Embracing Strategic Planning as a Community Engagement Tool

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- Consultant to public and nonprofit organizations
- Skilled in using data to facilitate and inform decision making
- Has worked with dozens of small and mid-size organizations since 2013
- Three cats, two kids, and one husband
First things first. What are our learning objectives?

At the end of this session, you will be better equipped to:

1. Identify audiences to include in your next strategic planning process.

2. Use tips for incorporating internal and external feedback.

3. Pull together data, feedback, and your expertise into an actionable plan.
Strategic planning and community engagement are natural complements.
The pandemic has made nonprofit planning challenging.
Poll

Which of the following has your organization historically been the LEAST likely to seek feedback from?

- 1. Staff
- 2. Individual donors
- 3. Individuals or families you serve
- 4. Funding organizations
- 5. Partner organizations
Which voices should we listen to?

- Those we serve
- Those who support us
- Those who lead decision making
- Those who implement
What does this participatory process look like in action?

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<thead>
<tr>
<th></th>
<th>ADVANTAGES</th>
<th>DISADVANTAGES</th>
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<tbody>
<tr>
<td><strong>SURVEYS</strong></td>
<td>• Can reach a large number of people</td>
<td>• Requires strategies to reach wide cross-sections of the community</td>
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<td>• Findings are easily tabulated</td>
<td>• Depending on survey method, can be costly</td>
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<td><strong>FOCUS GROUPS</strong></td>
<td>• Can provide in-depth discussion of specific topics</td>
<td>• Reaches a smaller number of participants</td>
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<td>• Allows for follow-up questions</td>
<td>• Requires strategies to recruit participants</td>
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<td>• May require a third party facilitator</td>
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<td><strong>COMMUNITY CONVERSATIONS</strong></td>
<td>• Can provide meaningful input through an informal discussion</td>
<td>• Reaches a smaller number of participants</td>
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<td>• Allows for follow-up questions</td>
<td>• Requires strategies to recruit participants</td>
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<td>• Findings may be more cumbersome to analyze</td>
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Beware of silos and echo chambers!

- Lack of representation
- Limited perspective
- Biased feedback loop
- Unchecked assumptions

images: Flaticon.com

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There are many reasons why someone may not be engaged in the process.

- Unclear purpose
- Lack of relevance
- Barriers to participation
COVID-19 also has influenced our perceptions of our communities.

“Where do we fit in?”

“We need to get back to normal.”

“I need help.”

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The local dialogues in 2020 and 2021 about reopening schools can tell us a lot about planning within a bubble.

Photo by Bill Nino on Unsplash
All of this information is great.

But how do we sort through it and make an actionable plan?

1. Compile data and community engagement input together:
   - Demographic information;
   - Surveys; and
   - Focus group and community conversation notes.

2. Review the findings in a group. Discuss and clarify.

3. Compare themes against what is possible.
Let’s get back to our learning objectives.

Today, this information helped prepare you to:

1. Identify audiences to include in your next strategic planning process.
2. Use tips for incorporating internal and external feedback.
3. Pull together data, feedback, and your expertise into an actionable plan.
Excited to get started?

Here are some actionable next steps:

- Find your organization’s strategic plan. Do you have one? Is it useful?
- Think about a decision you will be making this year. Identify which questions would be most helpful to you to have answered to inform that decision.
- Identify 1 or 2 individuals outside your closest circle whose feedback is valuable to you. Reach out to them!
Thank you for your time today!

I’m happy to connect with you.

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