



Conflict and Negotiation

Clarita Beach

In one of the previous lessons we talked about “difficult” people. In this lesson, you will participate in a simulation exercise to learn how to negotiate with multiple stakeholders who may have competing interests in your Rare Pride campaign.

By the end of this lesson you will be able to:

- Practice applying Block's concept of allies and adversaries in a negotiation situation.
- Create a negotiation plan.
- Apply conflict management and negotiation techniques in a simulation that mirrors potential conflict at their site.
- Demonstrate negotiation skills in your Pride campaign.
- Explain the role of negotiation in a Pride campaign.

Activity, Introducing Clarita Beach

Instructor Procedure

Step 1

Prepare the Activity

1. *This activity is the introduction to conflict and negotiation and the Clarita Beach simulation.*
2. *Deliver this presentation and conduct this review activity no fewer than three days prior to running the Clarita Beach simulation.*

Step 2

Conduct the Activity

Classroom simulations of actual negotiations are used to teach the skills needed by good negotiators. While situations described in this session may never occur, it is better to have practiced and prepared for every eventuality. Your role as the Pride Program Manager is to properly facilitate the role play and debrief it afterwards. While the simulation is actually going on, you have a largely hands-off role. The roles are written so that the meetings should be largely participant-driven. In fact, the proper use of timing between and among the various community meetings is one of the key skills that participants can use to sway the role play in their favor.

The case is purposely designed to be complex. In some instances, all the time allotted for the simulation may have run out without students having reached a concrete agreement. This is OK. Many negotiations do in fact end in no deals, and this fact will be discussed when the case is debriefed.

What follows are a series of activities and instructions on how to facilitate the case before and during the actual classroom date.

This activity is the introduction to a series of four activities which are designed to be done sequentially. We recommended you offer them in the following order:

- *Block Analysis of Allies and Adversaries, Basics*
- *Block Analysis of Allies and Adversaries in Clarita Beach*
- *Negotiation Plan*
- *Clarita Beach Simulation*

1. *Divide students into two groups. Based on the average Rare class size of twelve, the exercise is designed to be run with two groups. If all twelve participants are present, each group is designed to have five roles and one observer. If all six participants are not present, the observer should be dropped and used to fill the missing role. If a different number of participants is in a particular section of the class, the group sizes should be adjusted as close to the five-member ideal as possible.*
2. *Handout to each participant the General Information on Clarita Beach and the descriptions around the meeting attendees.*
3. *Assign each campaign manager a role to play from the list below. These roles should be used throughout the remaining activities and to prepare for the simulation.*
 - A. *Sam Transleau, Pride campaign manager*
 - B. *Brett Samuels, fishermen's representative*
 - C. *Jayne Cobb, Clarita Beach mayor*
 - D. *Alex Crane, federal parks ranger*
 - E. *Dana Marcs, teacher*
 - F. *Observer*
4. *Observers should only receive the General Information, and not the descriptions of the meeting attendees. This will be important later on during the actual simulation.*

Step 3

Debrief the Activity

- *Explain to participants that over the last few weeks with several issues surfacing about the Pride campaign, Sam and the mayor have scheduled a series of meetings to see if these issues of concern can be productively addressed. The meetings will be held in three days, and the series of activities to follow will help prepare for their role play.*

Participant Procedure

Step 1

Purpose

To introduce the Clarita Beach simulation.

30 minutes

Step 2

Participate in the Activity

1. *Divide into groups as directed by your instructor.*
2. *In small groups, read the background information and description of the attendees.*

Background on the Clarita Beach Simulation Handout

Clarita Beach is a small coastal community far from the national capital. Due to this distance, the residents of Clarita Beach have grown accustomed to living their lives without outside interference. Local politicians dominate politics and the federal government does not infringe on the lives of Claritans, as the locals are known. The major economic activity of the community is fishing. Fishing is traditionally a male occupation, but the female population contributes to the activity by mending nets and preparing fish for sale and consumption.

Off the coast of Clarita Beach is Mikela Island. 10 years ago, Mikela Island was declared a national park by the federal government. When it became a national park, the government sent a federal parks ranger to Mikela Island to oversee the park and enforce the government's regulations. In time, the ranger came to assume more unofficial duties representing the government since he is the only federal employee this far from the capital.

Mikela Island National Park's boundaries extend 0.5 kilometers off the island's beaches. This extension was enacted mainly to protect the Cradil, a fish endemic to this part of the country. Although the Cradil does live in areas besides Mikela Island, nowhere else has the same high concentration of Cradil. The Cradil is a good eating fish and has served as Clarita Beach's main trade item with the rest of the country. Through the sale of Cradil, Clarita Beach is able to buy most of the manufactured products the community needs to support its lifestyle.

Although the ocean around Mikela Island was declared a protected area ten years ago, the ranger has not enforced any meaningful restrictions. As such, the fishermen of Clarita Beach have continued to harvest the Cradil and trade it with the rest of the country.

Pride Campaign

Sam Transleau works for the Mikela Island Conservation Authority (MICA), a small group of organized conservationists dedicated to preserving the flora and fauna of Mikela Island. MICA has no formal affiliation with Mikela Island National Park or the Parks Service. Transleau was not raised in Clarita Beach, but is originally from a nearby village. Working together with Rare, Transleau is the campaign manager of a Pride campaign.

The campaign is in the second month of the implementation phase. After completing the Concept Model and threat prioritization with the help of stakeholders, Transleau selected the Cradil as the main target and has proceeded with a campaign designed to save the Cradil

from being fished out of existence. Although everyone in Clarita Beach seemed to be on board with the Project Plan after the last stakeholder meeting, many groups have begun to express their concerns with the campaign now that actual campaign activities are imminent. Local fisherman, fearing the threat to their economic livelihood, among other parties, have made it known that they are no longer fully behind the campaign.

Transleau is seeking to launch a campaign activity during the implementation phase, an extended research project for high school students from the local school. Students will record Cradil levels off the coast of Mikela Island for the next two years. Upon learning that Transleau is planning a trip to Mikela Island with local students, several groups from Clarita Beach have come forward and voiced their concerns. In response to these concerns, Transleau decided to hold an emergency community concerns meeting. Following are those who will be in attendance.

Meeting Attendees

Sam Transleau, Pride campaign manager

Transleau, of the Mikela Island Conservation Authority, completed the second university phase of Rare course work a month or two ago. After all of the weeks of planning, the Pride campaign has begun to garner attention within the community. Transleau called the emergency community concerns meeting that is about to begin. The proposed school project is Transleau's first big event and Transleau is committed to its success.

Brett Samuels, fishermen's representative

Rather than have most of the village attend the meeting, local fishers have sent Samuels, one of the eldest members of the community, to represent their interests at the community concerns meeting. Samuels has made no secret that the fishers are chiefly concerned with protecting the village's unrestricted access to Cradil off Mikela Island. Samuels has stated that he may not allow his family's children, and by extension, the other fishers' children, to attend the project on Mikela Island.

Jayne Cobb, Clarita Beach mayor

Cobb, as mayor of Clarita Beach, is the most prominent political force in Claritans' lives. Cobb likes to have a hand in everything that happens in Clarita Beach and the Pride campaign is one of the biggest things to happen in years. Cobb faces re-election in six months.

Alex Crane, federal parks ranger

Crane has served as the parks ranger of Mikela Island for the last five years. In addition, Crane handles the correspondence, limited as it may be, between the federal government and Clarita Beach. Upon assuming office, Crane continued the policies of his predecessor. Specifically, although Crane knows it to be illegal, Crane has tolerated fishing in the protected areas around Mikela Island. Crane's feelings on the Pride campaign are not yet known, although Crane's permission will be necessary if an organized project is to be held on the island.

Dana Marcs, teacher

Marcs teaches a combined class of ninth and tenth graders at Clarita Beach High School. Marcs was initially very excited about the prospect of a field trip to Mikela Island and feels it will be a great educational experience for the students. Marcs can teach the research project in the school curriculum and have the final say on any proposed field trips.

Activity, Block Analysis of Allies and Adversaries, Basics

Instructor Procedure

Step 1

Prepare the Activity

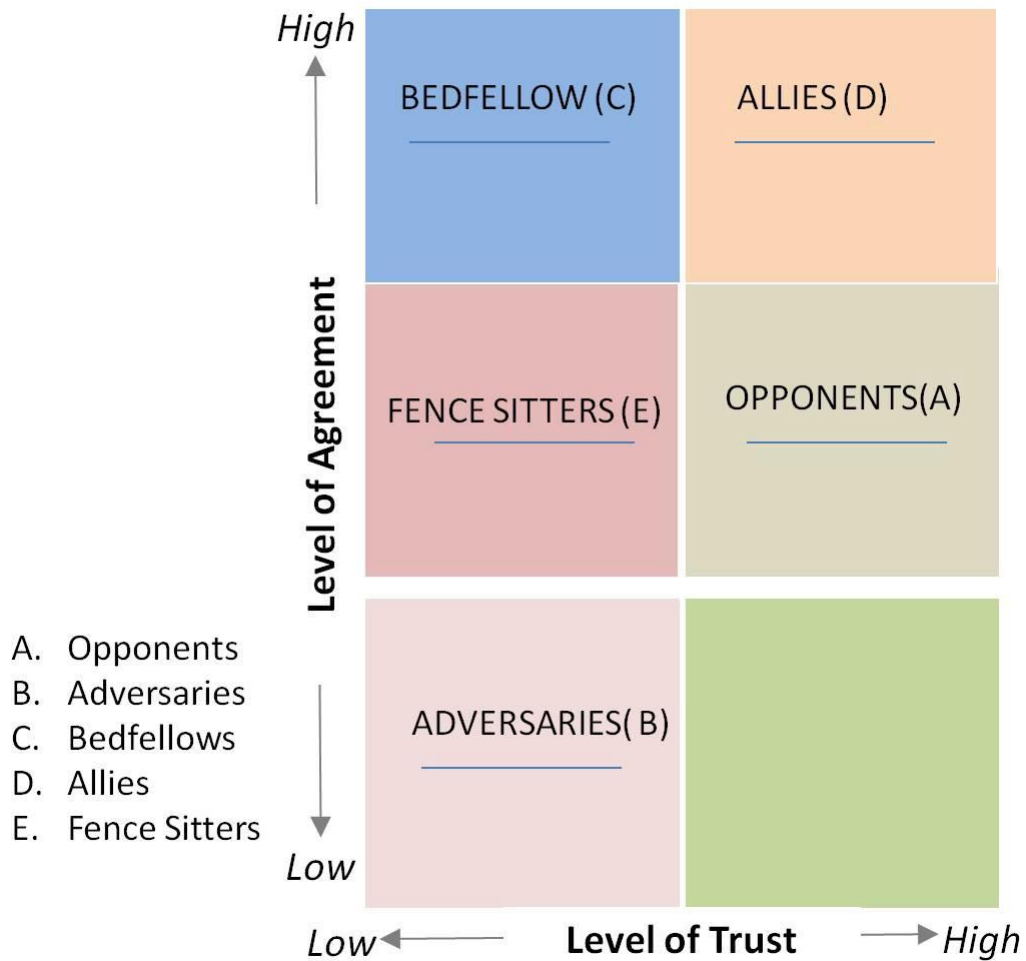
- *This activity is one of four activities which are designed to be done sequentially. We recommended you offer them in the following order*
 - a. *Block Analysis of Allies and Adversaries, Basics*
 - b. *Block Analysis of Allies and Adversaries in Clarita Beach*
 - c. *Negotiation Plan*
 - d. *Clarita Beach Simulation*
- *These three activities as a group are complex, so be sure you understand the flow and purpose of each part. If you are teaching this for the first or even second time, practice each of the activities and ask for coaching from more experienced colleagues.*
- *You can run this activity as an individual, small group or group activity. You might also want to assign it as homework. The directions below are for individuals, but some suggest alternatives are*
 - a. *Prepare a large Block Analysis Matrix before the lesson and print out each description on a sheet of paper that will fit into the matrix you have drawn. Have the class determine which description goes in which location on the matrix. You can do the same with the strategies, that is, have them read a strategy and discuss where it belongs as a large group.*
 - b. *Conduct it as a homework and simply have people follow the existing directions, without the small group discussion. Conduct a group debrief the next morning.*
- *Remember, small group activities allow quieter people to participate, large group activities can provide energy to more extraverted people.*

Step 2

Conduct the Activity

1. Review the purpose of the activity with the participants and explain why it is important for them to anticipate stakeholders' negotiating positions. Explain that the Block Analysis of Allies and Adversaries is a tool that might help them think through their relationships with stakeholders.
2. Review the directions with the participants.
3. Give participants about five minutes to determine which type goes where in the Matrix.
4. Review their answers, quickly clarifying the types with examples, but do not talk about strategies yet. (5 min).
5. Give them about 10 minutes to determine which strategy might go with which type. Have them do this in pairs if the energy is getting low.

Block Trust Agreement Matrix



Step 3

Debrief the Activity

- *Construct a quick ORID discussion, but keep it brief. Possible questions are suggested below*
 - a. *What about this activity and material surprised you, jumped out at you?*
 - b. *How did you feel when you read the descriptions of allies, adversaries, fence sitters, etc.? What positive responses, what negative?*
 - c. *How has this matrix concept influenced your understanding of negotiation?*
 - d. *We will ask you to use this matrix once more in the upcoming Clarita Beach simulation, but quickly let us know if you think you can use this tool in your own work.*

Participant Procedure

Step 1

Purpose

To practice applying the concept of allies and adversaries in negotiation situations.

Anticipating stakeholders' negotiating positions helps you use your time with them efficiently and effectively. The Block Analysis tool can help campaign managers anticipate and then strategize about different stakeholders positions.

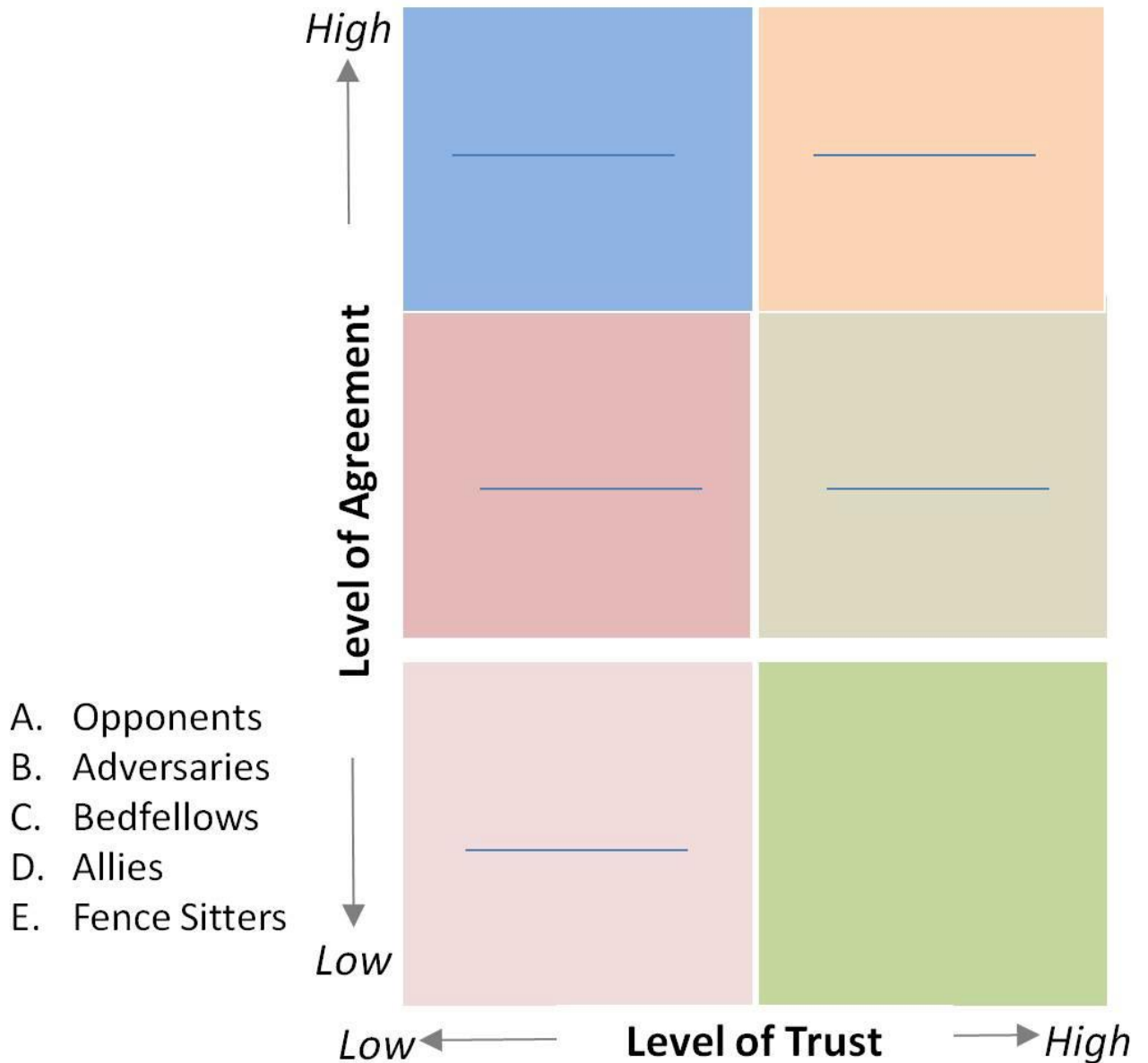
20 minutes (10 for matrix, 10 for discussion about strategies)

Step 2

Participate in the Activity

1. Read the description of each type of person below and place the associated letter into the matrix.

Block Trust Agreement Matrix



Allies and Adversaries

Peter Block¹ identifies stakeholders according to the degree of trust that is shared with you. He describes allies, who share your goals and intentions, adversaries, who oppose your interests, as well as opponents, bedfellows, and fence sitters. These types are described in the chart below. Above is Block's Matrix, which demonstrates the degree of agreement (vertical from high to low) and the degree of trust (horizontal from low to high) that you have with stakeholders.

¹ P. Block, "Building coalitions," Harvard Business Review (1987).

Opponents	<p>Your opponents, those with whom you have high trust but hold different positions and/or opinions, are also an important resource for your campaign. They may have information or insight that is important for you to understand. They may be able to help you see the situation differently.</p> <p>It is possible that your view is limited. Your opponents challenge you to do your best work and thinking, to be certain that what you think and propose is not based on faulty assumptions or information. And, because there is high trust and respect, you can probably engage in productive problem solving with them. They do not wish you harm.</p>
Adversaries	<p>Peter Block's last category is adversary. Generally someone does not start out as an adversary. A relationship has to develop into one of low trust (and low agreement) after your attempts to build trust and find agreement, common positions and ways to work together have failed. Adversaries are the black hole of emotional energy. They consume it and us. Peter Block's advice is to "let go," meaning to let go of the effort to persuade them to be different or to undermine or hurt them. The goal of letting go is to reduce the tension and threat that exists in the relationship.</p>
Bedfellows	<p>Bedfellows have the same position and/or objectives as you do, but you do not trust each other. You don't have a strong relationship built on trust but you are in agreement on what needs to be done. Bedfellows can help bring their colleagues and coalitions into your campaign, helping you develop support, momentum and strength. But it can be hard to work with them because of the lack of trust. And if the relationship really sours, they can become a competitor to you and offer an alternative source to the community.</p>
Allies	<p>An ally is a person or group with whom you have high trust and high agreement about the situation, issue and needs. Because there is trust, you often share ideas, information and even, perhaps, resources. You may invite them to your organization's strategic planning session because they offer a helpful perspective and won't use the information against you. They are like a part of your organization, at least in the areas where you work together.</p>
Fence Sitters	<p>Fence sitters are those with whom you have moderate trust and moderate agreement. They like a lot of information and are reluctant to take a position until they are ready, which may take a long time since they tend to be risk-averse. They are generally friendly and willing to listen, which makes them more fun to be with than people in some of the other categories. It is tempting to devote a lot of time to getting fence sitters on your side of the fence. This energy and effort is usually not well-rewarded. Be cordial and provide information, but don't spend a lot of time trying to move them. They won't hurt you, but you could easily invest more than you will get out of the relationship. Your time could be spent in more productive ways.</p>

2. In small groups of two or three, compare answers and discuss any differences or questions.
3. In a full group determine if all came to the same conclusion.

4. Read the Strategies for Block Classifications below. Match the description's letter with the type of person (allies, fence sitter, etc.)

Opponent _____	A. After reaffirming your agreement on the issues and your level of trust, you should speak about the threats and vulnerabilities you both foresee. Your allies may have more or different information about other parties than you do. Make sure to share information with them when it will further your joint causes. Most of your time should not be spent dealing with your allies but should be spent working with parties in other roles as there is more to be accomplished.
Advisory _____	B. Opponents represent the best chance for you to act collaboratively and create value. Because of your shared trust, opponents will be willing to sit down with you and frankly discuss the options. Although your positions may not currently match up, it is likely that there is a third option that is acceptable to both parties waiting to be discovered. Spend a lot of time working with your opponents; that time will be constructive and may be the best chance you have of creating a great deal.
Bedfellow _____	C. Bedfellows are the most dangerous group you will encounter. Because of the obvious agreement on positions, you may be tempted to treat them as allies, but bedfellows are fundamentally different. Just as focusing on the underlying interests that led to positions allowed for successful resolution in Ugli Orange, your agreement on a position with a bedfellow may be driven by different, incompatible interests. One option to deal with bedfellows is to build trust, but this is a time-consuming process that you may not be able to afford. More often, you will only reaffirm your agreement with a bedfellow while remaining aware that any alliance is tentative.
Allies _____	D. Fence sitters are another group (along with opponents) where time can be well spent. Because they are likely to be undecided (or at least not to hold a strong position) on the issue, you may be able to convince fence sitters of your side's merits. However, be aware that even a convinced fence sitter moves into the bedfellow category with all the problems associated with that group.
Fence Sitter _____	E. Make your position well known to your adversaries in order to eliminate any ambiguities, i.e., disagreement may be based on bad information. Beyond that, it is most often not worth your time to focus on the relationship with your adversaries. Not only do you disagree with these parties, but your lack of trust precludes any constructive discussion. Your time is better spent focusing on other groups.

Strategies for Block Classifications

Although thinking about your relationship with other people is helpful in its own right because it forces you to think about the problems you will face, the real value in completing a Block Analysis lies in being able to anticipate the proper way to deal with each of the categories. Following are some general hints on the best way to go about interacting with the characters in the simulation as well as the people you will encounter in your campaign, based on their Block classification.

Allies (High Agreement, High Trust)

After reaffirming your agreement on the issues and your level of trust, you should speak about the threats and vulnerabilities you both foresee. Your allies may have more or different information about other parties than you do. Make sure to share information with them when it will further your joint causes. Most of your time should not be spent dealing with your allies but should be spent working with parties in other roles as there is more to be accomplished.

Opponents (High Trust, Low Agreement)

Opponents represent the best chance for you to act collaboratively and create value. Because of your shared trust, opponents will be willing to sit down with you and frankly discuss the options. Although your positions may not currently match up, it is likely that there is a third option that is acceptable to both parties waiting to be discovered. Spend a lot of time working with your opponents; that time will be constructive and may be the best chance you have of creating a great deal.

Bedfellows (High Agreement, Low Trust)

Bedfellows are the most dangerous group you will encounter. Because of the obvious agreement on positions, you may be tempted to treat them as allies, but bedfellows are fundamentally different. Just as focusing on the underlying interests that led to positions allowed for successful resolution in Ugli Orange, your agreement on a position with a bedfellow may be driven by different, incompatible interests. One option to deal with bedfellows is to build trust, but this is a time-consuming process that you may not be able to afford. More often, you will only reaffirm your agreement with a bedfellow while remaining aware that any alliance is tentative.

Fence Sitters (Low Trust, Unknown Agreement)

Fence sitters are another group (along with opponents) where time can be well spent. Because they are likely to be undecided (or at least not to hold a strong position) on the issue, you may be able to convince fence sitters of your side's merits. However, be aware that even a convinced fence sitter moves into the bedfellow category with all the problems associated with that group.

Adversaries (Low Trust, Low Agreement)

Make your position well known to your adversaries in order to eliminate any ambiguities, i.e., disagreement may be based on bad information. Beyond that, it is most often not worth your time to focus on the relationship with your adversaries. Not only do you disagree with

these parties, but your lack of trust precludes any constructive discussion. Your time is better spent focusing on other groups.

Activity, Block Analysis of Allies and Adversaries in Clarita Beach

Instructor Procedure

Step 1

Prepare the Activity

1. *This activity is one of four activities which are designed to be done sequentially. We recommended you offer them in the following order*
 - a. *Block Analysis of Allies and Adversaries, Basics*
 - b. *Block Analysis of Allies and Adversaries in Clarita Beach*
 - c. *Negotiation Plan*
 - d. *Clarita Beach Simulation*
2. *The four of these activities together are complex, so be sure you understand the flow and purpose of each part. If you are teaching this for the first or even second time, practice each of the activities and ask for coaching from more experienced colleagues.*
3. *This activity should be run as an individual activity. You might want to assign it as homework.*

Step 2

Conduct the Activity

1. *Prepare on flip chart paper Pride campaign manager Sam Transleau's description. See below.*

Sam Transleau, of the Mikela Island Conservation Authority, completed the second university phase of Rare course work a month or two ago. After all of the weeks of planning, the Pride campaign has begun to garner attention within the community. Transleau called the emergency community concerns meeting that is about to begin. The proposed school project is Transleau's first big event and Transleau is committed to its success.

2. *Instruct participants, that for the purpose of this exercise everyone should assume they are the campaign manager, Sam Transleau.*

3. *After they have entered the names of the other participants from Clarita Beach into the Block Trust Agreement Matrix, instruct them to reread the Background and General Information on the simulation.*
4. *Once they have reread the information, ask them to determine if they should make any adjustments to their matrix. For each character they will write a one-line explanation on the matrix of why they classified that role as they did.*
5. *Encourage discussion and dialogue.*

Step 3

Debrief the Activity

- *This activity allows each person to practice determining what the possible relationships of the participants are to the campaign manager. When they do the actual simulation, they may or may not be the campaign manager. If they are the campaign manager, they have an idea of what their level of agreement and trust is with each character.*

Participant Procedure

Step 1

Purpose

To give you the opportunity to practice applying Block's Allies and Adversaries concept to a situation similar to what you might face.

1 hour

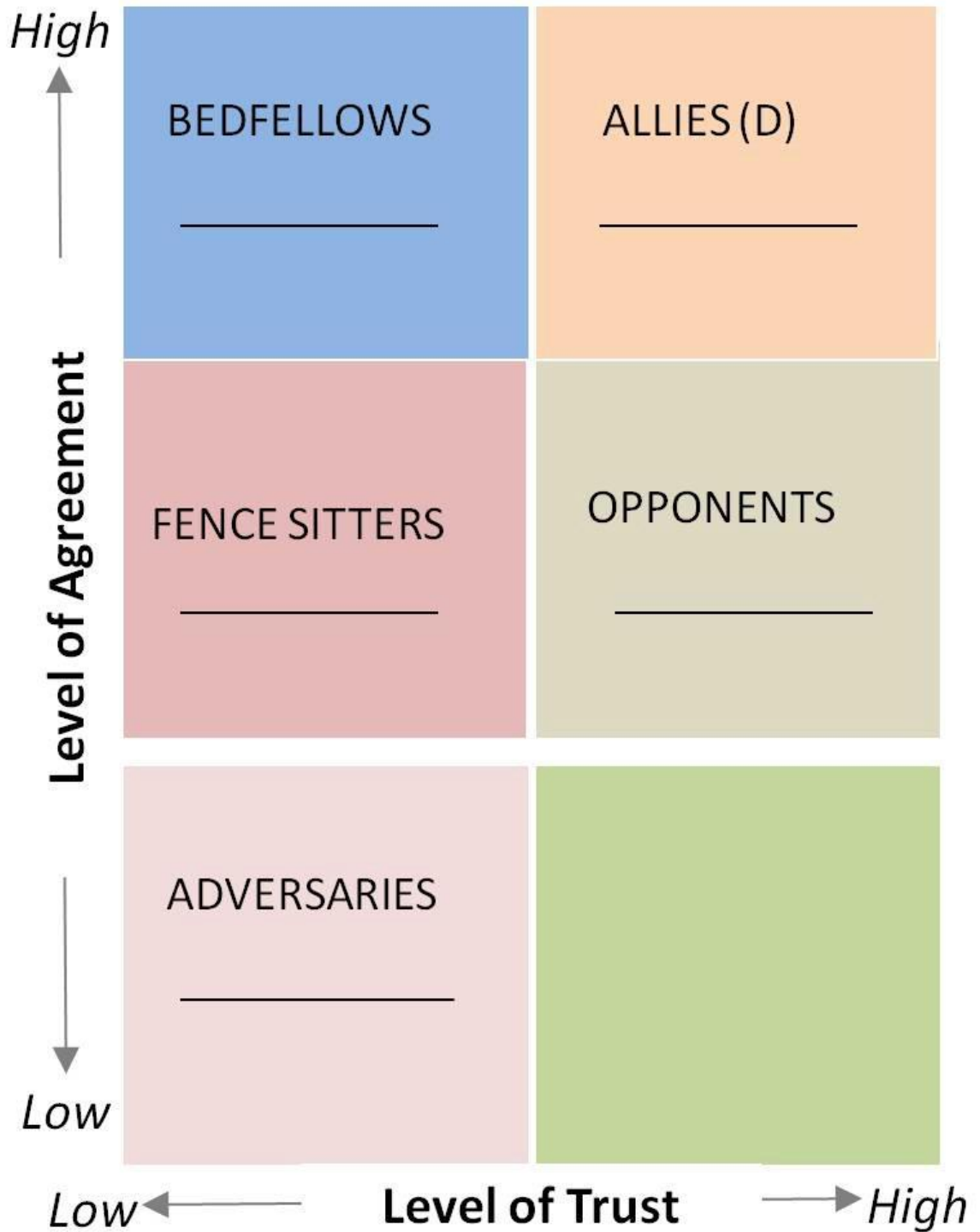
Step 2

Participate in the Activity

1. *Read the list of Clarita Beach meeting attendees below.*
 - *Sam Transleau, Pride campaign manager*
 - *Brett Samuels, fishermen's representative*
 - *Jayne Cobb, Clarita Beach mayor*
 - *Alex Crane, federal parks ranger*
 - *Dana Marcs, teacher*
2. *Assume you are the campaign manager, Sam Transleau.*

3. Using the Block Trust Agreement Matrix below , write each person's name into the box you think best shows the level of trust and agreement between you and that individual.

Block Trust Agreement Matrix



4. Now reread the Background for Clarita Beach received in the introduction.
5. Return to your names in the Block Analysis Matrix and decide if you need to move any of the names into a different category based upon the background presented.
6. For each character, write a one-line explanation on the matrix of why you classified that role as you did.
7. Discuss your Matrix with others in the class.

Activity, Negotiation Plan for Clarita Beach

Instructor Procedure

Step 1

Prepare the Activity

1. *This activity is one of four activities which are designed to be done sequentially.*

We recommended you offer them in the following order:

- a. *Block Analysis of Allies and Adversaries, Basics*
 - b. *Block Analysis of Allies and Adversaries in Clarita Beach*
 - c. *Negotiation Plan*
 - d. *Clarita Beach Simulation*
2. *Before beginning, become familiar with negotiating terms described in the reader.*

Step 2

Conduct the Activity

1. *Explain why a negotiation plan is important to campaign managers.*
 - a. *The negotiation plan, presented at the end of this lesson, is quite flexible and can be used to help you prepare for a whole variety of different conflict situations.*
 - b. *Activities like this one can really put campaign managers in a position of strength and confidence when meeting with other parties.*
 - c. *The negotiation plan will help campaign managers prepare for the actual simulation.*
2. *Have participants (everyone but observers) fill out the negotiation plan according to the role you assigned them in the initial activity.*
3. *Based on the background information and descriptions on the meeting attendees introducing, they should have some expectations about what they will be up against in the simulation.*

Step 3

Debrief the Activity

- Preparation is one of the keys to becoming an effective negotiator.
- Participants should bring their negotiation plan with them to the actual meeting so it can serve as a tool and a reference there.

Participant Procedure

Step 1

Purpose

To give you the opportunity to practice creating a negotiation plan.

60 minutes

Step 2

Participate in the Activity

Up until now, you may have been thinking about negotiation as a series of one-on-one relationships: How does another party relate to you? As you prepare this negotiation plan, you are going to move to a more collective approach.

When you are interacting with other parties, at least some of the time will be spent with multiple other parties present, and you must use tactics to only reveal information that will further your goals with all parties. Therefore, when filling out this negotiation plan, keep all parties in mind and only use strategies and tactics that further your goals with respect to all parties.

1. Read the Negotiation Terms found below.
2. Complete the Negotiation Plan according to the role assigned to you in an earlier activity. In the plan, "Self" refers to you and the role you will play in the simulation, while "Other" represents all other roles in the Clarita Beach simulation.
3. Once completed, bring your Negotiation Plan with you to the simulation, so it can serve as a tool and a reference.
4. When filling out this Negotiation Plan, keep all parties in mind based upon the meeting attendees and general background information provided in the previous exercise. Only use strategies and tactics that further your goals with respect to all parties.

Negotiation Terms Handout

In order to help you to fill out the Negotiation Plan, below are the definitions of terms you will need to know:

Interests

Interests are the underlying motivators for people to act the way they do in negotiation. Interests cause people to assume positions that they then try and reinforce. Remember to focus on these interests and not the positions that result from them because conflicting positions are often based on compatible interests. In a multi-party situation like Clarita Beach, different parties will have different interests. Make sure to name the party that holds a given interest so you don't get confused when using the Negotiation Plan.

Best Alternative to a Negotiated Agreement (BATNA)

The BATNA describes what you will do in the event that no deal can be reached. For a simple example, think of buying a new car. In the event that you cannot bargain with the dealership to an acceptably low price, you may conclude that the best alternative is to continue driving your old car. The BATNA is the main source of power in many negotiations and the best way to improve your bargaining position is to improve your BATNA. To continue with our car example, you may have found the car you want at another dealer for an acceptable price but would still like to pay less at this dealer.

If you cannot bargain to reduce the price with the current dealer, your BATNA is to buy the car at the other dealer. If you could bargain the other dealer even lower, your position at the current dealer would be that much stronger. In some situations, you may need to be creative to improve your BATNA or to even find one. There is always a BATNA, though, even if it is to walk away from the situation entirely (and thus not a very good one).

Assumptions

You can have assumptions both about the information you know and the information you do not know. For example, you may know that you have exactly \$20,000 available to buy a car and you may assume that no other interested buyer has more money available. Or, you can assume something you don't really know about, like another party's interests or positions. Either way, assumptions help to create a negotiating platform and get things started. Of course, these assumptions might be wrong, so it is important to design questions that can be used to test those assumptions when actually meeting with other parties.

Strategy

Strategy refers to one of the five conflict styles adapted from the work of Thomas Kilmann that we will touch on in the lesson, "Communication Strategies, Thomas Kilmore Styles of Conflict." The different strategies are Compromise, Avoidance, Competition, Accommodation and Collaboration. You should try to employ collaboration whenever possible but there are some situations where it is not appropriate. If you have good information that the collaborative style will not be the most effective, you should plan on using one of the other four.

Tactics

Tactics differ from strategy because they are specific techniques you can employ to help you achieve your goals. We have not had time to touch on many tactics, but a few examples include proposing mutually acceptable alternatives or making an appeal to

authority by claiming you cannot do something because your higher ups won't allow you to. If you can think of some specific techniques that will help, put them here.

Opening Proposal

This proposal, although you may never actually use it in the negotiation, gets you thinking about your ideal outcomes to the issues associated with individual interests. It is unlikely that you will ever get everything you want in a negotiation, but you need to know what you want. In addition, research shows that people who offer opening proposals that are grossly in their favor tend to anchor negotiations towards their end of the bargaining round and end up doing better.

Accreditation of Proposal

In addition to focusing purely on interests and positions, people want to know why you hold your positions. Being able to back up your position, especially with objective standards, helps to legitimize your position. This helps you to think about your underlying interests as well.

Concessions

It helps you to know what is easiest to give up in negotiation. Some interests are always going to be lower priority than others. You must know what you value most and what you value least. This is especially effective when you think that something you value little is highly valued by the other parties.

Closing the Deal

Closely related to your BATNA, this step requires you to think about what a successful resolution of the negotiation looks like: What must be in a package for you to take it?

Measuring the Utility

This is an often overlooked but critically important tool. There are ways to measure the total utility, or value, you take away from a deal. For instance, you can assign point values to your various interests based on their priorities. It is also helpful if you can approximate the utility of the deal for the other party or parties so that you can attempt to measure the total utility of the deal and see if value was created. The best deals truly are win-win.

Negotiation Plan Worksheet

Interests and Priorities

Self	Other
•	•
•	•
•	•
•	•

Best Alternative to a Negotiated Agreement (Fall-back Position)

Self	Other
------	-------

Assumptions

What assumptions are you making about the other parties' interests and priorities? What questions can you ask to test the validity of your assumptions?

Assumptions	Questions to Test Assumptions
•	•
•	•
•	•
•	•

Strategy, Tactics

Overall Strategy:

Tactics to support strategy:

-
-

Opening Position

What will be your opening position? Why?

-

Accreditation of Proposal

How will you legitimize your proposal?

-

Concessions

What concessions are you willing to make?

-

Closing the Deal

What is needed to tie down the deal?

-

Measuring the Utility

How will you measure the utility/value of the deal?

-

Setting

Activity, Clarita Beach Simulation

Instructor Procedure

Step 1

Prepare the Activity

1. *Ensure that the simulation takes place at least three days after it was initially introduced.*
2. *Recommend that the simulation be conducted by two senior Pride Program Managers, so each group can be monitored.*
3. *This activity is one of four activities which are designed to be done sequentially.*

We recommended you offer them in the following order:

- a. *Block Analysis of Allies and Adversaries, Basics*
 - b. *Block Analysis of Allies and Adversaries in Clarita Beach*
 - c. *Negotiation Plan*
 - d. *Clarita Beach Simulation*
4. *Whenever possible, the flow of the simulation should be driven by the students. However, it is your job to keep students on task and make sure that they move from meeting to meeting, as well as answer any questions about the intent of the General Information or Roles.*
 5. *An important point to make to participants is that the degree of learning in a simulation is directly proportional to the degree to which students look out for their own interests. Especially because the conservation population is self-selecting, students will have a tendency to support conservation goals and be overly cooperative. However, in role they must look out for their character's interests first.*

6. Prepare the Shocks and Rumors cards provided in the worksheet resource, which you will distribute according to the "Format of the Community Concerns Meetings" during the simulation. The shocks and rumors should come as a complete surprise to students and should be kept secret until the moment they are meant to be revealed in the schedule.

Shocks and Rumors I

Confidential Handout for Campaign Manager Transleau	Sam Transleau: The Pride campaign has begun to attract some national interest. A national conservancy, unaffiliated with MICA or Rare, has expressed interest in supporting your project with the high schoolers. They have offered you \$1000 to help fund the project and related expenses, no strings attached.
Confidential Handout for Mayor Marcs	Dana Marcs: Due to rising costs and a low initial estimate, the supplies for the extended project will cost significantly more than originally estimated. The new figure is \$1,600. This means that even more money will have to be found to fund the event. If the project can be funded this year, you are certain that the regional authority will fully fund associated costs in future years.
Confidential Handout for Ranger Crane	Alex Crane: You have just finished a book about the devastating effects of overfishing on the other side of the continent. You wonder if the Cradil might become the next species lost to unsustainable practices.
Confidential Handout for Representative Samuels	Brett Samuels: A few weeks ago, you asked all the fishers you represent to provide the number of the Cradil they have caught in the last couple months. It was the worst season in memory — fishers in the town caught only 80 percent of the Cradil they did in the corresponding period last year. This confirms your own suspicions.
Confidential Handout for Mayor Cobb	Jayne Cobb: You have had some of your staff in the town doing some polling of the townspeople. It turns out that Transleau's Pride campaign is even less popular among the average voter than you originally feared. Unless the people invited to the stakeholder meeting are overwhelmingly in favor of the campaign, you should not immediately lend your support to it.

Shocks and Rumors II

General Handout to be Distributed to all Roles	You have just learned, via public announcement, that Parks Ranger Alex Crane has been appointed a position in the Capital City. As of yet, no one has been named as Crane's replacement. The absence of a Parks Ranger on Mikela Island for the foreseeable future means that the government does not need to give its permission for the
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Following the Second Informal Meeting Time

project to go ahead. Crane will be allowed to determine how his discretionary spending is allocated even after he leaves.

7. The entire case is designed to take about two hours, including reasonable time for switches between meetings and reacting to new information. However, as conditions dictate, the time of each session of the simulation can be adjusted.
8. Identify two separate spaces, one for each group for the simulation. Set up the space with flip chart paper and markers.

Step 2

Conduct the Activity

1. An important point to make to participants, before dividing them into their groups, is that the degree of learning in a simulation is directly proportional to the degree to which students look out for their own interests. Especially because the conservation population is self-selecting, students will have a tendency to support conservation goals and be overly cooperative. However, in role playing activities, they must look out for their characters' interests first. This point is in their instructions, but should be made explicit as a reminder before students begin the simulation.
2. Review the Plan for the Community Concerns Meetings with the participants.
3. Divide the cohort into the groups assigned in the initial introduction activity.
4. Meet with the designated observer, appointed previously in the initial activity. As the other participants in the simulation are starting on the simulation, you should meet with the observers to clarify their role in the activity.
5. Observers are meant to play the part of the "fly on the wall." Observers should not visibly react to the negotiation unfolding around them because they may inadvertently give clues as to how parties should act. Observers should take notes on what the particular group they are observing did including the tone of the conversation, what character or characters took a leading role in the activity, any tactics they saw being used and what barriers to agreement arose. Observers can be tapped for their unique viewpoint at the beginning of the debrief. As you will see on the list of suggested questions at the end of these instructions, observers' point of views can serve as a great starting point for debrief of the activity.

Step 3

Conduct the Simulation

- **First Informal Meeting Time:** Before the official Community Concerns meeting begins, the parties have agreed to gather informally to exchange ideas. Parties are encouraged to discuss issues privately between two people or in small groups. You should use this time to gather information about the other parties' concerns. 25 minutes
- **First Community Concerns Meeting:** The parties have agreed to hold two official Community Concerns meetings. This first meeting will enable all parties to become formally acquainted with each other and begin to propose solutions to competing problems. 30 minutes.
- **Shocks and Rumors I:** Immediately after the First Community Concerns Meeting, hand out the first round of shocks and rumors. Students receive their private information via the distribution of handouts labeled with their individual role and "Shocks and Rumors 1."
- **Second Informal Meeting Time:** This block of time between the two Community Concerns meetings will allow parties to talk with people with similar interests and devise a strategy for the second meeting. 30 minutes
- **Shocks and Rumors II:** This round of shocks and rumors is made up of public information. Immediately following the Second Informal Meeting, each group should get one copy of the shared Shocks and Rumors II sheet.
- **Second Community Concerns Meeting:** Agreement can be reached at this Community Concerns meeting. All parties wishing to support the field trip should sign a Memorandum of Understanding describing, as specifically as possible, the details of the field trip. 30 minutes.

Step 4

Debrief the Activity

- Simulations like Clarita Beach are used by negotiation professors to teach the negotiation skills that must be experienced to be truly learned. All the above lessons are drawn from the conflict it is anticipated that participants will go through while completing the simulation. Clarita Beach is designed to present some situations that will be similar to situations campaign managers are likely to encounter while actually conducting their Pride campaign. Whether they are in planning or implementation, they will have to manage a diverse set of parties and conflicts. The important thing to remember is that the skills developed in the negotiation lessons are truly cross functional. These skills are broad enough that they should help in any situation in which campaign managers must rely on other people for something. As might be expected, most situations in the Pride campaign will involve this skill set. In fact, these cross-functional negotiation skills should support most endeavors for the rest of life.

- *After the simulation is completed, each group should put their Memorandum of Understanding on a flip chart page and post on the Sticky Wall or wall for comparison. If a group did not reach agreement, that is OK. It will be addressed in the debrief. Students should be given a break, then move into the debrief.*

Participant Procedure

Step 1

Purpose

Apply conflict management and negotiation techniques in a simulation that mirrors potential conflict at your site.

120 minutes

Step 2

Participate in the Activity

1. *Review the Plan for the Community Concerns Meetings with your instructor.*
2. *Divide into your groups, as indicated by your instructor and participate in the simulation according to the role assigned to you in the initial activity.*

The Plan for the Community Concerns Meetings

The First Informal Meeting

Before the official community concerns meeting begins, the parties have agreed to gather informally to exchange ideas. Parties are encouraged to discuss issues privately between two people or in small groups. You will use this time to gather information about the other parties' concerns. You have agreed that you will take 25 minutes for this meeting.

The First Community Concerns Meeting

The parties have agreed to hold two official Community Concerns meetings. This first meeting will enable all parties to become formally acquainted with each other and begin to propose solutions to competing problems. You have agreed that you will take 30 minutes for this meeting.

The Second Informal Meeting

This block of time between the two Community Concerns meetings will allow parties to talk with people with similar interests and devise a strategy for the second meeting. You have agreed that you will take 30 minutes for this meeting.

The Second Community Concerns Meeting

You are hoping that agreement can be reached at this Community Concerns meeting. All parties wishing to support the school project should sign a contract describing, as specifically as possible, the details of the project as it will be implemented. You have agreed to take 30 minutes for this meeting.

At the close of this second community concerns meeting, a contract should be physically signed by all parties. At a minimum, this contract must honor agreements reached on the following provisions.

- whether the project will be started
- the starting date of the project
- which parties will commit what funds to the successful completion of the project
- a description of any extra publicity the project will attract

The contract should also list any additional provisions agreed to by all signatories to the contract.

Your team should write your contract on a piece of flip chart paper and be prepared to present it to the whole group.

Activity, Debrief With Handout, Clarita Beach Simulation

Instructor Procedure

Step 1

Prepare the Debrief

1. *This part of the lesson is the debrief and should not be taught until after the simulation has been completed.*
2. *Following the end of the simulation, a representative from each group should put the group's MoU on the board. Once all students have completed the exercise and have had a break, you should proceed with the debrief found here.*
3. *In all likelihood, the contracts agreed to by each group will have significant differences. This fact underscores an important lesson. Clearly, in any negotiation situation, we are restrained by the facts of the case—with a given set of circumstances there is only so much even the best negotiator can do. However, given the same facts, skilled negotiators will generally achieve superior results.*
4. *Prepare enough copies of the Clarita Beach Key Lessons (one for each participant).*

Step 2

Conduct the Activity

1. *Handout to the class, the Clarita Beach Key Lessons.*
2. *Present the series of PowerPoint slides are the "Clarita Beach Results and Reviews".*

Step 3

Debrief the Simulation

You should not feel required to address all these questions in a debrief of Clarita Beach. Many of these points were touched on in the presentation just completed. If any of the topics below seemed to be especially relevant to the simulation you just put on, you should discuss those topics.

1. What is a coalition?

Two or more parties who agree to cooperate to:

- a. achieve some mutually desirable goal and
- b. make an explicit agreement about the division of the reward.

2. When do coalitions form?

When parties do not have sufficient resources individually to control an outcome affecting them, but a combination of their resources can potentially control the outcome.

3. How long did it take you to discern that it would be advantageous for various parties to work together or form a coalition? How did you come to this realization?

In the First Informal Meeting, many students are relatively passive. Naïve negotiators are often reluctant to provide too much information because they assume other people have interests that are opposite of their own. They may sense that there is substantial information asymmetry, but they do not know whom to trust to get the information they need. In this case, as information is gleaned from initial proposals, the parties become more aware of possible shared interests.

4. What was the role of the private conferences/informal meetings?

How did they influence the final outcomes? Where were most of the coalition-forming activities carried out (private conferences, formal meetings)? What were the benefits of using the private conferences to build a coalition?

In the first private conferences, the first conversations to occur are usually between the teacher and campaign manager roles as well as among the fisher's representative, mayor and federal ranger. These are the most natural coalitions based on their overall interests at the beginning of the exercise. The private conferences allow individuals to make personal connections. The simple act of agreeing to speak may signal interpersonal trust upon which additional commitments may build.

Most students find that private conferences are far more productive than the larger meetings. In the private conferences they are able to confirm assumptions about common interests. In addition to the substance of the conversations, they may hold symbolic significance. Tentative agreements and entry into a coalition may be a catalyst for the formation of in-group/out-group identification. Actually articulating possible contracts, however, is usually completed in the larger group because it is easier to move towards agreement when all parties are able to object to proposals and articulate their interests simultaneously.

5. How do coalitions gain strength or become more powerful?

A coalition can gain strength by making the value of joining clear to other parties. A coalition can also become stronger and/or more attractive by making it obvious to other parties the costs of not joining. A coalition may become stronger as members build interpersonal relationships that go beyond the issues being addressed. By inviting parties to join the coalition based on their reputation for keeping commitments, the group can increase its trust, unity and strength.

6. How can a party discourage coalition formation?

Negotiate with each group separately and achieve agreement on their own top priority. Take advantage of strategic differences between members to weaken the coalition.

Shocks and Rumors (changing social dynamics)

7. How did relationships change over the course of the negotiation?

The process of revealing interests is dynamic—as each party reveals interests, the sum total of information available at the table increases. As knowledge increases over the course of negotiations, a negotiator's situational understanding grows. As situational understanding becomes refined, the negotiator's understanding of his or her interests, and of the interests of the other parties, as well as the overlap or divergence of these interests increases.

8. What is the impact of the updated or new information?

Information matters. New information can change the utility of certain relationships, potentially fracturing or strengthening alliances and/or creating new alliance opportunities.

9. Did changing priorities (e.g., the mayor's and the parks ranger's) affect tactics?

The shifting interests and interrelationships may stir emotional shifts in the participants, just as a business negotiator's emotions may swing during real-life, complex negotiations. But Clarita Beach also allows participants to see that swings of emotion can be managed effectively. The exercise's structure provides the participants with multiple breaks to help the negotiator adjust thinking, manage emotions and refine tactics.

10. Did any groups have an early deal or near-deal that was derailed by the introduction of new information?

Some students may mention that the "shocks and rumors" changed their opinions about the alliances they had previously formed. Businesses (including non-profit) relationships are often based on what you know of another party (e.g., reputation, prior experiences). When new information is uncovered, relationships can change as a result. Relationships that are based on honest and open communication are more likely to survive the shock of newly acquired information. If the new information is a surprise based on what you know of the other party, it seems likely that a strong relationship will make you question the new information rather than assuming the worst of the other party. Interpersonal trust, thus, becomes a valuable asset.

Updating Plans (revising mental models)

11. Did you revise your negotiation plan based on the new information?

The formal negotiation plans that students prepare prove to be a solid starting point, but also turn out to be insufficient to achieve a successful agreement. As additional data is introduced, the students need to adjust preconceived notions, schema and plans. They also need to update their understanding of both the deal and the interests at hand. They must adapt their negotiating strategies accordingly. The shifting social context matters. Priorities, preferences and interests of the parties change. This shifting context becomes a real force in the direction of subsequent negotiations, and the students must regroup and adapt accordingly. This adaptation of schema becomes a highlight of the case.

12. How does this case mirror the reality of most negotiations?

We believe that it is critical that students learn to incorporate new information effectively into negotiation planning. In this case, the new information provided update the characters about developments that have come to light while the negotiator was busy negotiating. Public sentiment may shift, new money may become available and rumors may dominate public discourse even as the parties are doing their best to keep the actual negotiations confidential.

13. Did you feel you had enough time to tease out interests at the full group meetings? Private conferences? How you deal with the time pressures created by limited meeting time?

As is often the case, some students wish for more time in the formal sessions. However, on the basis of our experience, we believe that the recommended time limits provide sufficient time. Plus, using the informal meeting time well is an important lesson to learn. The breaks are critical to this exercise. The students may have a strong emotional reaction to the drastic changes, but they are given time to process the information and plan how to adapt. The break reduces the tension of the shock. The students are quietly taught a helpful tactic. When facts change, it can be helpful to take a break to cool down emotionally or to adjust strategy.

14. Closing Reflection on the Simulation

- a. *As we close out the Clarita Beach case study and simulation, focus for a moment on your key learnings about conflict management and negotiations. Where do you see similarities between this simulation and the situation at your site?*
- b. *What unfolded in the simulation that surprised you? How did this surprise affect how you approached the negotiations?*
- c. *Where did you find your self most stretched? How did you respond to being stretched?*
- d. *Which of the ideas and skills that we have been talking about are you most excited about trying out at home?*
- e. *What are some ah-ha's you have had about your personal approach to conflict management and negotiations that will guide what you will do as you deal with the conflict situations you will most likely encounter at your site?*
- f. *What is one thing that you will do differently when you return home?*

Clarita Beach Key Lessons

Results

- Even with the exact same set of facts (as in a controlled situation like Clarita Beach), results differ based on the skills and personalities of the negotiators.
- The object behind any negotiation is to get the best possible results for yourself regardless of the specific set of facts; the metric may change depending on the situation. (If the relationship is more important, the dollar value you accept may change, but there are still outcomes that are better than others.)
- In some situations (for example, when the final deal is less than your BATNA or you have been treated by a negotiator lacking integrity), "no deal" is truly the best situation and you should walk away from the table.

BATNA

- Best Alternative to a Negotiated Agreement
- A source of power because it allows you to walk away from the table at a higher point and therefore reasonably demand more from the other party.
- The most effective way to improve your bargaining position is to enhance your BATNA by finding new and better alternatives to the deal at hand.

Expect the Unexpected

- Negotiations and conflict management sessions take place over time.

- As time passes, the conditions that form the context and setting of the negotiation can change; these changes will have a material effect on the priorities and the interests of the parties.
- When new, relevant information becomes available, you should stop and plan, touch base with coalition partners and spend some time looking for other relevant information.

Coalitions

- Multi-party situations oftentimes make it beneficial to join a coalition.
- Coalitions generally form around shared interests.
- Groups of individuals generally have more power than individuals working alone; the interests you are drawing attention to will get more attention.
- You may have to make concessions to form a working coalition.
- Managing coalition partners is oftentimes the most challenging aspect of conflict management; many former campaign managers report managing the relationship with Rare's community partner to be the most difficult task of the entire campaign.
- The key to managing allies is to build trust.

Trust

- People trust other people who act with integrity (in reliable and predictable ways).
- Sharing information is an important method for building trust, but people tend to trust people willing to share an amount of information similar to the amount they are comfortable with; you can risk the health of a coalition relationship by not sharing enough information or by sharing too much.
- Any act of dishonesty quickly erodes trust, which takes a long time to build back.

The Zero-Sum Myth

- Very few negotiations are zero-sum situations. Value can be created in most situations.
- In order to avoid succumbing to the zero-sum fallacy, spend the time to discover all interests.
- Even parties with different positions can have largely or totally compatible interests.
- Compatible interests should be used as a platform to build trust with opponents.
- Effectively expanding the pie requires that you take the time and approach problems with an open mind in order to be creative.

In the Campaign: Simulations like Clarita Beach are used by negotiation professors to teach the negotiation skills that must be experienced to be truly learned. All the above lessons are drawn from the conflict it is anticipated that you will go through while completing the simulation. Clarita Beach is designed to present some situations that will be similar to

situations you are likely to encounter while actually conducting your Pride campaign. Whether you are in planning or implementation, you will have to manage a diverse set of parties and conflicts. The important thing to remember is that the skills developed in the negotiation lessons you had in this lesson are truly cross-functional. These skills are broad enough that they should help in any situation in which you must rely on other people for something. As you might expect, most situations you encounter in the Pride campaign will involve this skill set. In fact, these cross-functional negotiation skills should support most of your endeavors for the rest of your life.

Summary

We have almost reached the end of the first university phase. Although the Clarita Beach simulation is set in implementation and not planning, the skills taught in the simulation are useful in all stages of the Pride campaign. During the planning phase, which you are about to begin, the stakeholder meetings will require all the conflict management skills learned through the past few weeks. In fact, these skills are meant to be broad so that you can use them in the rest of your professional and personal lives. Do not look for situations that resemble Clarita Beach, but focus on the skills you have learned while participating in the lesson with your colleagues.