



Tool

# Meaningful stakeholder dialogue Checklist multi-stakeholder dialogue meeting abroad

SEER





## Introduction

This tool is part of a collection of resources, including tools, knowledge documents, and training, designed to help companies prepare and conduct [meaningful dialogues](#) with their stakeholders. Meaningful stakeholder engagement is fundamental for (International) Responsible Business Conduct (IRBC) and is reflected in [all steps of the due diligence process](#) as included in the OECD guidelines.

To ensure a meaningful dialogue, the organisation of the meeting itself is crucial, as it sets the tone for the dialogue. Below is a checklist that covers both substance-related and practical aspects, for organising a multi-stakeholder dialogue meeting abroad, e.g. in a production country in Asia.

As you go through the checklist, ensure that the substance-related and practical preparations are aligned. It is important to address both simultaneously to create a consistent approach.

## Substance-related preparations

**Complete steps 1 through 6 in the [tool](#) 'Towards a meaningful dialogue in 9 steps'**

- Step 1: Understanding your company's motivation for stakeholder dialogue
- Step 2: Working on the right preconditions before starting a dialogue
- Step 3: Identifying your stakeholders
- Step 4: Exploring the need, subject and purpose of the dialogue as well as relevant circumstances
- Step 5: Determining which stakeholders you want to engage with and how you will involve them
- Step 6: Determining which other parties you want/need to work with

### **Record tasks and roles within the organising team**

The organising core team is responsible for planning and executing the meeting. This team may consist of individuals collaborating from various stakeholder groups.

- Ensure there is a clear understanding of each member's interests; this helps foster mutual trust and prevent unrealistic expectations.
- Define clear and specific tasks and roles within the organising team. Continuously monitor these roles throughout the preparation phase and adjust them as needed, considering each member's skills and capabilities.
- For example, assign responsibilities for communicating with stakeholders, handling logistical preparations, creating the agenda and content, coordinating with facilitators, managing the budget.
- Assess whether the team collectively has the necessary knowledge and networks to organise the dialogue in the country concerned. If not, consider forming additional collaborations to gain the required expertise or manage local logistics effectively. For more information, refer to the [knowledge document](#) 'Who to partner up with?'

### **Develop and share a (draft) program**

- Create a draft program a few months before the dialogue and share it with stakeholders for their feedback.
- Ensure the multi-stakeholder dialogue is part of a multi-day program to facilitate joint knowledge development and relationship-building among participants.
- Gather participants' expectations beforehand and ensure that the program reflects the goals and motivations of all stakeholder groups. For example, ask participants 'What would make this dialogue successful for you?'
- Incorporate stakeholders' ideas and feedback into the final program. Use the finalised program as a foundation for further substance-related and logistical preparations, and continue to involve stakeholders in this process.
- Distribute the final program to all stakeholders about two to five weeks before the dialogue.

### **Prepare the program components in detail**

- If your program includes multiple components—such as field visits, training sessions, and dialogues—prepare each element individually, ensuring they are well-structured and have sufficient overlap.
- Assign a person to be responsible for each program component.

### **Define the structure and agenda of the multi-stakeholder dialogue**

- Decide whether hybrid participation (both in-person and virtual) is possible or necessary, and consider its implications for the dialogue's format. Ideally, all participants should meet in person to maintain equality and foster personal connections.
- Determine the duration of the dialogue. If needed, divide the dialogue into several sessions over multiple days to allow adequate time for the dialogue.
- Before finalising the agenda, compile a list of key elements and topics to be covered, such as presentations, brainstorming sessions, specific agreements, and discussions on particular topics.

- Ensure the format of the dialogue aligns with its content (e.g., using breakout groups for brainstorming and plenary sessions for decision-making).
- Ensure all stakeholder groups have a specific role in the dialogue to promote equality and participation among participants.
- Consider how decisions will be made during the dialogue.

### **Appoint and prepare facilitator(s)**

- Determine if one or multiple facilitators are needed. This may be useful especially if the dialogue is long, complex, or involves bridging gaps between diverse (groups of) stakeholders.
- Prepare a list of criteria for selecting facilitators.
- Draft a contract for the facilitator(s) and provide them with sufficient background information about the dialogue's context and the stakeholders' interests.
- Review the program and agenda with the facilitator(s) in detail and consider their input.
- Refer to the [knowledge document](#) 'What makes a good facilitator?' for more information.

### **Organise preparatory sessions before the dialogue**

- Facilitate preparatory sessions to ensure participants have a shared understanding of the facts. These could include training sessions, webinars, informal introductions, information sessions about the program and logistics, or (virtual) drop-in hours for questions.
- Inform participants about local cultural customs and etiquette, especially if they come from different countries. Use the [tool](#) 'Considering country-specific and cultural factors' for guidance.

### **Develop scenarios for potential challenges and uncertainties**

- Anticipate challenges that may arise during the dialogue, such as the last-minute absence of key stakeholders, unforeseen events, negative attitudes, or logistical difficulties.

- Discuss these potential scenarios with the facilitator(s) so they are prepared to handle them.

### **Make agreements about feedback and external communication**

- Decide who will be responsible for creating reports or other documentation for feedback after the dialogue.
- Define the desired outcomes of the dialogue and the steps needed to achieve them.
- Plan how to communicate about the dialogue externally and identify what materials are needed (e.g., photographs). Refer to the [tool](#) ‘When and how to share information?’ for guidelines.
- Determine in advance the timing and format for future meetings, so this can be proposed during the dialogue.

### **Final preparations**

- Make any last-minute substance-related changes to the agenda and ensure these are communicated to participants.
- Before starting the dialogue, review the content and flow one final time with the facilitator(s).
- Set agreements on the use of technology during the dialogue (e.g., presentations) and designate a person responsible for managing this.

## **Practical preparations**

### **Set a date**

- Consider practical factors such as local or religious holidays, travel time for stakeholders traveling long distances, climate conditions, and significant events (e.g., elections).
- Take into account the timing of the visit in relation to other ongoing developments, such as within a project, as part of a long-term strategy, or within a collaborative initiative.

### **Choose a location**

- Ensure the selected town/city and event venue are easily accessible for international, local, and regional stakeholders.
- If the dialogue pertains to a specific sector or supply chain, consider hosting it near relevant production locations to maintain a connection with the subject and allow for potential field visits.
- Verify that the venue can accommodate the expected number of participants and is suitable for the dialogue’s purpose. For instance, if the goal is to reach a multi-party agreement, select a neutral location. Dialogues involving workers are more effective when held near their workplace, provided it is safe.

### **Request provisional confirmation of participation**

- Ask participants if they intend to attend in person and what support they may need to participate (e.g., financial assistance, preferred date or location, input into the agenda).
- Compile a preliminary list of participants to aid in further logistical planning.

### **Prepare a budget**

- Develop a draft budget based on available funds, deciding how to allocate resources to maximise the dialogue’s effectiveness. Monitor expenses regularly.
- Typical costs include transportation, accommodation, catering, venue rental, external facilitator fees, visas, vaccinations, and unforeseen expenses.

- Clarify what financial contributions, if any, are expected from participants, noting that this may vary by stakeholder.
- Consider providing financial assistance for those whose participation may require it, such as covering transport or accommodation costs.

### **Arrange logistics**

- Book travel (flights or trains) for the organising team (and participants if needed), ensuring the team arrives in time for final preparations and a last program review.
- Arrange accommodation for the organising team (and participants if needed), ideally at the same hotel to minimise local transport and encourage informal interactions. Consider venues that offer both accommodation and event facilities.
- Organise local transportation between the airport or train station and the hotel for both the organising team and participants, if needed.
- Coordinate transportation to and from external sites, such as field visits, meetings, or training sessions not held at the hotel.
- Plan catering for the entire program, with options for external lunches and dinners to create an informal atmosphere. Meals can also be hosted by partner organisations involved in the dialogue.
- Collaborate with local partner organisations on logistics, as they have a better understanding of the local context.
- Prioritise sustainability in planning travel, accommodation, and catering, such as opting for train travel over flights and arranging group transport instead of individual options.

### **Request final confirmation of participation**

- Ask stakeholders to confirm their participation to finalise logistical arrangements, including hotel, venue, and catering bookings.
- Inquire about any dietary requirements and ensure they are accommodated.

### **Determine the language of communication and, if necessary, arrange translation services**

- Decide on the dialogue's primary language, typically English.
- Ensure all participants have adequate proficiency in English to contribute effectively. If not, arrange for translation services, such as an external interpreter or a bilingual participant. Note that this will require additional time during the dialogue.

### **Plan and communicate room setup**

- Choose a room setup that aligns with the dialogue format and can be arranged by the venue, such as circular, U-shaped, conference style, round tables, or a combination.
- Communicate the desired setup to the venue and specify additional requirements, such as a screen, microphone, flipcharts, markers, pens and paper, power outlets, and extension cords.

### **Facilitate group communication**

- Establish a communication channel (e.g., via WhatsApp) to enable quick communication with all participants regarding any changes during the dialogue.

### **Final preparations**

- Prepare thank-you gifts for the host organisation and participants, considering cultural customs.
- Print the agenda and participant list if they are not easily accessible online.
- Before the dialogue begins, check the room setup, ensure all necessary equipment is available, and verify that the venue is easy to find within the accommodation.
- Test technical elements such as audiovisual equipment and the internet connection to ensure they are functioning correctly.



## Information and support

This tool is part of a collection of tools, knowledge documents and training to help companies set up and implement a [meaningful dialogue](#) with their stakeholders. Meaningful stakeholder engagement is fundamental for (international) responsible business conduct and is reflected in [all steps of the due diligence process](#) according to OECD guidelines.

Click on a topic below for more information and support preparing and conducting a meaningful stakeholder dialogue.



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## Colophon

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