
 (select one)
 Networks for information sharing
 Listening sessions
 Joint fact-finding
 Advisory bodies
 Strategic partnerships
 Multi-stakeholder dialogues

Modes of External Engagement

Consider how intensive you would like your engagement to be.

- The more intensive the engagement, the more give-and-take it will require between your organization and external entities and the more investment will be required all around.
- In addition to increased investment, the more intensive modes of engagement will require sharing ownership and authority over the project and its results with other entities.
- In return for increased investment and shared ownership, any product that comes from a more intensive mode will likely have more buy-in and lower hurdles to implementation than those produced less collaboratively.

| | A | B | C | D | E |
|----|---|---|-------------------------------|----------------------------|---|
| 1 | Modes of External Engagement | | | | |
| 2 | <i>Engagement can be seen as a continuum of complexity, beginning with single-directional communication and transitioning all the way to joint decision-making. The more complex the engagement, the more value can potentially be shared over the longer term.</i> | | | | |
| 3 | Back to Stakeholder Map | | | | |
| 4 | Mode | Description | Level of collaboration | Level of investment | Expectations of other stakeholders |
| 5 | Networks for information sharing | These networks may include trade associations, conferences or other member groups that collect and share information on issues of importance and test that information across different perspectives | Low | Low to Medium | Low |
| 6 | Listening sessions | When there is unlikely to be agreement or an issue is in the early stages of understanding, listening sessions can be a way to hear other stakeholder points of view and expand understanding of an issue and share your early thinking | Low | Low to Medium | Low |
| 7 | Joint fact-finding | Involves forming a single fact-finding team comprised of experts and decision-makers representing different perspectives or interests, so that the resulting information can help create a shared knowledge base | Medium | Medium | Medium |
| 8 | Advisory bodies | Advisory bodies can engage thought leaders, lead subject matter experts, and other stakeholder leadership in company-specific advice in a sustained way. These can be helpful for informing corporate leadership and identifying opportunities for further engagement | Medium | Medium | Medium to High |
| 9 | Strategic partnerships | Strategic partnerships can help identify a set of focused activities to forward shared interests amongst 2-3 entities and provide flagship opportunities to demonstrate impact | High | High | High |
| 10 | Multi-stakeholder dialogues | When an issue has been identified that cannot be solved by one entity or sector alone, multi-stakeholder dialogues can help identify joint activities, metrics, and ways of leveraging collective knowledge, resources, and influence | High | High | High |

External Engagement – Engagement Plan

Engagement plan section

Project definition and approach – Internal

This section should be used if you are considering a partnership or collaborative working relationship with an external entity. The next section covers communications.

A good first step of effective collaboration is to "know thyself". The fields in this section should be used as a guided meditation of what really matters to your organization.

The project goals, scope, and constraints have been brought forward again from the internal alignment section to ground your thinking.

| | A | B |
|----|--|---|
| 1 | Engagement Plan | |
| 2 | <i>The purpose of this worksheet is to clarify roles, responsibilities, and terms of engagement for all parties to a collaborative project/program</i> | |
| 3 | Ground rules | |
| 4 | Project challenge and opportunity statement | Lines 4-8 populated from Internal Alignment section |
| 5 | Project scope statement | |
| 6 | Constraints | |
| 7 | Project goals | |
| 8 | Fundamental interests | Ideally, what future will this external engagement result in? |
| 9 | Vision of collaborative success | What form of documentation do your relationships require - contract, MOU, etc - to ensure that your plan is realized without misunderstanding or liability? Check internally with legal counsel for advice and resources. |
| 10 | Conditions for collaborative success | |
| 11 | Legal Assurance | Given the needs, interests, and perspective of the external party/ies, what conditions will enable your vision of success? |
| 12 | Considerations regarding external affairs | |
| 13 | Expected value to stakeholders and/or existing commitments | Be clear on your organization's value proposition: Can you quantify an ROI for this engagement? |
| 14 | Conditions triggering an evaluation of continued engagement | How does this engagement fit in with your organization's existing relationships and commitments? Check internally with your external affairs office(s) for advice and resources. |

External Engagement – Engagement Plan

| Engagement plan section | |
|-------------------------------------|---|
| Charter components - Joint | A charter sets the “how” of an effective working relationship, including a joint focus, direction, and expectations. |
| Work plan components - Joint | <p>A work plan sets the “what and by when” of a joint project, including deliverables, milestones, and what it will take to declare fulfillment.</p> <p>Recognizing that all projects, especially collaborative ones, will change with changing circumstances, it is especially helpful to schedule points in time when the direction and progress of the project can be evaluated and course corrected. They are referred to here as “adaptive checkpoints.”</p> |

| Charter components - Joint | |
|------------------------------|--|
| 15 | |
| 16 | Joint vision |
| 17 | Joint scope |
| 18 | Joint constraints |
| 19 | Joint goals |
| 20 | Your organization's role |
| 21 | Other participants' roles |
| 22 | Mutual funding commitment |
| 23 | Responsibilities of representatives |
| 24 | Third parties |
| 25 | Decision-making criteria |
| 26 | Ground rules |
| 27 | Communications guidelines |
| 28 | Sunsetting process |
| Work plan components - Joint | |
| 29 | |
| 30 | Deliverables, deadlines, and responsible party |
| 31 | Intermediate goals and milestones |
| 32 | Adaptive checkpoints |
| 33 | Completion criteria and conditions for nonfulfillment |
| 34 | Acceptance |
| 35 | |

What is the mutually agreed upon topical definition of the project being entered into jointly?

Does your organization retain any special decision-making authority in this relationship, or are decisions made jointly?

How will decisions be made - by consensus, by vote, or by a single ultimate decision-maker?

What is the process by which a party can communicate publicly? Often, collaborative efforts require confidentiality about discussions and communication only of jointly approved messages.

What is the process by which the parties to the agreement can bring the collaborative effort to a close?

What are the major deliverables, deadlines, and responsible parties that can be anticipated to realize the parties' joint goals?

Given the uncertainty of collaborative work, it is smart to build in regular check in points for communication and evaluation/revision of the work plan components.

What factors need to be in place for the work plan to be considered fulfilled?

External Engagement – Inter-org Communications

| Inter-org communications section | |
|----------------------------------|--|
| Project definition | The project goals and their connection to your organization's strategy have been auto-populated here to serve as a foundation for evaluating your org's perspective on an issue. |
| Your org's perspective | <p>"Know thyself" applies here as much as it did with the engagement plan. These fields ask you to think about what portions of your org's perspective are founded on its fundamental interests and which may be flexible in response to new information or altered circumstances.</p> <p>Your degree of flex can be hard to predict, instead emerging organically as part of an ongoing external relationship. What is important here is checking your interests and entering into inter-organizational communications with an open mind.</p> |

| | A | B |
|----|---|--|
| 1 | Inter-Org Communications | |
| 2 | <i>The purpose of this worksheet is to be an internal resource that enables responsive organization-to-organization communication</i> | |
| 3 | Project Definition (populated from Internal Alignment sheet) | |
| 4 | Project challenge and opportunity statement | 0 |
| 5 | Project goals | 0 |
| 6 | Connection to organizational strategy | 0 |
| 7 | Fundamental interests | 0 |
| 8 | Your organization's perspective | |
| 9 | Issue requiring communication | <p>What is an issue about which your organization would like to communicate and on which its audience will likely disagree?</p> |
| 10 | Your organization's current perspective on the issue | |
| 11 | Conditions under which your organization might be flexible to shift perspective | <p>Is there anything your organization needs to know from its audience to make sound decisions, whether about the audience's perspective on the issue or on your organization, itself?</p> |
| 12 | Your organization's information needs from audience | |

Are there aspects of the your organization's perspective that are less firm than others? Look for aspects that are not firmly connected to the fundamental interests copied above. Is there a context in which your organization would have a different perspective?

External Engagement – Inter-org Communications

| Inter-org communications section | |
|----------------------------------|---|
| Audience perspective | <p>With your own interests in mind, this next step draws on your research into your counterpart organization.</p> <p>Effective communication begins with the audience in mind and speaks to their core values and information needs.</p> |
| Crafting a message | <p>Persuasion is both difficult and incremental when an entity's beliefs are founded on their core values. Be sure to set your expectations appropriately and embrace the goals of developing a shared understanding of an issue, even if minds don't change as a result.</p> <p>Stories and trusted sources of information will go a long way to making your audience more receptive to any message you develop.</p> |

| | | |
|----|---|--|
| 13 | Audience perspective | |
| 14 | Audience/stakeholders being targeted (sector, organizations, individuals) | The more specific the audience, the more targeted and therefore potentially effective the communication. |
| 15 | Reasoning for audience choice | |
| 16 | Audience core values | What are the likely values of your audience, whether the priorities of individuals or the missions of organizations? |
| 17 | Audience current perspective on the issue | |
| 18 | Degree audience might be flexible to shift perspective on the issue | How closely does your organization's perspective come to threatening one of the audience's core values? |
| 19 | Audience information needs | |
| 20 | Crafting a message | |
| 21 | Goals from communication with this audience | Is the goal to persuade the audience, and if so of what part of your organization's perspective? Is the goal to keep the audience informed or to generate good will, even with sustained disagreement? Do you wish to issue a call to action? If so, how do you want your audience to respond? |
| 22 | Key points the audience needs to hear | |
| 23 | How key points relate to audience's values | What relatable stories illustrate the key points? Narrative construction can be persuasive. Reference your Materials and Case Studies, and consider interviewing internal stakeholders to bolster this information source. |
| 24 | <u>Stories/examples that illustrate key points</u> | |
| 25 | Rationale/sources respected by audience to back up key points | Which sources of factual information does the audience respect? Is there any way to build proof from information from these sources? |
| 26 | your organization's message to this audience | Who is likely to be credible and effective in delivering this message? Consider your organization's employees, external partners, and third party experts. |
| 27 | Messenger(s) likely to be respected by audience | |

External Engagement – External Communications

External communications section

| | |
|---|--|
| Project definition and audience selection and perspective | These sections are similar to those in the Inter-org communications section |
| Crafting a message | Double check that any external comms about a collaborative effort are responsive to the charter's communications guidelines. |
| Designing and producing communications | Consider engaging Public Affairs, your communications experts for resources and recommendations. |

Inter-Org Communications

The purpose of this worksheet is to be an internal resource that enables responsive organization-to-organization communication

Project Definition (populated from Internal Alignment sheet)

| | |
|---|---|
| Project challenge and opportunity statement | 0 |
| Project goals | 0 |
| Connection to organizational strategy | 0 |
| Fundamental interests | 0 |

Your organization's perspective

Issue requiring communication

What is an issue about which your organization would like to communicate and on which its audience will likely disagree?

Are there aspects of the your organization's perspective that are less firm than others? Look for aspects that are not firmly connected to the fundamental interests cited above. Is there a context in which your organization would have a different perspective?

What is anything your organization needs to know from its audience to make sound decisions, whether about the audience's perspective on the issue or on your organization, itself?

Conditions under which your organization might be flexible to shift perspective

Your organization's information needs from audience

The first part of this section is nearly identical to the Inter-org comms section.

Crafting a message

| | | |
|----|--|--|
| 15 | Goals from communication with this | What are the main points your organization would like to communicate to this audience? Clarify which topics/examples, if shared, will produce collaborative opportunities and which, if held, will enable further internal development and maintain/build competitive advantage. |
| 16 | Key points the audience needs to hear | |
| 17 | How key points relate to audience's values | |
| 18 | Stories/examples that illustrate key points | Where are there connections between the key points and the audience's likely core values? Leading with joint values can be persuasive. |
| 19 | Rationale/sources respected by audience to back up key points | Which sources of factual information does the audience respect? Is there any way to build proof from information from these sources? |
| 20 | Restrictions on communications | |
| 21 | Your organization's message to this audience | Given all of the above, what is the briefest form of the externally facing message you would like to deliver to the audience? |

Designing and producing communications

| | | |
|----|--|---|
| 23 | Internal communications resources | Consider engaging professional communications staff to help strategize and organize your overall messages and connect you to additional internal and external resources |
| 24 | Needed depth of message | |
| 25 | Mode of communication | |
| 26 | Venue for launch | |
| 27 | Messenger(s) likely to be respected by audience | |

In Practice: Dow Blueprint Thinking

Dow's Blueprint on Sustainable Watershed Management

Dow's blueprint on [Sustainable Watershed Management](#) helped the organization develop a tailored collaborative approach for external engagement on its watershed management goals. The following learnings occurred by working through the toolkit:



- **Project Alignment:** Dow identified three priority areas in watershed management but also realized that with so many internal organizational changes at the time, there were no clear internal “owners” or “drivers” for Dow’s water strategy. Dow decided to focus on creating a catalogue or one-stop-shop of water-related case studies to share internally and externally to pave the way for an informed future aligned water strategy.
- **Stakeholder Mapping:** Dow determined that applying broad stakeholder mapping techniques for large-scale water collaborations would be difficult and not as helpful because many water collaborations are local and site-specific, requiring miniature stakeholder maps and collaboration roadmaps for each site.
- **External Engagement:** Dow created a page on its website to share case studies and priorities on watershed management. The case studies provide best practices that are simple to implement for other organizations looking to achieve watershed management sustainability initiatives.

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From Blueprint to Action: Water Use in Terneuzen, Netherlands - full case study

Dow's blueprint on [Sustainable Watershed Management](#) highlights Dow's collaborative approach to watershed management in the communities where they live and work. Notably, a case study on the first-of-its-kind watershed collaboration to reuse local municipal water for Dow's industrial processes in Terneuzen, The Netherlands is included in the blueprint, which exemplifies the Blueprint Thinking (Collaborative Action) process.



For more information

Contact: Jonathan Geurts
Senior Project Manager
Keystone Policy Center
jgeurts@keystone.org