

Engaging Stakeholders in Strategic Planning

The importance of stakeholder engagement in strategic planning

Your key stakeholders—ranging from clients and staff to board members, funders, and community partners—experience your organization from differing vantage points. As such, their input and insight can help inform important decisions. While it’s wise to engage with these groups on an ongoing basis, it’s essential to engage them for strategic planning. Their combined perspectives will round out the picture for your strategic plan, filling in blind spots and offering answers to open questions. You may give some stakeholders formal decision-making and advisory roles in strategic planning, while others provide key input and information.

Stakeholder engagement leads to better strategic plans by incorporating diverse perspectives and ideas in shaping your organization’s future. It also improves change management by increasing buy-in and shared ownership of the strategic plan your organization will ultimately adopt—along with support for its aspirations for impact.

By directly involving the voices of stakeholders closest (most “proximate”) to the work, stakeholder engagement can instill equity into the strategic planning process. Ensuring your stakeholder-engagement plan prioritizes dimensions of diversity—for example, staff of color, frontline staff, and so on—that your organization feels are important will help make the process more equitable.

Creating a stakeholder-engagement plan

This toolkit will walk you through three components of a stakeholder-engagement plan while helping you steer clear of common mistakes.

Bear in mind that, while you will want to think carefully up front about whom to engage and how, you may also want to revise your plan as your strategic planning process unfolds. We suggest using this toolkit with our guide to [“How Nonprofits and NGOs Can Get Real Value from Strategic Planning.”](#)

Here are the three components of a stakeholder-engagement plan:



- Who are the stakeholder groups who need to be engaged?
- What are your objectives with each group? What do you want to learn?

- How (via what format or channel) will you engage each stakeholder group?
- What messages will you share and what questions will you ask?

- When will you engage each stakeholder group (i.e., at what point in the planning process)?
- When will you close the loop?

Stakeholder-Engagement Plan Template Explained

KEY QUESTIONS

- Who are the stakeholder groups who need to be engaged?
- What are your objectives with each group? What do you want to learn?

KEY QUESTIONS

- How (via what format or channel) should you engage each stakeholder group?
- What messages will you share and what questions will you ask?

KEY QUESTIONS

- When will you engage each stakeholder group (i.e., at what point in the planning process)?
- When will you close the loop?

WHO and WHY

HOW

WHEN

STAKEHOLDER

OBJECTIVES

MESSAGING

FORMAT

OWNER

TIMING

Determine *who* to engage and *why*

Possible stakeholders include your board of directors, staff, constituents (clients, alumni), funders, partner agencies, and other actors in the field or communities where you operate.

As you make your list, make sure you include diverse perspectives, decision makers, and those most affected by the issues being discussed.

After selecting which stakeholders to prioritize, make clear your objectives for each—what is the depth of engagement you’re trying to reach (e.g., learn perspectives, make decisions, build buy-in)?

Decide how to engage each stakeholder group

To create a shared context with all stakeholders, craft talking points that address common questions. For example, what is a strategic plan? Why are you doing it now? How is it helpful? What was the process of developing this plan?

As needed, create more specific talking points or questions that help frame what you’re hoping to learn from each stakeholder (e.g., an interview with a funder will look different than an interview with a program participant).

Figure out what format to use with each stakeholder (e.g., interviews, surveys, focus groups, etc.) and who will lead engagement, considering existing relationships. Ensure the “owner” selected has the bandwidth to follow through and can have open and honest conversations with the stakeholder group they will engage.

Clarify when to engage

Sequence stakeholder outreach and engagement based on your objectives (e.g., engage those providing input early in the process) and interdependencies (e.g., build internal buy-in before sharing information or decisions externally).

Plan to follow up and close the loop with key stakeholder groups later in the process to share your strategic plan and how their engagement helped in its development.

Stakeholder-Engagement Plan Template

How will you engage stakeholders during your strategic planning process? Capture your thinking in the table below using a different row for relevant stakeholders or stakeholder groups.

WHO and WHY		HOW			WHEN
STAKEHOLDER	OBJECTIVES	MESSAGING	FORMAT	OWNER	TIMING
			•	•	•
			•	•	•
			•	•	•
			•	•	•
			•	•	•
			•	•	•
			•	•	•
			•	•	•
			•	•	•
			•	•	•
			•	•	•
			•	•	•
			•	•	•
			•	•	•
			•	•	•

Tips for Stakeholder Engagement

While robust and inclusive stakeholder engagement can help improve a strategic planning process and the strategic plan that results, there are also potential risks to keep in mind. Here are a few tips to help you steer clear of common mistakes.

- **Seek out a diversity of perspectives.**

One of the biggest opportunities of stakeholder engagement is hearing from a variety of people about how your organization is doing and ways it can move forward. Without reaching out to people in different positions and with a variety of backgrounds, you risk receiving incomplete and skewed feedback that might leave you with blind spots. Make sure you consider the range of feedback you'll need to inform strategic planning and seek out perspectives from those most affected by your plan.

- **Be specific about what you want to learn from each stakeholder.**

Without clarity, you may not receive the information or perspectives you most need. Before reaching out to stakeholder groups, take the time to really consider why you're engaging this group, and to what end, noting that this may evolve as the strategic planning process continues.

- **Communicate clearly about decision-making structures.**

Without understanding what might come of their engagement, stakeholders could be disappointed if they feel their perspectives were ignored or had less influence than they expected. Be up front about the decision-making roles so everyone can set their expectations and understand how their engagement will be factored into decisions made in the strategic planning process.

- **Avoid being too transactional.**

People will know if your questions for them are genuine or if you are going through the motions when soliciting their input. The latter will feel transactional and unsatisfying for everyone. As you prepare, make sure you understand why you need to have each conversation and be clear about that in your communications with each stakeholder group so they can also appreciate the value they are providing.

- **Close the loop after engaging people deeply.**

Asking for engagement is a privilege. By not following up with each stakeholder, you risk undermining trust, making it harder to engage them in the future. While some individuals and stakeholder groups will be deeply involved in the planning process, there are others you might only engage once or twice (e.g., if you are surfacing key questions as the process begins, or if you are shaping specific elements of your plan). For stakeholders who are less engaged, it's important to follow up and close the loop. When you circle back with people you engaged, make sure to communicate how the input they shared was used and what decisions were made.

Stakeholder-Engagement Plan Example (1 of 2)

How will you engage stakeholders during your strategic planning process? Capture your thinking in the table below using a different row for relevant stakeholders or stakeholder groups.

WHO and WHY		HOW			WHEN
STAKEHOLDER	OBJECTIVES	MESSAGING	FORMAT	OWNER	TIMING
Steering committee*	Steward the strategic planning process	Share overview of strategic planning process and role of steering committee (e.g., to review inputs and analyses, develop hypotheses, and make recommendations to executive director and board on the path forward for the organization)	Monthly meetings	Executive director or project lead**	Meetings to take place throughout the strategic planning process
Board of directors	Align on key questions and decisions to guide the strategic planning process	Share overview of strategic planning process and clarify decision-making roles	Board meeting and 1:1 interviews	Executive director	First month of the strategic planning process
		Gather input on key challenges and opportunities for the organization; elevate hypotheses	Board meeting	Executive director	Seek approval for key decisions and recommendations emerging from the strategic planning process and the final strategic plan
Staff	Gather input, perspectives, and data to help inform priority questions and decisions central to the planning process	Gather input on key challenges and opportunities for the organization; pressure-test hypotheses	Focus group with BIPOC staff	Director of programs	In the first months of the strategic planning process
		Gather input on key challenges and opportunities for the organization; pressure-test hypotheses	Staff survey	Project lead	In the first months of the strategic planning process
		Announce new strategic plan, key shifts in our strategy, and implications for our staff and organization	Staff town hall	Executive director	After strategic plan approved by board
Clients and beneficiaries	Gather perspectives on strategy and concerns	Share details about the purpose and process of this strategic plan; ask for input and feedback on client experience with programs and services	Email and group meeting	Director of programs	In the second month of the strategic planning process
	Create interest in planned strategic shifts	Announce new strategic plan and share implications for future programs and services	Email and group meeting	Director of programs	At the end of the strategic planning process

* In selecting a steering committee to steward your strategic planning, consider a core team of ~6-10 individuals who can credibly represent the interests and voices of your organization and who reflect the dimensions of diversity that are most important to your organization and its mission.

** Some organizations elect to have a project lead guide the planning process—ensuring key input is obtained, analysis is complete, and stakeholders are engaged. An ideal project lead role is a strategic thinker who can coordinate across functions within your organization (e.g., a chief of staff or director of strategy).

Stakeholder-Engagement Plan Example (2 of 2)

How will you engage stakeholders during your strategic planning process? Capture your thinking in the table below using a different row for relevant stakeholders or stakeholder groups.

WHO and WHY		HOW			WHEN
STAKEHOLDER	OBJECTIVES	MESSAGING	FORMAT	OWNER	TIMING
Partner organizations	Gather input on strategic direction	Share that we're embarking on a strategic planning process to increase our impact; ask for feedback on opportunities for improvement based on work to date	Individual meetings with key partners	Director of partnerships	First or second month of the strategic planning process
	Share updated strategy and implications for the organization	Explain the shifts we are making to our strategy and what related implications these shifts may have on our partnerships	Individual meetings with key partners	Director of partnerships	Final weeks and month(s) of the strategic planning process
Lead funders	Gather input on strategic direction	Share that we're embarking on a strategic planning process to increase our impact; ask for feedback on opportunities for improvement based on work to date	Individual meetings with lead funders	Executive director and development director	First or second month of the strategic planning process
	Build interest in and excitement for our strategic plan	Explain the shifts we are making to our strategy; share how these shifts relate to the priorities of each funder and our aspirations for impact	Individual meetings with lead funders	Executive director and development director	Final weeks and month(s) of the strategic planning process