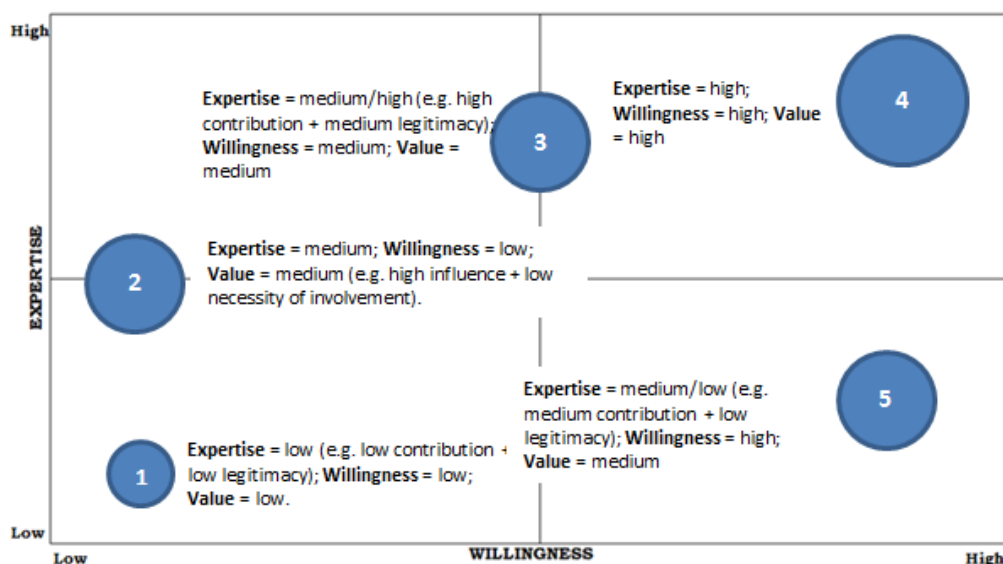# THE EXPERTISE-WILLINGNESS-VALUE APPROACH TO STAKEHOLDER ANALYSIS AND MAPPING [OPTIONAL TOOL]

INTRODUCTION

The expertise-willingness-value approach to stakeholder analysis and mapping is an alternative to more common **power-interest approach** where individual stakeholders are evaluated and then prioritised in terms of their potential contribution and legitimacy [expertise], willingness to engage [willingness] and influence and necessity of involvement [value] in relation to a given project or activity. Such evaluations can be used to create a visual map of the relative standing of individual stakeholders and to guide the development and implementation of an appropriate engagement plan (see Figure 1).

Figure 1: a worked example of a simple expertise-willingness-value stakeholder map

This optional guide has been develop to support you to identify, analyse and prioritise (map) potential ASCS and PSS SACE stakeholders using the expertise-willingness-value approach, and should be used in conjunction with the **MAX PLANNING GUIDE**.

STEP BY STEP GUIDE

Potential ASCS and PSS SACE stakeholders, both within and beyond your organisation, can be analysed and prioritised using the expertise-willingness-value approach using the following steps:

STEP 1: IDENTIFY STAKEHOLDERS

Identify potential ASCS and PSS SACE stakeholders by consulting with senior colleagues within your organisation (e.g. the senior management team) [recommended strategy] or, when this is not possible, by conducting a desk-based document review.

STEP 2: ANALYSE STAKEHOLDERS

List the potential ASCS and PSS SACE stakeholders you identified during the previous step in the first column of the analysis tool provided in Appendix 1. Then, for each stakeholder, assign a stakeholder category (e.g. consumer, administrators etc.), if required, and evaluate and rate them as 'high', 'medium' or 'low' on the following criteria.

Criteria	Description
Expertise	
Contribution	The information, counsel and/or expertise that the stakeholder could bring to the project

Legitimacy	The validity of the stakeholder's claim for inclusion in the project (i.e. is the engagement justified)
Willingness	
Willingness to engage	The degree to which the stakeholder is willing (or unwilling) to engage with the project
Value	
Influence	The potential power of the stakeholder over the project (note: this influence can be positive or negative)
Necessity of involvement	The extent to which the success of the project is dependent on the involvement of the stakeholder

Add your ratings to the third, fourth and fifth columns of the analysis tool provided in Appendix 1, along with a supporting explanation. A worked example is included in the first row for guidance.

	The information provided in this tool was drawn from *BSR's Five-Step Approach to Stakeholder Engagement*, available for download at http://www.bsr.org/en/our-insights/report-view/bsrs-five-step-approach-to-stakeholder-engagement

STEP 3: MAP STAKEHOLDERS

Using your completed stakeholders analysis list (Appendix 1), locate each individual stakeholder (represented as a circle) on the mapping grid provided in Appendix 2 as follows:
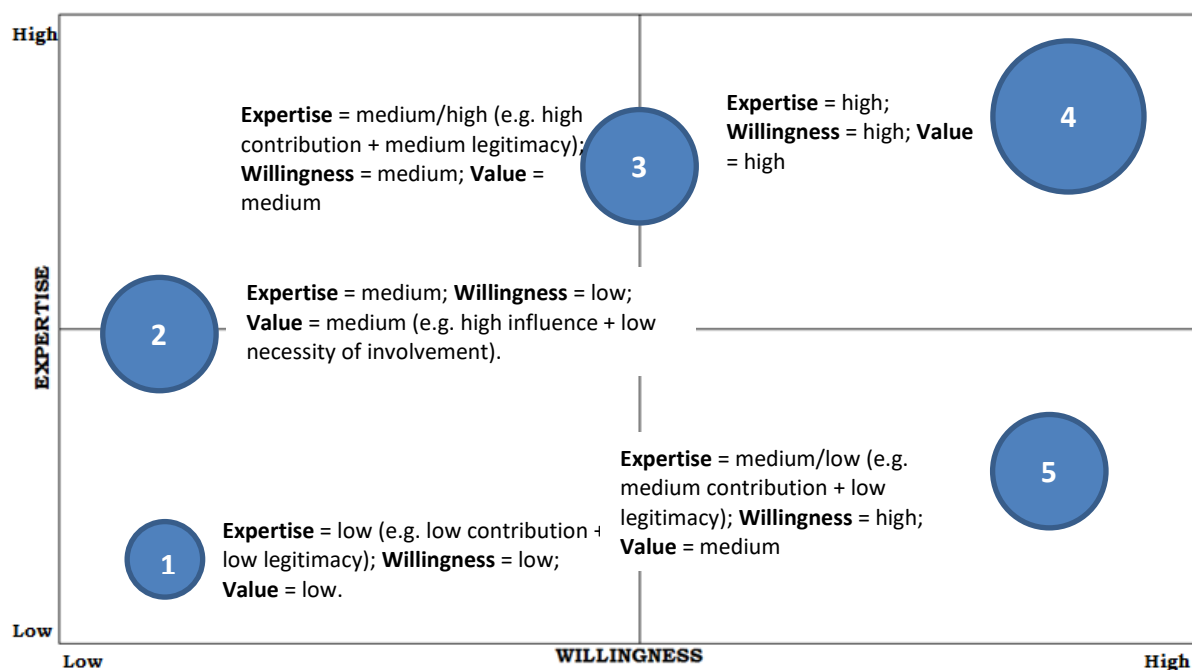
Criteria	Description	Grid
Value *	Combined rating of a stakeholder's potential influence or power over the project and the necessity of their involvement.	**Size of circle:** select and copy appropriate circle [small-low value; large – high value] then amend text to denote stakeholder number on analysis chart or name, if preferred

Expertise *	Combined rating of a stakeholder's potential contribution and legitimacy.	**Y axis:** locate circle on the vertical (Y) axis [the higher the rating of expertise, the higher the circle is plotted on the Y axis]
Willingness	Degree to which a stakeholder is willing or unwilling to engage.	**X axis:** move circle along the horizontal (X) axis [the higher the rating of willingness, the further to the right the circle is plotted on the X axis]

* See Dealing with mixed ratings

Dealing with mixed ratings: some stakeholders may have a mixed rating – in other words, different ratings scores for two aspects of the same criteria (e.g. value or expertise). If the mixed rating relates to value (e.g. high influence + low necessity of involvement) you will need to use a medium sized circle to represent the stakeholder [see SH2 in Figure 1]. If, on the other hand, the mixed rating relates to expertise (e.g. high contribution + medium legitimacy) you will need to locate the stakeholder circle between the appropriate dissecting lines of the grid [see SH3 and SH5 in Figure 1].

Figure 1: a worked example of a simple expertise-willingness-value stakeholder map (repeated for ease of reference)

High

Expertise = medium/high (e.g. high contribution + medium legitimacy); **Willingness** = medium; **Value** = medium

3

Expertise = high; **Willingness** = high; **Value** = high

4

EXPERTISE

Expertise = medium; **Willingness** = low; **Value** = medium (e.g. high influence + low necessity of involvement).

2

Expertise = medium/low (e.g. medium contribution + low legitimacy); **Willingness** = high; **Value** = medium

5

Expertise = low (e.g. low contribution + low legitimacy); **Willingness** = low; **Value** = low.

1

Low

Low

WILLINGNESS

High

Stakeholder circles are provided in Appendix 2 and can be copied and dragged to the appropriate place in the grid. Remember to label each circle with a stakeholder reference.

OPTIONAL STEP: ADD FURTHER INFORMATION

You can draw lines of influence between key stakeholders (see Figure 2 below) and/or can change the colour of the circles to denote potential impact (e.g. red for blockers and critics, green for advocates and supporters, and orange or blue for neutral).

Figure 2: a worked example of an expertise-willingness-value stakeholder map including lines of influence
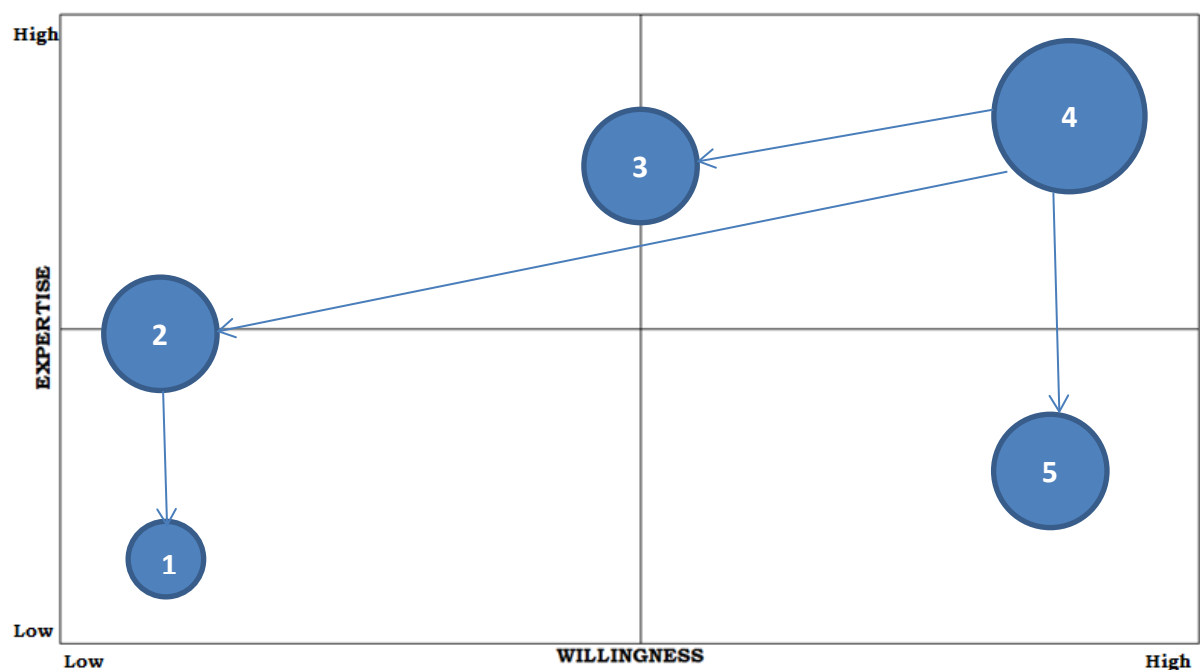
The relative standing of stakeholders and the relationships between them may change over time so remember to periodically review and amend your map.

The information provided in this tool was drawn from *BSR's Five-Step Approach to Stakeholder Engagement*, available for download at http://www.bsr.org/en/our-insights/report-view/bsrs-five-step-approach-to-stakeholder-engagement

USING YOUR STAKEHOLDER MAP TO PLAN AN APPROPRIATE ENGAGEMENT STRATEGY

You can now use your visual map of the potential ASCS and PSS SACE stakeholders to guide the development and implementation of an appropriate engagement plan. As outlined in Figure 3 below, most of your engagement efforts should be focussed on your key players and potential champions (i.e. the stakeholders located in the top right grid).

The information provided in this guide was drawn from www.mindtools.com and www.stakeholdermap.com, both of which include a range of useful tips and tools.

DISCLAIMER

The MAX toolkit and website are based on independent research commissioned and funded by the NIHR Policy Research Programme (Maximising the value of survey data in adult social care (MAX) project and the MAX toolkit implementation and impact project). The views expressed on the website and in publications are those of the author(s) and not necessarily

those of the NHS, the NIHR, the Department of Health and Social Care or its arm's length bodies or other government departments.

APPENDIX 1: STAKEHOLDER ANALYSIS TOOL [POWER-INTEREST APPROACH]

Stakeholder [SH]		Expertise	Willingness	Value
Name	SH Type*			
David Smith	C	*Contribution* = high *Legitimacy* = medium *Overall rating - medium high*	*Supportive of surveys but has limited time to engage*	*Influence* = high *Necessity of involvement* = low as other C's can represent him *Overall rating = medium*

* [A] administrators [C] consumer of survey data [E] experts [G]

APPENDIX 2: STAKEHOLDER MAPPING TOOL [EXPERTISE-WILLINGNESS-VALUE APPROACH]

A 2×2 matrix with vertical axis labeled EXPERTISE (Low to High) and horizontal axis labeled WILLINGNESS (Low to High).

x x x