

Engaging External Stakeholders

STRATEGIC PLANNING TOOL

PATHWAYS TO EARLY SCHOOL SUCCESS

Building Local Capacity



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Introduction to the Strategic Planning Tool for Engaging External Stakeholders

What is a Stakeholder?

A stakeholder is an individual or organization who supports the work of the coalition. Stakeholders are allies who may choose to contribute resources, advocate on behalf of the coalition, or raise community awareness about the coalition's work and early childhood initiatives.

The Strategic Planning Tool for Engaging External Stakeholders has been designed to organize the process of identifying and engaging stakeholders.

Engaging stakeholders in the coalition's work is important because:

- Stakeholders diversify the breadth of people working towards the coalition's mission
- Stakeholders can provide valuable resources
- Relationships with stakeholders are mutually beneficial

Recommended stakeholders consist of K-12 administrators and faculty and higher education faculty and staff; city government officials; healthcare professionals; business leaders; and parents.

The five steps in this tool are:

Step 1: Refining the Message to Stakeholders (Step 1 may overlap with later steps, depending on how long refining the message takes.)

The purpose of this step is to clarify the current vision of the coalition. Clarifying the vision is necessary for coalition members so that everyone understands what the group wants to accomplish and how they can contribute. Furthermore, clarifying the vision prior to contacting stakeholders is critical so that the coalition message is consistent.

Step 2: Identifying Potential Stakeholders in the Community

The purpose of this step is for the group to brainstorm about potential stakeholders in the community, as well as the possible resources that they may contribute to the coalition.

Step 3: Matching Potential Stakeholders with Coalition Members

In **Step 3**, the NCCP Pathways Team suggests that a coalition member is designated for each stakeholder identified in **Step 2**. The designated coalition members will be responsible for initiating and maintaining engagement with the stakeholders. While specific coalition members will be designated for specific stakeholders, a successful coalition that maintains long-term relationships with stakeholders requires interest and involvement of all members.

Step 4: Creating Informative Materials for Stakeholders

Providing potential stakeholders with materials that contain information about the vision, target audience, goals, and efforts of the coalition gives stakeholders something to think about after the initial contact has been made. The first part of **Step 4** serves to identify materials that the coalition can create to communicate the vision (see **Step 1**) to stakeholders, as well as identify coalition members responsible for creating the materials. Delegating tasks to specific coalition members will facilitate the process of task completion, as well as increase the efficiency of coalition meetings. The second part of **Step 4** provides a space for in-depth planning of specific materials the coalition might create. It may be helpful for coalitions to designate a sub-committee to be responsible for completing an initial draft of this worksheet that would then be discussed with the full coalition for revision and feedback. An example of this worksheet is provided in the appendix of this tool.

Step 5: Planning Activities for Stakeholder Engagement

Establishing and maintaining mutually beneficial relationships with stakeholders requires a deliberate plan. **Step 5** has been designed to help the coalition plan activities and events to engage stakeholders. Once activities are decided, an action plan can be created for each activity. An example of this worksheet is provided in the appendix of this tool.

Worksheets

STEP 1

Refining the Message to Stakeholders

To ensure that a clear and consistent message is communicated to potential stakeholders, we recommend that coalition members come to a consensus on the vision and goals of the coalition. This will improve the clarity among coalition members, and pave way for a more consistent message to potential stakeholders.

Current Vision

Clarified Vision (we recommend including a target age group: prenatal to school-age?)

Other information to discuss with stakeholders (for example, the coalition's impact on the community):

1.

2.

3.

STEP 2

Identifying Potential Stakeholders in the Community

Please use the table below to brainstorm about potential stakeholders and what they might contribute to the coalition.

Potential Stakeholder (specific organization or individual)	Potential Contribution (e.g., time, expertise, funds, building use, access to policymakers)
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	

STEP 3**Matching Potential Stakeholders with Coalition Members**

Engaging stakeholders is a process of cultivating relationships that are mutually beneficial and founded on trust. To facilitate this process, the NCCP Pathways Team recommends specific coalition member(s) be responsible for reaching out to specific stakeholders. This way stakeholders will build a relationship with the coalition members and have a consistent point of contact until the stakeholder is fully engaged.

Please consider current and prior connections when matching coalition members with stakeholders.

Potential Stakeholder	Coalition Member(s)
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	

STEP 4**Creating Informative Materials for Stakeholders**

Providing potential stakeholders with materials that contain information about the vision, target audience, goals, and efforts of the coalition gives them something to think about after the initial contact has been made. Some examples of informative materials for stakeholders include: brochures or a social identity (Facebook page).

Please use the space below to brainstorm about possible materials the coalition will create to provide information to potential stakeholders. To facilitate this process, the NCCP Pathways Team suggests that a sub-committee complete an initial draft of the worksheet on the following page, and then discuss the proposed action plan and timeline with the full coalition.

Type of Informative Material	Responsible Coalition Member(s)
1. Brochure	
2. Website	
3.	

STEP 5

Planning Activities for Stakeholder Engagement

Establishing and maintaining mutually beneficial relationships with stakeholders requires a deliberate plan. This step has been designed to help the coalition plan activities and events to engage stakeholders.

Examples of stakeholder engagement include: inviting potential stakeholders to a coalition meeting, sending a coalition representative to stakeholder meeting (such as school board), hosting a breakfast.

Please brainstorm about activities for stakeholder engagement. A detailed plan for implementing activities can be created using the worksheet on the following page.

Activity 1:

Activity 2:

Activity 3:

Planning Activities for Stakeholder Engagement

Activity Idea: _____

Target Stakeholder: _____

Coalition Member(s) Responsible: _____

Action	Steps	Timeline	Resources Needed	Cost of Materials	Responsible Member(s)
1.					
2.					
3.					
4.					
5.					

Appendices

APPENDIX A – Example of Step 4

Creating Informative Materials for Stakeholders

This worksheet will help coalition members create an action plan and timeline for materials (listed in **Step 4**) to be distributed to stakeholders. To facilitate this process, the NCCP Pathways Team suggests that a sub-committee complete an initial draft of this worksheet, and then discuss the proposed action plan and timeline with the full coalition.

Type of Document: Brochure

Coalition Member(s) Responsible: Jane and Joan

Action	Steps	Timeline	Resources Needed	Cost of Materials	Responsible Coalition Member(s)
1. Decide on content to be included in brochure	Use tools and notes from coalition meeting to decide on content and phrasing	Two weeks	Refined message (see Step 1), NCCP Stakeholder brochure	\$0	Jane and Joan
2. First draft of brochure	Create draft of brochure	Two weeks	MS Word	\$0	Jane
3. Finalize brochure	Jane and Joan make copies of the brochure to bring to coalition meeting. Coalition members provide feedback on brochure	Present brochure at coalition meeting. coalition members provide feedback at following coalition meeting.	Color copies of brochure for ICC members	~ \$30	Jane and Joan: Make copies Full coalition: provide feedback/ input
4. Make final revisions	Use feedback from the coalition to finalize the brochure	One week	MS Word	\$0	Jane and Joan
5. Production of brochure	Revise and print polished copy of brochure	Three weeks	Preferred print company	\$500 – 1,000	Jane and Joan

APPENDIX B – Example of Step 5

Planning Activities for Stakeholder Engagement

This worksheet has been created to help coalition members propose an action-plan and timeline for specific activities and events for stakeholder engagement listed in **Step 5**.

Activity Idea: Engaging Superintendent

Target Stakeholder: K – 12 Administrator

Coalition Member(s) Responsible: Jane

Action	Steps	Timeline	Resources Needed	Cost of Materials	Responsible Member(s)
1. Make initial contact	Phone call to Superintendent	One week	Telephone	\$0	Jane
2. Face to face contact	coalition member attend school board meeting	Fall school board meeting	Brochures (to distribute at school board meeting as necessary/ appropriate)	\$0	Jane
3. Follow-up to engage in the coalition	Invite Superintendent to an coalition meeting	Two weeks after school board meeting	Telephone	\$0	Jane
4. Engage stakeholder in coalition meeting	At meeting, highlight how the coalition's work is related to school district's interests	Late fall coalition meeting	Full coalition Participation	\$0	Full coalition
5. Maintain mutually beneficial relationship	Follow up with phone call(s), continue to attend school board meetings, and to invite to coalition meetings	Ongoing		\$0	Jane for phone calls Full coalition for involvement in future coalition meetings and maintaining mutually beneficial relationship

APPENDIX C – Example of Action Timeline

ACTIONS	MONTH																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	
Step 1. Refining the Message to Stakeholders																	
Coalition clarifies the vision	X																
Coalition decides on other information to discuss with potential stakeholders		X															
Step 2. Identifying Potential Stakeholders in the Community																	
Coalition identifies potential stakeholders	X																
Step 3. Matching Potential Stakeholders with Coalition Members																	
Match coalition members with specific stakeholders	X																
Coalition members make initial contact with potential stakeholders		→															
Coalition members have ongoing contact with stakeholders		→															
Step 4. Creating Informative Materials for Stakeholders																	
Coalition decides on what type of informative material to create		X															
Committee is formed to create initial draft		X															
Committee drafts ideas		→															
Committee presents ideas to full coalition					X												
Revisions						→											
Completion of final version							→										
Step 5. Planning Activities for Stakeholder Engagement																	
Coalition brainstorms activities for stakeholder engagement			X														
Coalition decides on activity to focus on for stakeholder engagement				X													
Responsibilities are distributed				X													
Activity planning takes place																	
Coalition hosts activity				→					X								
Ongoing stakeholder engagement		→															



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