



Community
Wealth Partners
by SHARE OUR STRENGTH

Engaging Stakeholders in Developing Strategies

A Field Guide

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Introduction

To address complex challenges, we need strong strategies. Our research and experience suggest that strategies are stronger when we engage a diverse set of people in shaping solutions.

The process of engaging people is often called stakeholder engagement. When done well, it can lead to new ideas, stronger and more viable strategies, shared ownership of the vision, greater insight into stakeholder needs, and stronger relationships with stakeholders. But when done poorly and viewed as a checkbox exercise, it can damage trust with stakeholders, fail to add value, and harm the communities you seek to help.

Many organizations engage stakeholders in their strategy development processes. In this field guide, we'll share thoughts and questions to reflect on at the beginning of a strategy development process. Our goal is to help you start the process with a clear understanding of which stakeholders you want to engage, why their input matters, and how you will engage them. Though we focus on the strategy process, the information in this field guide might also support stakeholder engagement in other contexts, and we encourage stakeholder engagement as a regular practice outside of the strategy process. Throughout this guide, we challenge ourselves – and encourage you to challenge yourself – to reconsider who stakeholders are and how to engage them in more equitable ways.



Who We Are

Community Wealth Partners is a social impact consulting firm on a mission to co-create a world where all people thrive. We were created by the nonprofit Share Our Strength to partner with social sector organizations to figure out what works and share what we learn with others.

Get in Touch

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Point of View & Definitions

Over the years, we've developed some points of view on stakeholder engagement. Here's what our experience has taught us:

Strong stakeholder engagement is crucial to creating strong strategies. Your strategy won't be successful without engaging a diverse set of people in shaping it.

The stakeholders whose voices should lead your strategy are those who are closest to the issues. This often means those who have not had the power or resources to shape solutions.

Stakeholder engagement shouldn't be approached as a checkbox exercise. Doing so will likely cause more harm than good.

The process of engaging stakeholders is valuable in itself. It can help you strengthen relationships with stakeholders, which ultimately helps you do your work better.

Stakeholder engagement should be a regular practice as opposed to a short-term activity limited to a strategy process. You'll be better equipped to implement a strategy and change your approach if you regularly engage stakeholders.

STAKEHOLDERS, *noun*

In this field guide, we're defining "stakeholders" as the people who will be impacted by your strategy and/or should influence the development of your strategy. This might include community members, staff, board, chapters/affiliates/network members, organizations that serve the same communities you serve, organizations that are comparable to yours, public officials, funders, academic experts, and other colleagues or advisors.

COMMUNITIES, *noun*

In this field guide, we're defining "communities" as the people closest to the issues, with an emphasis on those who face the deepest inequities and who are furthest from systemic forms of power. For example, if you're focused on expanding access to preschool education, the communities you serve may include preschool-aged children and their families, with an emphasis on Black and Brown children who have fewer educational opportunities, children on tribal lands who have limited access to educational institutions, and/or children with disabilities who have limited access to teachers who can effectively support their learning journey.

Engaging Communities in Equitable Ways

Those who are closest to the issues are closest to the solutions.

More organizations are recognizing how critical it is to engage communities as they develop strategies that will impact them. The way you engage communities has the potential to heal old wounds and build collective power, but it also can deepen mistrust and harm communities. It's important to approach community engagement with care and consideration.

A word of caution: Engaging stakeholders of any sort is a new practice for some organizations. If that describes you, we advise building your stakeholder engagement muscle closer to home (e.g., with staff and board) before engaging communities. You may learn valuable lessons there that can help you avoid causing harm once you begin to engage communities.

This approach draws on insights from the National Gender and Equity Campaign, Asian Americans/Pacific Islanders in Philanthropy, Building Movement Project, King County Washington, Marnita's Table, and our own experiences.

Here are some suggestions for more equitable ways to engage communities.

Clarify purpose, outcome, and process

- Understand what you want to achieve through the engagement
- Identify who is most impacted by the issue at hand and design a process that centers and shifts power to them
- Leave space for flexibility and responsiveness to community needs
- Recognize that many different perspectives can exist within one community

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["Four Questions to Sit With as You Learn to Let Communities Lead."](#)
Community Wealth Partners

Understand history with various communities

- Avoid duplication by understanding which groups have been recently engaged, how they've been engaged, and what information they've shared previously that could help you now
- Acknowledge any previous challenges or missteps to build trust; identify current assets in your relationship with communities
- Understand and acknowledge the broader historical context

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["Community Engagement Guide for Sustainable Communities."](#) PolicyLink

Engaging Communities in Equitable Ways (*continued...*)

Take an asset-based approach

- Seek first to understand the community's strengths and assets
- Recognize that solutions exist within the community; recognize the value in both those with formal credentials (e.g., academic expertise) and those with lived experience
- Work with partners who are trusted in the communities you are trying to reach and knowledgeable about community resources; build on what is already working (i.e., existing ways of engaging the community)

DIVE DEEPER

["Build a Playground Toolkit: Community Involvement,"](#) KaBOOM!

Create space for relationship-building

- Relinquish the need for each interaction with the community to be productive to the strategy process; make space to build and strengthen relationships without an agenda

DIVE DEEPER

["What Institutions Get Wrong About Community Engagement and How They Can Improve,"](#) Marnita's Table

Reach those most impacted

- Make participation accessible (e.g., location, date, time, translation, childcare, transportation, food and drink)
- Respect and value participants' insights and time (e.g., compensation)
- Listen empathetically, seeking to understand, not to reply or reframe

DIVE DEEPER

["Why Am I Always Being Researched?"](#) Chicago Beyond

Set clear expectations and create feedback loops

- Share decision-making power where possible; in all cases, clearly define and transparently communicate participants' role (e.g., input vs. decision-making); communicate upfront how you plan to use their input and limits to what you can act on
- Create feedback loops to gather feedback regularly throughout the process, communicate any resulting decisions, ensure participants know how their feedback was used, and ensure participants have future opportunities to engage
- Communicate how you plan to stay in relationship with the community during and after the strategy development process

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["The Spectrum of Community Engagement to Ownership,"](#) Facilitating Power



Your Approach to Engaging Stakeholders

Before you begin the strategy process, consider what you want stakeholder engagement to look like. You can reflect on questions related to **who** you engage, **why** you engage them, **what** you do with their input, **how** you engage them, and **when** you engage them. Your thinking may evolve over the course of this process, so be prepared to adapt your approach.

WHO

Description	Questions for Reflection
<p>Whose participation in this process will lead to a stronger strategy?</p> <p>It's important to engage people who carry out the work, people who make decisions about the work, and people impacted by the work, in addition to others who may offer valuable perspectives. (Individuals may fall in more than one stakeholder group.) Challenge yourself to go beyond the usual suspects. Stakeholder groups could include:</p> <ul style="list-style-type: none"> • Community members and community-based organizations • Staff, board, and chapter/affiliate/network members • Organizations that provide comparable services in your sector and in other sectors • Government staff and elected officials • Funders • Coalition members • Academic experts, third-party facilitators, and evaluators 	<ul style="list-style-type: none"> • What assets do these stakeholders bring? • How have these groups been engaged recently? What is their relationship and trust level with you? • Where does power sit among your stakeholders? (i.e., Which stakeholders typically hold the most systemic power, and which ones are typically furthest from systemic power?) How might that impact the ways you engage these stakeholders? How might you shift power by who you engage and how you engage them? • What do these stakeholders need in order to meaningfully engage? (E.g., community members might need translators, childcare support, funds to make up for lost wages, and clarity on how their input will be used; comparable organizations might need you to model transparency so they feel comfortable sharing openly with you)



Your Approach to Engaging Stakeholders *(continued)*

WHY

Description

Why do you want to engage these stakeholders?

Think about what outcomes you hope to achieve through engaging them. For each group of stakeholders, there might be different reasons you're engaging them.

Questions for Reflection

- What do you hope to learn from engaging these stakeholders? What questions do you want to explore with each group of stakeholders?
- How might stakeholders benefit from being part of the process? How might being part of the process create added burden for them? How can you express appreciation for their engagement? (e.g., provide compensation for their time; share back insights with them)

WHAT

Description

What will you do with stakeholders' input?

Stakeholders' input could serve several purposes, to draw from "The Spectrum of Community Engagement to Ownership" by Rosa González of Facilitating Power:

- **Inform:** *"We will keep you informed."* You keep stakeholders informed without involving them in the process. (e.g., presentations, videos)
- **Consult:** *"We care what you think."* You gather input from stakeholders. (e.g., surveys, focus groups)
- **Involve:** *"You're making us think and act differently."* You ensure stakeholders' voices, needs, and assets are integrated into your strategy-development process and inform your planning. (e.g., community meetings, interactive workshops, polling)
- **Collaborate:** *"Your leadership and expertise are critical to how we address the issue."* You ensure stakeholders (or a specific group of stakeholders, like community members) have the capacity to play a leadership role in making and implementing decisions. (e.g., partnerships with community-based organizations, open planning forums)
- **Defer To:** *"It's time to unlock collective power and capacity for transformative solutions."* You foster stakeholder- or community-driven decision making. (e.g., community-driven planning, participatory decision-making)

Place yourself on the spectrum and consider ways you can begin moving further toward community ownership. For example, if you typically conduct surveys to understand community members' perspectives, consider facilitating an interactive workshop that allows community members to work together to create a shared understanding of the challenges they face and a shared vision for where they want to go.

As you engage each stakeholder, make sure to communicate how you intend to involve them and what you intend to do with their input. If expectations are misaligned, it can hurt your relationships with stakeholders.

Questions for Reflection

- Where would you place yourself on the spectrum? What are ways you can begin moving toward community ownership?
- What input are you not willing to hear? Why not?
- How can you be clear with stakeholders upfront about what to expect? (i.e., how you'll use their input, what input is off the table, when/how frequently they can expect to hear from you or engage with you)

Learn more in "[The Spectrum of Community Engagement to Ownership](#)"



Your Approach to Engaging Stakeholders *(continued)*

HOW

“If the people participating have not had the chance to develop a shared analysis of the problem or articulate a shared vision, values, and priorities, with their peers, then they don’t actually represent a ‘community.’ They are simply participating as individuals, and therefore are only ‘tokens’ of the community they are supposed to represent.”

—*“The Spectrum of Community Engagement to Ownership”*
by Rosa González of Facilitating Power

Are there spaces in the community where people come together to make sense of the problems they face and talk about what they want? Consider community-based institutions, like community organizing groups or places of worship, that may facilitate these spaces and conversations. If these spaces are minimally available, consider ways you can invest in the capacity of the community to come together to do this. Creating these spaces and investing in this capacity takes time. Plan accordingly and avoid rushing the process to align with your desired timeline.

Description

Questions for Reflection

How will you engage stakeholders?

Make sure your team is aligned on how decisions about the strategy will be made and who the decision-makers are. Then, based on that, put thought and care into how you’ll engage stakeholders. You may engage each group of stakeholders differently. For example, you may engage staff more actively throughout the process than you engage board members. For communities, think through whether they’ve had a chance to develop a shared understanding of the challenges they face and their aspirations for the future (see sidebar). If they haven’t, build in opportunities for creating that shared understanding so that participating community members can truly represent the community. You might also consider ways to bring together people from different stakeholder groups so they can build relationships with and learn from each other.

You will probably want to use a combination of different methods with different stakeholder groups at different times. Some methods you might use to engage stakeholders include:

- Interviews & focus groups
- Surveys
- Informal conversations
- Storytelling & oral histories
- Community forums
- Facilitated discussions
- Interactive workshops
- Voting & polls

- How can you use this opportunity to build stronger relationships with stakeholders? How can you build capacity for future engagements with them?
- How will you hold different or conflicting perspectives?
- What is the cost to the people being engaged? We strongly recommend that you provide value for people’s time (e.g., give stipends for interviews; share insights back with stakeholders).

If we again draw from “The Spectrum of Community Engagement to Ownership,” you may use some of the following methods based on the level of engagement you’re seeking:

- **Inform:** Fact sheets, presentations, videos, etc.
- **Consult:** Interviews, focus groups, surveys, informal conversations, community forums, etc.
- **Involve:** Interactive workshops, community forums, polling that influences decisions, etc.
- **Collaborate:** MOU’s with community-based organizations, community advisory committees, open planning forums with collaborative decision-making, etc.
- **Defer To:** Community-driven planning, consensus building, participatory budgeting, etc.



Your Approach to Engaging Stakeholders *(continued)*

WHEN

Description

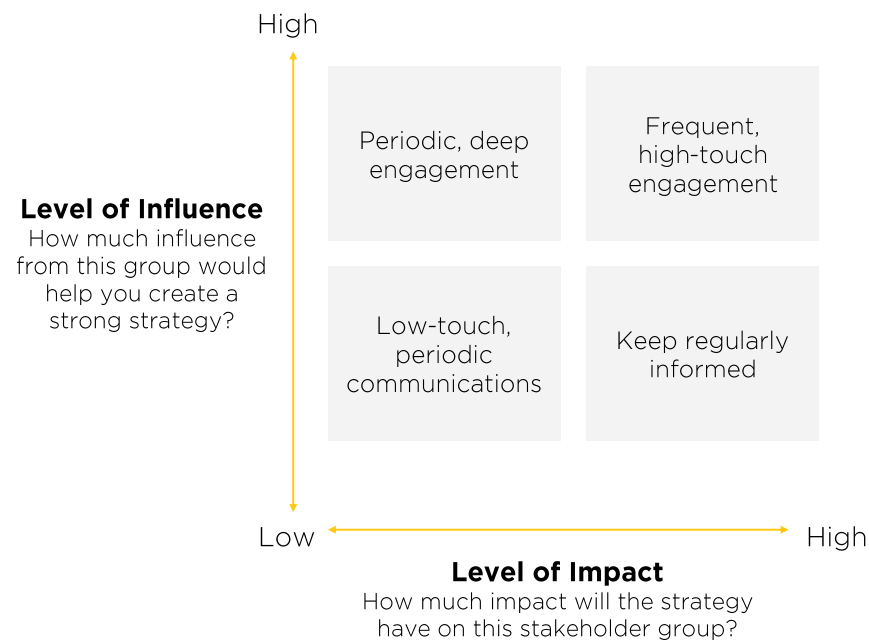
At what points in the process will you engage stakeholders?

We recommend engaging stakeholders at various points in the process. It can help to bring some stakeholders in first to help define the need, develop the hypothesis, and push your thinking before you go too far in one direction. Then you might bring them in again later to align on a common vision.

Questions for Reflection

- Who is best positioned to push your thinking? Who can bring different perspectives and experiences? At what points in the process would that be most helpful?
- Who is best positioned to help you crystalize your thinking? At what points in the process would that be most helpful?
- Who is best positioned to help you turn your thinking into something actionable? At what points in the process would that be most helpful?
- Have you built in enough time to engage stakeholders in the way you want to?

STAKEHOLDER ENGAGEMENT FRAMEWORK





Closing

As you consider how to engage stakeholders, challenge yourself to take it further. You might approach stakeholders, particularly communities, as co-creators or shift decision-making power to them.

Throughout the process, things might change; say you realize halfway through that the strategy you'd been developing is no longer viable. Be prepared to adapt your approach, communicate transparently with stakeholders, prioritize relationships, and prioritize a strategy that centers communities. You can contribute to stronger outcomes if you take a thoughtful approach to how you engage people.

Resources

CASE STUDY

[Community-Led Change: How the Wells Fargo Regional Foundation Builds the Capacity of Nonprofits and Communities to Shape Neighborhoods Together](#), GrantCraft

BLOG

[Four Questions to Sit With as You Learn to Let Communities Lead](#), Community Wealth Partners

FRAMEWORK

[The Spectrum of Community Engagement to Ownership](#), Facilitating Power

GUIDE

[Community Engagement Guide for Sustainable Communities](#), PolicyLink

BLOG

[What Institutions Get Wrong About Community Engagement And How They Can Improve](#), Marnita's Table

GUIDE

[Why Am I Always Being Researched?](#), Chicago Beyond

GUIDE

[A Guide on Community Engagement: Making Social Justice Work Inclusive](#), National Gender and Equity Campaign

GUIDE

[Facilitation Guide for Community Engagement](#), National Gender and Equity Campaign in Minnesota

TOOLS

[Tools to Engage: Constituent, Client, and Civic Engagement](#), Building Movement Project

TOOLS

[Sources of Power](#), National Community Development Institute