**A Plan for Gathering Information from Internal and External Stakeholders**

(from: *Strategic Planning for Nonprofit Organizations;* Michael Allison, Jude Kay, CompassPoint Nonprofit Services)

# Data Collection from Internal Stakeholders—Board and Staff

|  |  |  |  |
| --- | --- | --- | --- |
| Internal Stakeholders | Outcome of contact with them?  Questions they can answer? What information do you want to gather from this stakeholder? | How best to involve them (such as surveys, discussions at regularly scheduled meetings, retreats, in- depth program evaluation worksheets,  etc.) | Details (this column may be filled out when starting to implement data collection phase: time frame and who is responsible for implementation) |
| Staff—do you want to engage:   * All of the staff * Management team * Some staff (specific) * Volunteer staff |  |  |  |
| Board of directors |  |  |  |
| Others—do you want to engage others (such as advisory board members, volunteer staff, etc.) |  |  |  |
| Department/programs |  |  |  |
| Specific individuals to be interviewed (such as director of finance, development director) |  |  |  |

**Data Collection from External Stakeholders—How to Involve External Stakeholders**

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| --- | --- | --- | --- | --- |
| (List specific names if possible) | Why talk with them?  Relationship building or information gathering, or both? | Outcome of contact with them?  Questions to answer? What information do you want to gather from this  stakeholder? | How best to involve stakeholder (i.e., questionnaires, interviews [face- to-face or phone], focus groups, meetings, etc.) | Details (this column may be filled out when starting to implement data collection phase: Time frame and who is  responsible for implementation) |
| Constituents/clients (current, past) |  |  |  |  |
| Institutional funders (foundations, corporations, government agencies) |  |  |  |  |
| Government officials |  |  |  |  |
| Organizations we partner with |  |  |  |  |
| Individual donors |  |  |  |  |
| Ex-staff, ex-board members |  |  |  |  |
| Other |  |  |  |  |

Which of the following documents would help provide important background information and/or inform your strategic issue decisions? (Check appropriate documents to assemble.)

|  |  |
| --- | --- |
| **Mission-related documents**   Program descriptions/workplans   Needs assessments   Client satisfaction surveys   Previous evaluation designs and results   Evidence of innovation/reputation in the field   Other data (such as government reports, etc.) | **Administrative capacity documents**   Mission, vision, values statements; strategic plan; annual plans   Program descriptions/workplans   Organizational chart   Internal newsletters or other communication vehicles   Personnel policies and performance appraisal forms   Previous organizational effectiveness surveys and/or “climate surveys” (or other formal review of culture and staff satisfaction)   Volunteer management plan   Information technology plan   Visual survey of facilities and equipment |
| **Financial-related documents**   Fund-raising materials   Fund-raising plans   Budget reports   Audit   Sample financial reports   Internal controls procedures manuals | **Governance documents**   Board minutes   Board roaster and committee structure   Previous board self-evaluations   Board manual |

**SWOT Analysis**

**(Strengths, Weaknesses, Opportunities, Threats)**

**Internal Scan - what’s going on in here?**

|  |  |  |
| --- | --- | --- |
|  | **Strengths** | **Weaknesses** |
| Service/Products |  |  |
| Culture/People |  |  |
| Leadership / Management |  |  |
| Systems/Processes |  |  |
| Finances |  |  |

**External Scan - what’s going on out there?**

|  |  |  |
| --- | --- | --- |
|  | **Opportunities** | **Threats** |
| Social |  |  |
| Technical |  |  |
| Economic |  |  |
| Political |  |  |
| Other |  |  |

**Developing Priorities Using the Results of the SWOT**

**Threats Opportunities**

|  |  |
| --- | --- |
| **Protective**  Using strengths to combat threats | **Development**  Using strengths to exploit opportunities |
| **Defensive**  To minimize the impact if threats materialize | **Alliance**  To use the strengths of others to exploit opportunities |

**Strengths**

**Weaknesses**

|  |  |  |
| --- | --- | --- |
| Protective | Strengths | Threats |
|  |  |  |
| Development | Strengths | Opportunities |
|  |  |  |
| Defensive | Weaknesses | Threats |
|  |  |  |
| Alliance | Weaknesses | Opportunities |
|  |  |  |