PLANNING FOR STAKEHOLDER ENGAGEMENT

Achieving Strategic Clarity program

Toolkit materials

This document contains readings and exercises to develop a stakeholder engagement plan to gather input on and build buy-in to your organization's intended impact and theory of change

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Introduction

Note to reader

Dear Nonprofit Leader:

Welcome to the *Planning for Stakeholder Engagement* toolkit! This toolkit is for teams interested in developing a stakeholder engagement plan to gather constructive feedback and build broader buy-in for their intended impact and theory of change. At the end of this toolkit, you will have a clear roadmap to engage different stakeholders that includes clear objectives, target engagement areas, talking points, activities, and owners for interactions with each stakeholder group.

This toolkit has been designed for one individual on the team, who we'll refer to as the "Toolkit Lead." The toolkit will provide guidance on how they can drive the process of developing a stakeholder engagement plan and, at each step, identify potential ways they could engage their broader team.

We've designed these materials so that you can either directly print a hard copies or use and share this version digitally. The digital version includes links to writable versions (Microsoft Word and PowerPoint) of the included exercise templates. To optimize the document for easy printing, some pages were left blank.

At any point, if you have any questions about these toolkits or suggestions on how they can be improved, please reach out to the Bridgespan Coaching team at AcceleratorCoach@bridgespan.org. We value and appreciate your input and are here to help!

We hope you will find this experience to be highly valuable for your team and look forward to hearing from you. All the best as you get started!

Sincerely,

The Bridgespan Leadership Accelerator team

About this toolkit

A relatively small group has been involved to date in the important process of developing your organization's intended impact and theory of change. Though you likely still have open questions about your Intended impact and theory of change (most organizations do), it is valuable to test and socialize these drafts with a broader group of stakeholders. We recommend starting with those who know your organization best, such as clients, staff, Board, funders, and partners.

These groups can be helpful thought partners in providing feedback on your overall draft and in helping you consider what changes it may imply for your work.

Additionally, in our experience, any degree of change can create ripples within your organization and broader community. Whether your intended impact and theory of change implies major shifts from your status quo, or more incremental changes, it will be important to be mindful and deliberate about how you engage with and communicate these changes to key internal and external stakeholders.

After completing the steps in this toolkit, your team will have a plan in place to engage key internal and external stakeholders that allows you to build broader buy-in and gather critical feedback, so you can strengthen and gain confidence in your intended impact and theory of change.

A robust stakeholder engagement plan typically answers the following questions:

- **Why** do you need a stakeholder engagement plan? **What** are your objectives?
- **Who** are the major audiences/key stakeholders that need to be engaged?
- **What** are the key messages to be shared with each stakeholder group and where do we want their input?
- **When** will communication take place, and how will it be sequenced?
- **How** will we engage various stakeholders (e.g. one-on-one meeting, email) and **who** should deliver the message?

We will take you through four steps that you can complete either as an individual or with your team:

- **Step 1:** Agree on your organization's objectives for stakeholder engagement
- **Step 2:** Revisit and refine your stakeholder list from Milestone 5
- **Step 3:** Determine key messages and topics for input from each group of stakeholders
- **Step 4:** Draft your stakeholder engagement plan

At each step, we'll give you guidance on what you need to do, ideas for how you can engage your team, examples from other organizations, and tools and templates to support you in your work.

Here is an example of the type of stakeholder engagement plan you might ultimately create. We'll share this complete example plan and supporting templates with you as a part of this toolkit.

Stakeholder engagement plan (example, 1 of 3 pages)

How will you engage stakeholders on your intended impact and theory of change drafts? Capture your thinking in the table below, using a different row for relevant stakeholders or stakeholder groups.

Stakeholder	Objectives	Format	Owner	Timing	Messaging
• *Who will we engage?*	• *What are our objectives for this engagement?*	• *What format will be used?*	• *Who will lead this effort?*	• *By when?*	• *What are the key messages we want to deliver, or key topics to discuss?*
Board of Directors	• Solicit feedback on overall strategy, and seek guidance on implications for programming and funding opportunities • Share major shifts for our target population implied by updates to intended impact and theory of change and gauge appetite and buy-in • Build buy-in for shift in target population and overall direction	• **With Board chair:** One-on-one conversation (standing quarterly call with CEO and Board Chair)	• CEO	• January (1/17)	• Messages as important tools for decision-making and strategic focus • Implies shift OF target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) • Seek input on how to communicate to broader Board, key funders, and important stakeholders • Seek input on potential operational and funding implications
		• **With full Board:** Board meeting (quarterly)	• CEO	• February (2/2)	• Messages as important tools for decision-making and strategic focus • Implies shift of target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) • Seek input on potential operational and funding implications • Solicit support in identifying and approaching high potential funders
Organizational leadership	• Solicit feedback on overall strategy • Seek guidance on implications for programming • Seek guidance on implications for operations and development strategy	• Biweekly program leadership check-in	• Director of Programs	• January	• Implies shift of target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) • Implies need to address certain programming gaps • Seek input on potential programmatic gaps to be addressed within existing services (or through additions)
		• Biweekly Ops and Development leadership check-in	• COO	• January	• Implies shift of target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) • Implies need to address certain programming gaps • Seek input on potential programmatic gaps to be addressed within existing services (or through additions)

Step 1: Agree on your objectives for stakeholder engagement

As an important first step to anchor your work, we'll ask you to consider why you want to engage internal and external stakeholders. Your goal for each stakeholder group will influence your approach to their engagement. Organizations choose to engage internal and external stakeholders on their draft intended impact and theory of change for a variety of reasons:

- To solicit feedback on their draft as a whole
- To solicit input on specific elements of their draft
- To gauge reactions to potential changes implied
- To inform and generate buy-in around planned changes

Your organization's goals for engagement will depend on your organization's starting point. What do we mean by this? We ask you to think about two questions:

1. **How certain are you about the intended impact and theory of change draft you've developed?** You may or may not have already invested in research to address critical open questions and refine your draft. If you are less certain about where you've landed, a key goal of your stakeholder engagement might include *soliciting input* related to specific aspects of your draft or the whole draft. If you are more certain, then your goals for stakeholder conversations might be more focused on *informing others* about planned changes.
2. **How significant are the changes implied by this draft?** If the changes you are considering are significant, an important objective around stakeholder engagement will be *gauging reactions* to these changes and eventually *generating buy-in* around changes that may be significant.

Depending on your organization's culture and goals related to inclusion, it might be especially important to engage staff and clients *more* in providing input on where the organization is headed.

Though your specific objectives and messaging will be tailored for specific stakeholder groups, we find it's helpful to take a step back and start by naming your organization's overall objectives for engaging stakeholders at this juncture. You will refine your objectives for specific groups (for example, your Board) during the next step.

Below are recommended activities you might complete to refine your goals for stakeholder engagement, which build on your learning so far. They include activities for you to complete as Toolkit Lead and options on how you might engage your broader team (if you think that makes sense for your organization and context).

Step 1 activity: Identify overall goals for stakeholder engagement	
Toolkit lead activity	**Reflect** on the following two questions about where your team is today with respect to your intended impact and theory of change draft: • *How certain* are you about the draft you've developed? • *How significant* are the changes implied by this draft? **Consider** the implications of this starting point. Based on where your organization is in this process, what are your *overall objectives* for engaging stakeholders? **Capture** your thoughts in the provided *Stakeholder Engagement Objectives Template* **RESOURCE:** Make edits directly to your existing template, or use the blank version provided on the next page to capture updates. For a writable, digital version, click HERE.
Team activity	*If you would like to engage your team...* Share the Step 1 content with your team and ask team members to complete the Toolkit Lead activity using the provided template. Share and discuss your responses during a live meeting or online.

Stakeholder engagement objectives TEMPLATE

Reflect on the following questions about where your team is today with respect to its intended impact and theory of change draft.

How certain are you about the draft you've developed?

How significant are the changes implied by this draft?

Based on where your organization is in this process, what are your overall objectives for engaging stakeholders?
As examples, this might include: (1) to solicit feedback on your draft as a whole; (2) to solicit input on specific elements of your draft; (3) to gauge reactions to potential changes implied; and (4) to inform and generate buy-in around planned change

Step 2: Revisit list of key stakeholders

Now that you've aligned on your broad objectives for engaging internal and external stakeholders, you will identify specific stakeholders you would like to engage as part of this process.

Your team began to discuss this during the Milestone 5 Team Summit discussion of the *Achieving Strategic Clarity* program, during which you identified key stakeholders to engage, agreed on why you should engage them, and anticipated how they might respond to your intended impact and theory of change drafts.

During this step, you'll revisit and make any changes to the list of stakeholders you prioritized in Milestone 5. These revisions should address any changes in your goals since that initial conversation to ensure your plan is focused on the most important stakeholders for achieving your objectives.

As a reminder, key stakeholder groups to consider include:

- Board of Directors
- Staff (may include various sub-groups)
- Constituents (clients, alumni)
- Funding partners
- Partner agencies
- Important friends or thought partners (e.g., a field leader you trust)

Step 2 activity: Confirm the stakeholders you will engage	
Toolkit lead activity	**Review** your *Stakeholder engagement TEMPLATE* from the Milestone 5 Team Summit discussion **Make adjustments** to your list of key stakeholders based on the overall objective for stakeholder engagement you outlined in Step 1, which may have changed since you first completed the template. Consider the following questions: • Which stakeholders are most important to engage, given your overall objectives? • Are there any stakeholders missing? • Are there stakeholders that should be removed or deprioritized? • What is your specific objective for engaging with each group? • How do you anticipate they will respond to your intended impact and theory of change draft? **RESOURCE:** If you do not have available the completed template from the *Achieving Strategic Clarity* program, use the template on the next page or click HERE for a writable, digital version.
Team activity	*If you would like to engage your team...* Complete the Toolkit Lead activity and then share the refined list of prioritized stakeholders with your team for review and feedback during a live meeting or online.

Stakeholder engagement TEMPLATE

How will you engage stakeholders to refine your draft?		
Stakeholder	**Goals for engagement**	**Potential response**

Step 3: Determine key messages and areas for input

You articulated your major objectives for engaging internal and external stakeholders during Step 1 and more detailed objectives for your specific stakeholder groups during Step 2. We now want to build on that thinking and consider what your objectives mean for the key messages you want to relay and for the topics requiring input from each stakeholder group. We'll also want you to consider what information you would need to share with each group to have a productive dialogue (for example, your draft intended impact and theory of change).

We have found it important for executive teams to be consistent in how they message this effort across stakeholders, so you'll also develop a set of overall talking points that can serve as the foundation for your communications with all stakeholders. These talking points might relate important context such as:

- **What is an intended impact and theory of change and how is it helpful?** For many individuals, the concept of intended impact and theory of change may be new. Invest upfront in sharing relevant context about what these tools are and how they are helpful. Sharing illustrative examples of draft intended impact and theory of change documents might be useful.
- **Why are we taking on this work now?** At the beginning of the *Achieving Strategic Clarity* program, you discussed as a team why you are developing or refining your intended impact and theory of change at this juncture. You may have surfaced some specific decisions this work would inform, or pain points this work might address. Sharing this rationale helps to articulate the urgency and importance of this work.
- **How was this draft developed?** The stakeholders you are engaging will want to understand the process behind the draft you are sharing, specifically what viewpoints and research are represented, to what extent this represents an initial versus already tested draft, etc. Articulating the process your team went through to get to this point can be helpful in bringing greater transparency and credibility to what stakeholders are viewing.
- **Why are we engaging you?** Depending on the stakeholder objectives you outlined in Step 2, the answer to this question might be similar or different for stakeholder groups. Be candid about why you are engaging this audience and don't sugarcoat your messaging if you are really *informing* them versus actively engaging them *for input.*

Change--even change for the better--can be disruptive and uncomfortable. If your draft intended impact and theory of change implies significant shifts for your organization, it will be important to prepare some general talking points that can help you help you articulate the case for change:

- **Why we are changing?** It can be helpful to first articulate your organization's status quo and why it won't get you to the impact you want to have. Where possible, share data or stories that bring to life and support the need for change.
- **Where we are going?** A lack of clarity around your destination can generate significant anxiety from stakeholder groups that may be impacted. Articulate a clear vision of the future. Speak in terms of the impact this will allow your organization to have, making sure terms are compelling, realistic, and grounded in your mission.

Below are sample talking points for you to reference as you develop your own.

Sample talking points

What is an intended impact and theory of change and how will this help?

- An intended impact defines the results your organization will hold itself accountable for achieving. It defines the WHO, WHERE and WHAT of your organization's impact: Who, and where, is your target population? What specific outcomes do you want to enable your target population to achieve?
- A theory of change lays out HOW your organization will uniquely achieve that impact: What approach or types of work will your organization undertake, and with whom? What makes your organization's approach uniquely powerful?
- Together, your intended impact and theory of change serve as the North Star guiding the work of your organization. While mission and vision statements are essential to an organization's work, they are typically too broad or aspirational to help with resource allocation decisions and trade-offs.
- These tools enable us to be more effective and efficient in making decisions. They also support communicating our work, so that everyone inside the organization (staff and board) can operate toward the same goal and objectives. Eventually, we might also use this to communicate our work externally.

Why are we taking on this work now?

- We have seen significant growth as an agency and will see further changes as we remain responsive to changing community needs.
- Because we have so many different programs and will continue to have opportunities to take on new work, we see articulating a concrete intended impact and theory of change as an important way to make sure--and show how--our work connects and that we are all ultimately working toward the same goals.

How was this draft developed?

- Our executive team has spent roughly the past four months developing this draft, iterating internally and getting input from a Bridgespan Coach.
- This also included dedicating significant time to surfacing open questions and "pressure-testing" our thinking. We also dedicated time to research a number of important questions, so that we could feel confident in our answer.
- What you see here is still a draft. One thing we found challenging was to agree on a target population and cohesive theory of change given the broad reach of our services. This is still something we are actively working to refine.

Why are we engaging you? *[Board example]*

- We believe that this group can provide valuable perspective given your deep knowledge in our organization's history and your individual expertise.
- We are also gathering feedback from our program directors and managers, as well as operations leadership.
- We are seeking your candid feedback on two main questions:
- As a Board member, how is this helpful to you for holding our organization accountable for impact? How could it be strengthened or made more specific?
- Overall, do you believe that the theory of change captures our organization's "secret sauce" across its range of programs? Why or why not? Is this compelling to you?

Step 3 activity: Develop talking points	
 Toolkit lead activity	*Note: There are two major activities in this step, which we've labeled Activity A and Activity B. Activity A is focused on developing shared talking points for all stakeholders, and Activity B is focused on developing tailored messaging and topics for input for each stakeholder group. We suggest that you engage your team during this step, so we have provided guidance on how you might do that below.* Activity A: Develop shared talking points for all stakeholders **Draft** a set of *shared* talking points for all internal and external stakeholders that build off of the sample talking points as you find helpful. Consider the following questions: • What is an intended impact and theory of change, and how will it help? • Why are we taking on this work now? • How was this draft developed? • Why are we changing? • Where are we going? Activity B: Developing messaging for each stakeholder group **Draft** a set of *specific messages* for internal and external stakeholders. Consider the following questions: • Why are we engaging this group? • Where are we seeking input (i.e. which specific topics)? • What if any additional messages are important to relay (keeping in mind how they may respond to your draft)? **RESOURCE:** Use the template on the next page or click HERE for a writable, digital version.
 Team activity	*Suggested ways to engage your team...* Activity A: Develop shared talking points for all stakeholders • Share your draft *shared* talking points for all stakeholders with the team for review and feedback during a live meeting or online (e.g. via Google Docs) Activity B: Develop messaging for each stakeholder group • Share the Step 3 materials with your team • Rather than completing the template for all stakeholders yourself, divide the work up across your team by assigning 1-2 stakeholder groups to each team member to populate specific talking points in the provided template

Planning for Stakeholder Engagement: Talking points template

General talking points (for all audiences)

What is an intended impact and theory of change, and how will it help?

Share context about what these tools are and how they are helpful. Providing illustrative examples of draft intended impact and theory of change documents might be useful.

Starter example:

- *An intended impact defines the results your organization will hold itself accountable for achieving. It defines the WHO, WHERE and WHAT of your organization's impact: Who, and where, is your target population? What specific outcomes do you want to enable your target population to achieve?*
- *A theory of change lays out HOW your organization will uniquely achieve that impact: What approach or types of work will your organization undertake, and with whom? What makes your organization's approach uniquely powerful?*
- *Together, your intended impact and theory of change serve as the North Star guiding the work of your organization. While mission and vision statements are essential to an organization's work, they are typically too broad or aspirational to help with resource allocation decisions and trade-offs.*
- *These tools enable us to be more effective and efficient in making decisions. They also support communicating our work, so that everyone inside the organization (staff and board) can operate toward the same goal and objectives. Eventually, we might also use this to communicate our work externally.*

Why are we taking on this work now?

Consider specific decisions you may have surfaced at the start of this process, or pain points this work might address.

How was this draft developed?

Briefly share the process you have gone through including the ways you pressure testing your thinking and brought in different viewpoints along the way. Also clearly articulate the extent to which you view this as more tested versus truly an initial draft.

Starter example:

- Our executive team has spent roughly the past four months developing this draft, iterating internally and getting input from a Bridgespan Coach.
- This also included dedicating significant time to surfacing open questions and "pressure-testing" our thinking. We also dedicated time to research a number of important questions, so that we could feel confident in our answer.
- What you see here is still a draft. One thing we found challenging was…. This is still something we are actively working to refine.

Why are we changing?

Describe your organization's status quo (and celebrate if there is great work going on!) but also articulate why it won't get you to the impact you want to have. Where possible, share data or stories that bring to life and support the need for change.

Where are we going?

Articulate a vision of the future. Speak in terms of the impact this will allow your organization to have, making sure terms are compelling, realistic, and grounded in your mission.

Audience-specific talking points (complete for each audience)

Why are we engaging this group?

Consider your goals for engagement. As an example, this may include: (1) soliciting input, (2) gauging reactions to changes, (3) informing and generating buy-in. Be transparent and don't sugarcoat the reality if engaging the group is about informing and not input.

Where are we seeking input (i.e. which specific topics)?

Be specific about whether you are seeking input on the whole draft or specific questions. Ideally articulate a few specific questions you want the audience to answer and reference your draft as appropriate.

What if any additional messages are important to relay?

Consider how the group might respond to your communications and what immediate needs or questions might surface. Some organizations find it helpful to create a list of "Frequently Asked Questions" (FAQs) document if they anticipate significant questions from one or multiple groups.

Step 4: Develop your stakeholder engagement plan

Now it's time to put what you've learned over the past few steps into practice and develop your organization's stakeholder engagement plan. Your stakeholder engagement plan will build on the objectives and key messages you created as a part of Steps 2 and 3.

For each stakeholder group we will ask you to think tactically about how you'll move forward in engaging stakeholders, considering the following dimensions:

- **Format:** *Which communication format would be most productive to engage them?* As an example, if the focus is around *gathering input*, a small group conversation or one-on-one interview might be helpful in supporting the desired two-way communication. If the focus is on *informing* and is largely one-way communication, a larger group setting, such as a Town Hall, might work well. If your draft is implying significant changes for specific staff or stakeholder groups, consider whether a separate and more intimate setting might be helpful. You might need to structure a separate opportunity or use existing forums (e.g. a CEO might meet with their Board Chair during their standard 1:1 monthly call, or use a quarterly Board meeting to speak with the full Board).
- **Owner:** *Who will lead and be accountable for engaging this stakeholder group?* Ideally, the individual owning a specific stakeholder group's communications should be someone who has an existing relationship and has established trust with that stakeholder group. Be mindful of any potential power dynamics between the messenger and stakeholder group, which could affect their comfort level or the candor of feedback you receive.
- **Timing:** *When should the engagement happen?* Consider the sequence to engage stakeholders and be mindful of any interdependencies between stakeholder communications. For example, you may want to engage your Board and staff to ensure they're onboard before communicating with funders or external partners. Leave the appropriate time to incorporate learnings or feedback into your messaging. You might also consider whether there are key influencers within the organization that you should engage and generate buy-in from earlier.

We have provided a blank template for you to use in developing your stakeholder engagement plan. We have also provided an example stakeholder engagement plan from another organization for your reference.

Step 4 activity: Build out a stakeholder engagement plan	
"Lower touch" team engagement activities	**Populate** the stakeholder engagement plan template for each stakeholder group. Be sure to review the provided guidance for each column. • Note: Use the outputs from your Step 2 and Step 3 activities to populate the columns titled "objectives" and "messaging" **Review** your complete stakeholder engagement plan, considering a few questions: • Does the order and timing of communication address interdependencies across stakeholder groups (e.g. getting buy-in earlier from some groups before connecting with others)? • Does this plan provide the space you will need as an executive team to share learnings and adapt your plan as required? • Is the outlined plan feasible given the owner's bandwidth and prior commitments? **Share** your full draft stakeholder engagement plan with your team for review and feedback during a meeting **RESOURCE:** Use the template and example on the next pages or click HERE for a writable, digital version.
"Higher touch" team engagement activities	**Share** Step 4 content with your team **Send** the *Stakeholder engagement plan TEMPLATE*, the completed *Stakeholder engagement objectives TEMPLATE* output from Step 2, and the *Stakeholder engagement talking points* from Step 3 to your team **Assign** individuals specific stakeholder groups. Ask them to populate the *Stakeholder engagement plan TEMPLATE* for these groups following the "lower touch" team engagement activities prompts **Review and agree** on the full draft stakeholder engagement plan as a team **RESOURCE:** Use the template and example on the next pages or click HERE for a writable, digital version.

Stakeholder engagement plan TEMPLATE

How will you engage stakeholders on your intended impact and theory of change drafts? Capture your thinking in the table below, using a different row for relevant stakeholders or stakeholder groups.					
Stakeholder	**Objectives**	**Format**	**Owner**	**Timing**	**Messaging**
• Who will we engage?	• What are our objectives for this engagement?	• What format will be used?	• Who will lead this effort?	• By when?	• What are the key messages we want to deliver, or key topics to discuss?

Stakeholder engagement plan TEMPLATE

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Stakeholder engagement plan (example, 1 of 3 pages)

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Board of Directors	• Solicit feedback on overall strategy, and seek guidance on implications for programming and funding opportunities • Share major shifts for our target population implied by updates to intended impact and theory of change and gauge appetite and buy-in • Build buy-in for shift in target population and overall direction	• **With Board chair:** One-on-one conversation (standing quarterly call with CEO and Board Chair)	• CEO	• January (1/17)	• Messages as important tools for decision-making and strategic focus • Implies shift OF target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) • Seek input on how to communicate to broader Board, key funders, and important stakeholders • Seek input on potential operational and funding implications
		• **With full Board:** Board meeting (quarterly)	• CEO	• February (2/2)	• Messages as important tools for decision-making and strategic focus • Implies shift of target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) • Seek input on potential operational and funding implications • Solicit support in identifying and approaching high potential funders
Organizational leadership	• Solicit feedback on overall strategy • Seek guidance on implications for programming • Seek guidance on implications for operations and development strategy	• Biweekly program leadership check-in	• Director of Programs	• January	• Implies shift of target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) • Implies need to address certain programming gaps • Seek input on potential programmatic gaps to be addressed within existing services (or through additions)
		• Biweekly Ops and Development leadership check-in	• COO	• January	• Implies shift of target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) • Implies need to address certain programming gaps • Seek input on potential programmatic gaps to be addressed within existing services (or through additions)

Source: Anonymized client example

Chicago YOUTH

> How will you engage stakeholders on your intended impact and theory of change drafts? Capture your thinking in the table below, using a different row for relevant stakeholders or stakeholder groups.

Stakeholder	Objectives	Format	Owner	Timing	Messaging
• Who will we engage?	• What are our objectives for this engagement?	• What format will be used?	• Who will lead this effort?	• By when?	• What are the key messages we want to deliver, or key topics to discuss?
All staff	• Build interest in and excitement for shifts implied by updates to intended impact and theory of change and relate to their priorities	• **With managers:** Set up designated meeting	• CEO and Director of Programs	• February	• Implies exciting shifts of: – Target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) – Certain programming to address key gaps • Seek input on potential programmatic gaps to be addressed within existing services (or through additions)
		• **With frontline staff:** Use monthly staff meeting for each program	• Program directors	• March	• Implies exciting shifts of: – Target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) – Certain programming to address key gaps • Seek input on potential programmatic gaps to be addressed within existing services (or through additions)
Funders	• Build interest in and excitement for shifts implied by updates to intended impact and theory of change and relate to their priorities	• **With Foundation X:** Set up dedicated meeting	• CEO and Development Director	• March	• Implies exciting shifts to better meet our mission – Target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) • Closely links to priorities of Funder A
		• **Department of Education:** Set up dedicated meeting	• CEO and Director of Programs	• March	• Implies exciting shifts to better meet our mission and mission of DOE – Target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) • Closely links to DOE priorities • Solicit input on target programming/services

Chicago YOUTH ③

How will you engage stakeholders on your intended impact and theory of change drafts? Capture your thinking in the table below, using a different row for relevant stakeholders or stakeholder groups.

Stakeholder	Objectives	Format	Owner	Timing	Messaging
• Who will we engage?	• What are our objectives for this engagement?	• What format will be used?	• Who will lead this effort?	• By when?	• What are the key messages we want to deliver, or key topics to discuss?
Clients	• Build excitement for shifts implied by updates to intended impact and theory of change • Solicit feedback and input, and provide opportunity to voice support and concerns	• Email communication and dedicated community forum	• Director of Programs and select program directors and managers	• April	• Implies exciting shifts to better meet our community's needs • Incorporates input from our community, but we want further feedback on how we can best live into this • Input on target programming/services
Partners	• Share IITOC and implications for the organization	• Set up dedicated meetings	• Directors of school programs	• April	• Implies exciting shifts to better meet our mission and mission of partner schools and DOE – Target population (prioritized focus on children ages 5-14, reduced focus on ages 15-18) • Closely links to DOE priorities • May mean shifts in which students we're able to support and how we work with partners • Solicit input on target programming/services and potential shifts to partner relationship