Tool

Meaningful stakeholder dialogue

Checklist multi-stakeholder dialogue meeting

SER

SOCIAL AND ECONOMIC COUNCIL

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 various aspects, both substance-related and practical, for organising a multi-stakeholder dialogue meeting – whether it is physical, hybrid or online.

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

Consider involving external parties as co-organisers or speakers

- ☐ determine – together with management – whether to organise, present, facilitate or translate (such as an interpreter) the dialogue (or part of it) in collaboration with other companies, organisations or individuals; see also the knowledge documents 'Who to partner up with?' and 'What makes a good facilitator?'
- ☐ schedule a time to prepare for the meeting
- ☐ ensure that roles and responsibilities are well-coordinated and that everyone is aware of each other's contributions

Develop a draft program and discuss with (senior) management and other internal stakeholders

- ☐ align the purpose and format of the meeting with the internal stakeholders involved, and discuss the roles and contributions you expect from them
- ☐ request management to kick off the dialogue meeting to demonstrate their support
- ☐ consider the topics you would like to discuss, keeping in mind that dialogue takes time, especially if an interpreter is involved; limit the number of topics as much as possible (see additional explanation in the box on the next page)
- ☐ minimise the time spent sending or presenting information; focus on facilitating an exchange
- ☐ tailor the content (questions/themes) to the background and expertise of your stakeholders; ensure stakeholders can provide input individually or in groups, as lack of engagement or a need to bring everyone to the same knowledge level can hinder participation

Additional explanation

Be selective with your program and limit the number of topics or themes you want to explore. In practice, time often runs out for meaningful exchanges that allow for diverse perspectives or disciplines to build on each other's ideas. Participants need time to warm up and align on the question or task at hand. With a diverse group of stakeholders, each person brings a different background and perspective on sustainability, which requires time to understand each other's language and establish a common ground for dialogue. This is particularly true when stakeholders come from different cultural backgrounds and speak different native languages. However, a bit of time pressure can sometimes help drive focus and reach the core of the dialogue more quickly.

Additionally, ensure the conversation topics are sufficiently focused to prevent any single topic from becoming too broad and monopolising the dialogue, leaving little time for other important conversations. Undefined topics can also lead to varying expectations among participants, which can hinder productive dialogue.

Send invitations to stakeholders in a timely manner (8 to 12 weeks in advance)

☐ clearly specify the intended recipients of the invitation and limit the number of participants from each organisation; set a deadline for responses
☐ if appropriate, send the invitation on behalf of the CEO or management to increase buy-in
☐ actively solicit stakeholders' ideas for the meeting, either through a survey, questions in the invitation, or brief calls. For example, ask: "What do you expect from the dialogue?", "Which topics or aspects would make the meeting meaningful for you as a stakeholder?" or "What would you like to highlight?". This approach encourages a more active attitude and preparation from stakeholders. It also allows you to incorporate input from stakeholders who may not be able to attend. Additionally, ask stakeholders if any parties are missing from the dialogue who should be included.

Document the final program

☐ develop a final list of participants based on registrations/cancellations
☐ incorporate input and feedback from stakeholders into the program and agenda
☐ prepare a PowerPoint presentation to guide the meeting, explicitly stating the conversation rules
☐ review the program and presentation with relevant internal and external co-organisers
☐ share the final agenda with stakeholders no later than 2 weeks before the meeting

Select dialogue format

☐ decide whether to have a plenary discussion (with all participants together) or split into smaller groups (see additional explanation in the box below); this can be done physically or online
☐ if opting for group discussions, decide whether all groups will discuss the same topics simultaneously or address different topics
☐ consider using a carousel/world café format, where groups rotate through different questions, allowing each group to provide input on every question

Additional explanation

Plenary group discussions are valuable as they provide participants with a comprehensive view of the broader landscape. These sessions allow everyone to hear what others think about a particular topic. On the other hand, small group discussions offer everyone the chance to contribute, leading to more in-depth insights.

Grouping

- ☐ ensure that internal and external stakeholders are mixed within groups to facilitate mutual knowledge exchange and relationship building
- ☐ be mindful that one stakeholder should not inhibit another's ability to contribute openly, such as in purchasing-supplier relationships where power dynamics exist; this can be mitigated by working in groups
- ☐ allow stakeholders to switch groups if they feel uncomfortable speaking out due to power dynamics or limited knowledge/expertise
- ☐ be prepared for last-minute cancellations
- ☐ if the above points are not relevant, you may allow the grouping to proceed organically

Make agreements about feedback to stakeholders and external communication

- ☐ discuss internally how you plan to provide feedback to stakeholders after the meeting
- ☐ consider and discuss internally how and what you want to communicate externally to generate positive attention for your company

Practical preparations

First, decide whether the meeting will be held exclusively in-person, in a hybrid format, or entirely online. If you want to engage stakeholders who cannot attend in person, such as international participants, consider opting for a hybrid or online format. However, keep in mind that in online meetings, body language is harder to interpret, and in hybrid meetings, it can be more challenging for online participants to actively engage in the dialogue. Therefore, it is advisable to appoint someone to monitor the online environment (reactions, questions) and actively involve online participants in the conversation. Ideally, the meeting should be held entirely in person or entirely online, as a hybrid setting can sometimes create a divide among participants, with online participants engaging in the chat function while in-person attendees converse during breaks. In any case, it is crucial to establish clear guidelines for participation at the start of the meeting.

Below are preparation guidelines for both in-person and online meetings. If you choose a hybrid format, it is recommended to review both checklists.

In-person meeting

Set a date

- ☐ consider the timing of the meeting in relation to other stakeholder interactions and developments related to the topic – such as what the results will be used for and whether there is a deadline (e.g., for policy or strategy). Also, factor in specific situations for stakeholders, such as public holidays, school breaks, or typical working days in the country where the dialogue takes place

Set a time

- ☐ develop a logical schedule based on the program outline
- ☐ decide whether mutual exchanges are desired and whether breakfast, lunch, or drinks are most suitable for creating the right atmosphere
- ☐ account for stakeholders' travel time and peak traffic hours

Set a location

- ☐ choose a neutral location if necessary
- ☐ ensure the venue is easily accessible by car and public transport, with sufficient parking and clear directions if it is hard to find
- ☐ instruct reception staff to greet and direct participants, and to prepare visitor badges in advance
- ☐ book required rooms well in advance and ensure they are available before the meeting begins
- ☐ provide sufficient toilet facilities, beverages, and, if needed, catering for (vegetarian/vegan) meals; be sure to ask stakeholders about dietary requirements

Arrange the right setup/workshop space

- ☐ ensure spaces are well-lit
- ☐ vary the setup (e.g., sitting, standing, changing physical space and dialogue format) to energise participants and encourage active engagement
- ☐ provide comfortable chairs that still promote an active posture
- ☐ choose between a theatre-style setup – ideal for presentations and plenary discussions – or a circular setup where everyone is on equal footing, promoting dialogue
- ☐ keep groups physically close, especially if time is limited and you want to maintain control over the process

Determine meeting language

- ☐ consider the languages spoken by stakeholders
- ☐ arrange for an interpreter (who may also be a meeting participant) or use translation apps if a stakeholder only speaks their native language

Choose an appropriate method for recording information, in line with how you want to provide feedback afterwards

- ☐ decide who will take notes internally or arrange for a minute-taker; when recording input, note the source so you can follow up later
- ☐ ensure you have a way to store, save, or photograph the recorded information
- ☐ print necessary materials, and arrange for flipcharts, whiteboards, sticky notes, and writing materials
- ☐ set up online tools, like Mentimeter or Miro, clearly and attractively; this also supports a paperless meeting

Arrange name cards

- ☐ for external stakeholders, include their name and organisation, and for internal stakeholders, list at least their name and department; this fosters networking and exchange – avoid listing positions, as it can create a hierarchical effect and inhibit openness
- ☐ use name cards to divide groups, for example, by using bright colours

Arrange a personal thank you (for all participants or only participants with a special role)

- ☐ take into account the topic of the meeting and preferably sustainable, such as responsible refreshments instead of physical items

Arrange a photographer

- ☐ obtain prior permission from stakeholders if you plan to use photos

Make practical preparations well in advance (participants may arrive (a lot) earlier than the start time)

☐ setting up rooms
☐ preparing slides on screen
☐ checking technology
☐ name cards
☐ lunch setup

Online meeting

Set a date

☐ consider the timing of the meeting in relation to other stakeholder interactions and developments related to the topic – such as what the results will be used for and whether there is a deadline (e.g., for policy or strategy). Also, factor in specific situations for stakeholders, such as public holidays, school breaks, or typical working days in the country where the dialogue takes place

Set a time

☐ develop a logical schedule based on the program outline
☐ consider potential time differences
☐ if possible, limit the meeting duration to a maximum of 2 hours to maintain participants' attention

Select online platform

☐ select an online platform that meets your technical and security needs as well as those of the stakeholders; commonly used apps include Zoom and Teams
☐ verify in advance that stakeholders have access to and are familiar with the app(s)
☐ vary the setup (e.g., sitting, standing, changing the online environment and dialogue format) to energise participants and encourage active engagement
☐ configure your online environment in advance, setting up desired features (e.g., enabling/disabling the chat function, assigning participants to breakout rooms)
☐ establish online conversation rules for providing input (e.g., using the chat function, raising hands, unmuting microphones) and make the use of cameras mandatory if possible, to foster more personal contact

Determine meeting language

☐ consider the languages spoken by stakeholders
☐ arrange for an interpreter (who may also be a meeting participant) or use translation apps if a stakeholder only speaks their native language

Choose an appropriate method for recording information, in line with how you want to provide feedback afterwards

☐ record the online meeting after obtaining participants' permission.
☐ if necessary, decide who will take notes internally or arrange for a minute-taker; when recording input, note the source so you can follow up later
☐ ensure you can save or take screenshots of the recorded information
☐ set up online tools, like Mentimeter or Miro, clearly and attractively

Clarify the name and organisation of participants

☐ allow online participants to visibly add their name and organisation; avoid listing positions, as it can create a hierarchical effect and inhibit openness

Arrange a personal thank you

☐ decide whether it is desirable and possible to thank participants in person
☐ consider a sustainable gesture, such as planting a tree for each participant

Arrange facilities

☐ schedule sufficient breaks for participants to grab a drink, have a snack, or take a bathroom break; breaks are essential for maintaining energy levels during an online dialogue

Have practical preparations ready well in advance

☐ checking the technology (camera, sound)
☐ sharing your screen
☐ preparing rooms
☐ ensuring that participants check the technology in good time before the start and/or provide technical support in a timely manner

Examples

Below are some examples of dialogue meetings that have been organised in the Netherlands (in Dutch):

- Clothing and textile sector:
  Multi-stakeholder dialogue on developing an IRBC strategy
- Food sector:
  Multi-stakeholder dialogue in the Netherlands about IRBC risks
- Royal Ahrend:
  Meaningful stakeholder dialogue for double materiality assessment

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.

- Website
- Self-assessment
- Tools
- Knowledge documents
- Training
- Guidelines & legislation
- FAQs
- Theory

Colophon

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