ASP NONPROFIT CENTER FOR EXCELLENCE

FIRST MONDAYS DISCUSSION

TOPIC: Nonprofit Centre for Excellence: Engaging Stakeholders in the Planning Process

DATE: MONDAY, MARCH 6, 2017
First Mondays March 6, 2017  
Topic: Engaging Stakeholders in the Planning Process

Please click here to access the recorded discussion.

Discussion Background:

It is a truth universally acknowledged that an organization in want of an effective strategic plan is in need of a thoughtful, comprehensive planning process. The question is, what should that process look like? This month, the First Mondays conversation will focus on the mechanics of organizing and guiding the strategic planning process for mission driven organizations. What makes a planning process effective, and, what undermines it?

First Mondays discussions are open forums in which all participants are invited to share their experiences and ideas. In March considered the planning process with the following questions:

- What stakeholders do you typically involve in the planning process and why?
- What opportunities can nonprofits take advantage of by engaging stakeholders in planning discussions? What pitfalls do they need to be aware of?
- What have you found to be the most successful practices/processes for engaging stakeholders in the planning process? Have you tried some things that didn’t work?
- Most nonprofits conduct planning on a limited budget. How do you convince an organization of the worth of this engagement effort, and, what are some cost-effective ways to do it?
- Boards are key stakeholders for all nonprofits. What is the board’s role in planning? Where are the lines drawn between the board’s role of governance and strategic leadership? How do we help board members understand and acknowledge those boundaries?

Notes

What stakeholders do you typically involve in the planning process and why?

- Inclusive approach: core team of staff and board leaders to set the framework;
- Information gathering/environmental assessment: internal and external stakeholders
- Important to look at org thru as many lenses as possible to get as good an idea of current state and future potential
- Includes input from ALL staff-they will be responsible for execution, important to include their voices in development process.
- Constituents-more funders are asking for this kind of feedback to determine needs.
- Funders-can help build relationship with funder and provide planning insights
- Feedback from stakeholders during implementation?
  - During pre-planning gathered interesting feedback from funders. ED, board, key staff followed up with funders to discuss, gain more insights into what they said. Resulted in additional funding from one, enhanced relationship with all.
- Vitally important to get feedback from staff on implementation effort; valuable to do so with constituents, funders, stakeholders;
• What level of involvement in the rest of the process of strategy development are stakeholders?
• To what extent do orgs engage stakeholders in the actual development of the strategy?
• External: recipients, funders, regulatory, oversight agencies
• May depend on the relationship the org has with these groups,
• Consider: what value, insight these groups can bring to the plan, specific strategies, performance measures,
• How can your organization collaborate with other similar agencies; align their strategies/tactics?
  o Policy makers and legislators-
  o Valuable to inform advocacy, regulatory/legislative bodies-to develop relationships with policy makers and

What opportunities can nonprofits take advantage of by engaging stakeholders in planning discussions?
What pitfalls do they need to beware of?

• Must be willing to listen, must be aware you may be setting expectations re: action. If you’re not prepare to take action/invest resources; be prepared to hear ideas/direction different from what you want to pursue.
• Before soliciting feedback: be sure you know what is the process for soliciting feedback, evolution of strategies, content of the plan. Be clear about your intentions for engaging stakeholders in soliciting their feedback or gather their deeper insights/understanding. What information do you want from each stakeholder group? Why are you asking?
• What do we need to learn? Who can we learn it from?

What have you found to be the most successful practices/processes for engaging stakeholders in the planning process? Have you tried some things that didn’t work?

• Interviews, surveys, focus groups, actually giving people a seat at the planning table (could be individual or representative from different groups)
• Focus groups—when do they work, when do they not work?
  o A divergent activity-data collection process-can be constructive to get input/feel from a group can identify commonalities as well as outlier thinking;
  o Focus groups with different cultures-must be sensitive to the cultural norms in terms of questions, structure
  o Include “nominal group” process-allow people to record their ideas on sticky notes to allow people uncomfortable speaking out in a group to share their ideas (helpful for staff focus groups)
• When to use different tools to gather information from stakeholders?
• Decision can be driven by resources (staff, time, dollars)
• Have to decide how to prioritize approach
• Funders/donors-interview probably preferred-generates qualitative feedback
• Staff & Board: interviews; but surveys are effective
• Constituents: want as large an “n” as possible-this may make surveys more effective
• If surveying, need validation to check/confirm survey results—could be focus group, listening sessions, interviews
• Collect transactional/point of service data (feedback from constituents about needs, quality/impact of program, attendees at an event, board members at meetings) collect throughout the year, not just during planning process
  o Online
  o Structured conversation (5 simple questions)
  o Survey
  o Focus group
• This input becomes part of quality improvement process; informs changes in delivery
• Strategy for what you what to find out, from whom, when, how will you get it, how will you use data, will guide what tools to use.
• Information Tourism—collecting data because you can. What do you want to learn? What will you do with it?
• Don’t be slaves to the process—be more mindful about what you want to know and why. Let that drive process.
• Invite people to share feedback, also tell them feedback
  o Don’t assume they represent the thinking of a whole

Most nonprofits conduct planning on a limited budget. How do you convince an organization of the worth of this engagement effort, and, what are some cost-effective ways to do it?

Boards are key stakeholders for all nonprofits. What is the board’s role in planning? Where are the lines drawn between the board’s role of governance and strategic leadership? How do we help board members understand and acknowledge those boundaries?

NOTE: If you are interested in facilitating these or other topics as part of 1st Mondays please reach out to Denise McNerney (dmcnerney@ibosswell.com) or Lynne Brown (lbrown@ibosswell.com). Having additional voices engaged in the facilitation of these discussions is a 2017 goal for the Nonprofit Center for Excellence.