

Techniques for Stakeholder Assessment:

Learn Three Stakeholder Assessment Techniques
To Help Improve Your Strategic Planning Process

Monday, October 22
1:45pm – 2:45pm

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- Basic Analysis Technique (BAT)
- Power vs. Interest Grid
- Stakeholder Influence Diagram





BWR1	Phase	Key Activities	Key Products	Timeline	
Organize	Prepare	Convene planning committee (PC)	Directors Group (DG) and staff buy-in	Month 1 February	
		DG – input Q&A			
		Develop planning timeline	Timeline for planning		
	Listen	Stakeholder mapping – DG/PC exercises		Summary - stakeholder mapping	Month 2-3 March/April
		Stakeholder listening - feed plan	Summary - stakeholder listening , DG input Q&A		
		Organizational health check-up (Executive/Directors/staff)			
Financial analysis		Summary of key financial information/organizational health issues - presentation			
Imagine	Envision	Review and discuss stakeholder input	SWOC/T analysis	Month 4-6 May-August	
		Director Group, PC, & staff discussion to develop mission statements	Mission statements		
	Plan	Directors & PC set 3-5 primary goals	Confirm 3-5 primary goals	Month 7-8 Sept - Oct	
		Determine strategic objectives	Establish strategic objectives		
Launch	Execute	Engage DG & staff in development of supporting strategic objectives (implementation plan)	Implementation plan – Logic models: outline/assign tasks for completing strategic objectives	Month 9 November	
		DG approval			
		Discuss how to monitor plan	1-page summary of organizational history		
	Evaluate	DG align resources & people to the plan goals & objectives	DG monitors plan	Month 10 December	
		Identifies key metrics/success indicators	Outcomes/indicators for each strategic objective		
		Establish system to collect relevant data and report information to stakeholders	Dashboards for DG & staff Develop avenues to distribute plan progress to stakeholders		

- Interviews
- Questionnaires
- Focus groups
- Other information gathering techniques

(Bryson, 2017; Allison & Kaye, 2005)



Basic Analysis Technique (BAT)

1. Identify specific organizational stakeholders
2. Identify stakeholders at the right level of aggregation
3. Key stakeholder group is explicitly identified

(Ackermann & Eden, 2011; Bryson, 2017; Crosby & Bryson, 2005)



Basic Analysis Technique (BAT) – Activity 1

- ✓ Identify Stakeholders
- ✓ Establish Stakeholder Criteria (*Mission statement - purpose*)
- ✓ Self-Assessment of Stakeholder Criteria Against Performance (*SWOC/T*)
- ✓ Self-Reflection of Perceived Performance

(Bryson, 2017; Crosby & Bryson, 2005; Lewis & Gilman, 2012; Thomas, Poister, & Su, 2015)



Power vs. Interest Grid

Players

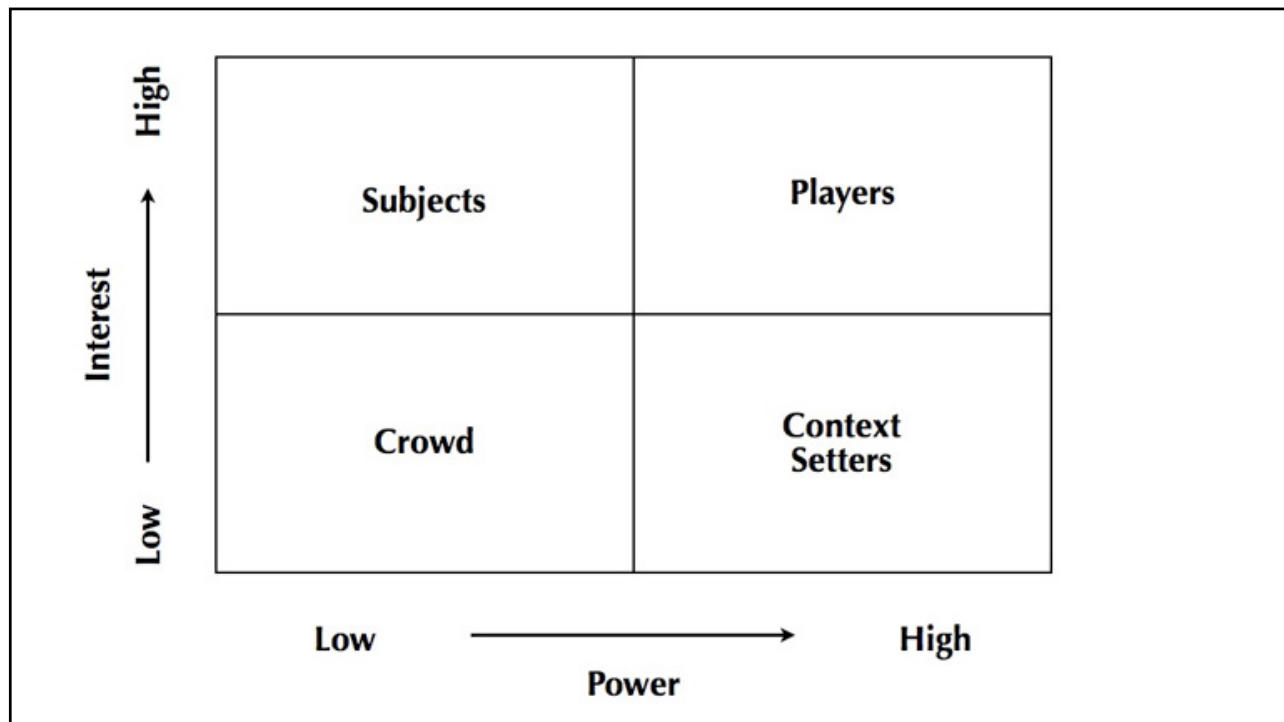
Context Setters

Subjects


Crowds

(Ackermann & Eden, 2011; Bryson, Cunningham, & Lokkesmoe, 2002; Bryson 2017)





Power vs. Interest Grid....promotes



- ✓ Coalitions to be encouraged & discouraged
- ✓ Behavior that should be fostered
- ✓ People whose buy-in should be sought
- ✓ Provides information on how to change stakeholder views

Power vs. Interest Grid – Activity 2

Players -> *Manage Closely*

Context Setters -> *Keep Informed*

Subjects -> *Keep Satisfied*

Crowd -> *Monitor*

(Ackermann & Eden, 2011; Bryson, Cunningham, & Lokkesmoe, 2002; Bryson, 2017)

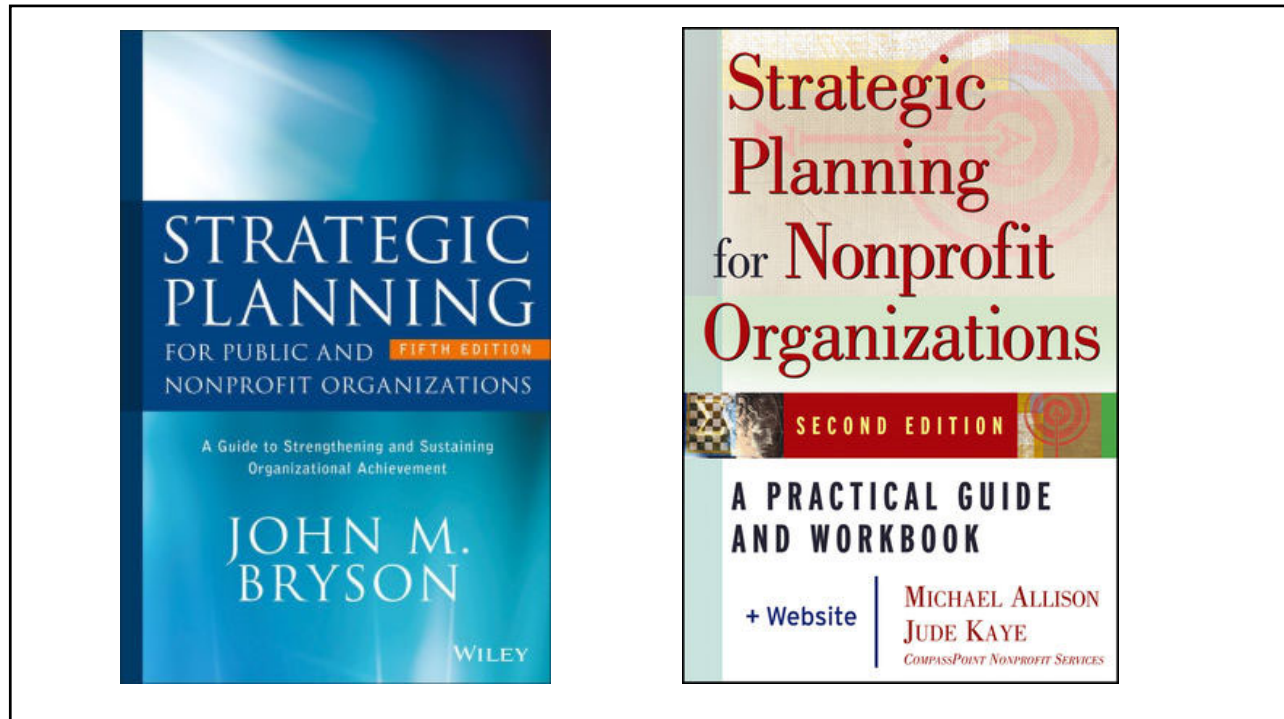


Stakeholder Influence Diagram

- ✓ Indicates how stakeholders influence each other
- ✓ Complete after a Power vs. Interests Grid

(Ackermann & Eden, 2011; Bryson, Cunningham, & Lokkesmoe, 2002; Bryson, 2017)





References

- Allison, M., & Kaye, J. (2005). *Strategic Planning for Nonprofit Organizations* (2nd ed.). Hoboken, NJ: John Wiley & Sons, Inc.
- Ackermann, F., & Eden, C. (2011). *Making strategy: Mapping out strategic success*. London, England: Sage.
- Bryson, J. M. (2017). *Strategic Planning For Public and Nonprofit Organizations* (5th ed.). Hoboken, NJ: John Wiley & Sons, Inc.
- Bryson, J. M., Cunningham, G. L., & Lokkesmoe, K. J. (2002). What to do when stakeholders matter: The case of problem formulation for the African American men project of Hennepin County, Minnesota. *Public Administration Review*, 62(5), 568-584.
- Crosby, B. C., & Bryson, J. M. (2005). *Leadership for the common good: Tackling public problems in a shared-power world*. San Francisco, CA: Jossey-Bass.
- Lewis, C. W., & Gilman, S. C. (2012). *The ethics challenge in public service: A problem-solving guide* (3rd ed.). San Francisco, CA: Jossey-Bass.
- Thomas, J. D., Poister, T. H., & Su, M. (2015). In the eye of the beholder: Learning from stakeholder assessments of public value. In J. M. Bryson, B. C. Crosby, and L. Bloomberg (Eds.), *Public value and public administration* (pp. 170-186). Washington, DC: Georgetown University Press.
- Washington Nonprofits Institute. (2018). *Strategic Planning in Nonprofits (SPiN)*. Retrieved from file:///U:/Strategic%20Planning/SPIN%20FOLDER/SPIN_Workbook_Workshop_Final.pdf

Thank You
& Good Luck



Basic Analysis Technique (B.A.T)

Key points to remember when completing the BAT.

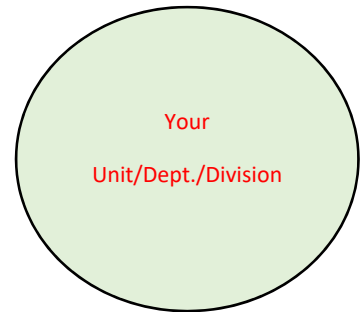
1. The stakeholders identified represent any outside organization, network, or collaboration in which individuals and groups contest for control of organizational attention, resources, and outputs.
2. Identify stakeholders at the correct level of aggregation. (Ex. *Union Board at the Student Center vs. Student Center*)
3. To further aggregate, consider key employee groups. Employee groups will have different criteria to judge organization performance. (Ex. *Director vs. Assistant Director*)

Completing the BAT will assist in setting the stage for a discussion of the organization's mission.

NOTE: *If you need help brainstorming stakeholders, review your daily appointment calendar and inbox emails. Whom are you speaking with the most on a regular basis?*

Step One: Identify stakeholders

Who are your stakeholders?



EX. Student Center -> Union Board -> Assistant Director

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

Step Two: Establish stakeholder criteria

What criteria do you think the stakeholders use to evaluate your performance?

Note: Use the stakeholder number from the previous activity as an identifier in the three remaining steps in this activity.

Stakeholders	Criteria
EX.	Union Board Assistant Director: Housings ability to endorse Union Board events and show up with students to Union Board programs.
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	

Step Three: Self-Assessment of stakeholder criteria against performance

Your best guess, how would the stakeholders evaluate your performance against their criteria? Mark an X inside a box to indicate how you think the stakeholders would evaluate your performance against their criteria.

Note: If you are unsure how the stakeholders would evaluate your performance, mark the N/A box in the corresponding row.

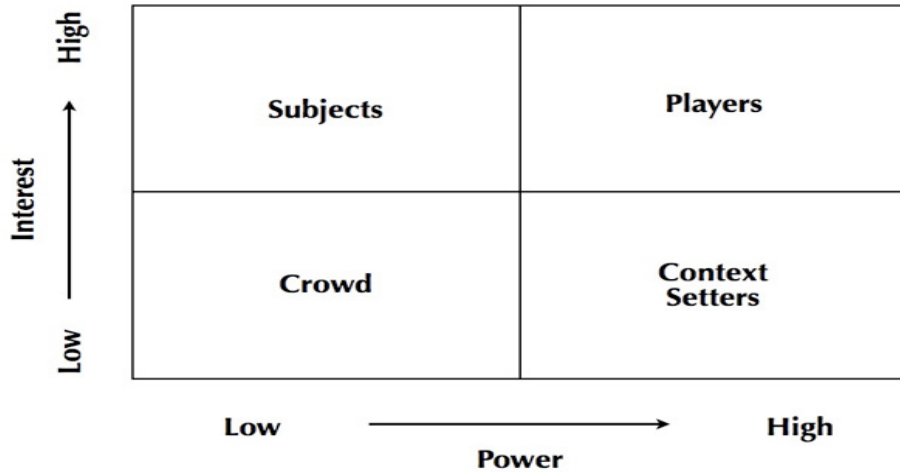
Stakeholders	SCALE					
	Very Poor 1	2	Okay 3	4	Very Good 5	N/A
Ex.				X		
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						

Step Four: Self-Reflection of Perceived Performance

Please explain your evaluation from step three. Why do you think stakeholders would agree with the performance rating in the previous section?

Stakeholders	Rationales
Ex.	Housing professional staff members actively participate in planning Union Board events. In the past, Residential Life has contributed funding to assist in bring specific programs to campus.
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	

Power vs. Interest Grid



Players: Those with high power and high interest. **(Manage Closely)**

Context Setters: Those with high power and low interest. Their power helps set the context but they are not interested enough to be players. **(Keep Informed)**

Subjects: Those with high interest and lower power. They are subject to the power of others. **(Keep Satisfied)**

Crowd: Low interest and low power. **(Monitor)**

Instructions: Write the name of the stakeholders in the table below. Place an X underneath the stakeholder category that you believe properly reflects the stakeholder ability to claim power and interest to your organization. Afterwards, write a brief rationale as to why you placed the stakeholder in the category you did.

Note: The organizations mission must take the players and context setters into account in some way, even if the organizations ultimate purpose is to serve the subjects or crowd.

BAT Stakeholder Names	Players	Context Setters	Subjects	Crowd
EX. Assistant Director: Student Center Union Board			x	
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				

<i>BAT Stakeholders</i>	<i>Rationale: Why did you mark the category as you did?</i>
EX. Assistant Director: Union Board	Needs cooperation with others to market Union Board programs and increase attendance.
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	

Power vs. Interest Grid (Group Activity)

Seven Steps





Note: *You will need two people to facilitate to complete the activity. One person to go over the BAT with the group. The second person will write on the note cards and place the labels on grid.*

1. The facilitator tapes four flip chart sheets to a wall to form a single surface two sheets high by two sheets wide.
2. The facilitator draws the two axes on the surface using a marking pen. The vertical axis is labeled interest from low to high; the horizontal axis is labeled power for low to high.
3. Planning team members brainstorm by writing the names of different stakeholders as they come to mind on a 1 ½ X 2-inch (2 ½ X 5-cm) self-adhesive label, one stakeholder per label. Alternatively, if the basic analysis technique has been performed, the names should be taken from that list.
4. The facilitator places each label in the appropriate place on the grid, guided by the deliberations and judgements of the planning group members. Labels should be collected in round-robin fashion, one label per group member, until all labels (other than duplicates) are placed on the grid or eliminated for some reason.
5. Labels are moved around until all group members are satisfied with the relative location of each stakeholder on the grid.
6. The group should discuss the implications of the resulting stakeholder placements.
7. The facilitator records the results of the discussion on flip chart sheets.

Stakeholder Influence Diagram

The stakeholder influence diagram indicates how the stakeholders on a power versus interest grid influence one another.

Instructions: Review your list of stakeholders from the Power vs. Interest Grid. Start on the left side of this worksheet and begin with the Player and Context Setter stakeholders. Now ask yourself, how does influence flow from the Players and Context Setters to the Subjects and the Crowd? What is the relationship among the stakeholders?

<i>Stakeholder Type</i>	<i>Stakeholder name</i>	<i>Direction of Influence</i>	<i>Stakeholder Type</i>	<i>Stakeholder Name</i>
EX. Player	VPSA		Subject	Asst. Director of Union Board
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				

Stakeholder Influence Diagram (Group Activity)

The stakeholder influence diagram indicates how the stakeholders on a power versus interest grid influence one another.

5 Steps

1. The team should start with a power versus interest grid and then, for each stakeholder on the grid, suggest lines of influence from one stakeholder to another.
2. The facilitator draws in the lines with a soft-lead pencil. Two-way influences are possible, but an attempt should be made to identify the primary direction in which influence flows between stakeholders.
3. Team members engage in a dialogue to determine which influence relationships exist, which are most important, and what is the primary direction of influence.
4. Once final agreement is reached, the pencil lines should be made permanent with a marking pen.
5. Team members discuss the results and implications of the resulting diagram, including identifying who are the most influential or central stakeholders.