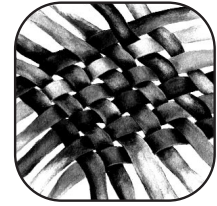


MODULE 6: INFORMATION GATHERING, PART 2: STAKEHOLDER PERCEPTIONS



Step One: Creating Your Inlusiveness Committee

Step Two: Training and Consultants

Step Three: Definitions and Case Statement

Step Four: Gathering and Analyzing Information

Step Five: Creating Your Inlusiveness Blueprint

Step Six: Implementation



MODULE 6: INFORMATION GATHERING, PART 2: STAKEHOLDER PERCEPTIONS

Overview of Content

This is the second of three modules that focus on information gathering and guide you through the process of mapping the existing landscape. In *Module 5*, you looked at **available facts** — objective information that already exists, but which you must pull together and record. Now, you will turn to **stakeholder perceptions**; here, you will ask specific groups for their thoughts about your organization related to inclusiveness and develop an in-depth plan for collecting stakeholder perceptions related to your organization and inclusiveness.

Specifically you will:

- Identify the internal and external stakeholders whose opinions you will seek regarding your organization's inclusiveness practices.
- Determine the specific questions and topics about which you will ask stakeholders.
- Determine which data collection tool (focus group, survey, or interview) is most appropriate.
- Determine who will be responsible for each data collection activity.
- Collect the data.

When doing these tasks, remember to differentiate between information that is important and information that is simply interesting.

For example, it might be interesting to get the opinions of media leaders regarding your organization in terms of inclusiveness matters, but unless your organization has a mission of media advocacy, these perspectives may not be critical to developing a plan to become more inclusive.

- If you fail to get perspectives from people of color who have worked with your organization, you will likely be overlooking an important piece of information that will be critical to creating an effective inclusiveness plan.
- It might be interesting to gather information about how your donors or members feel about the benefits they receive, but unless the questions are directly related to issues of inclusiveness, this is probably not critical to the information-gathering process.
- If you fail to ask your clients about the effectiveness of your staff in meeting the needs of communities of color, you will be missing information that will be important to your inclusiveness plan.

Step Four: Gathering and Analyzing Information

To keep the process manageable, consider limitations of time, funds, and availability of information.

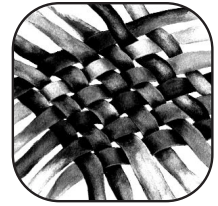
Who to Involve

The work in this module will be completed by the Inclusiveness Committee as a whole or in a smaller representative group.

Exercises to Complete

- *Exercise 6-A: Identifying Internal and External Stakeholders*
- *Exercise 6-B: Reviewing Information-Gathering Topics*
- *Exercise 6-C: Putting It All Together*
- *End-of-Module Checklist*

MODULE 6: INFORMATION GATHERING, PART 2: STAKEHOLDER PERCEPTIONS



Descriptions of Information-Gathering Tools

There are a number of different kinds of tools for collecting information about the thoughts and beliefs that different groups have about your organization. This workbook focuses on three: surveys, interviews and focus groups. You can use one or more, or a combination, of the following tools for different groups. Review the descriptions of the following tools, and keep them in mind as you work through this module. In *Exercise 6-C* you will specify which tool(s) you will use for different stakeholder groups.

For example, you may decide to use a *survey* to obtain staff's perceptions of your organization, a survey for a majority of your clients and individual *interviews* with randomly selected clients, and *focus groups* with your board.

Surveys

- Surveys can be widely disseminated and are the most time-efficient method of collecting information from respondents.
- People generally respond to surveys anonymously.
- Most surveys include some yes/no questions, some questions on a Likert Scale (a commonly used numerical rating scale) (e.g., rate on a scale of 1 to 5), and a few open-ended questions.
- The disadvantage of surveys is that you may need someone with fairly sophisticated computer skills to compile the information.
- If you have the resources, you may wish to use consultants to administer and analyze surveys.

Interviews

- Interviews are useful tools for gathering in-depth information from your stakeholders. Interviews are particularly valuable because they allow you to ask follow-up questions of interviewees when you need clarification about a particular response.
- However, it is easy to ask leading questions in an interview format. Therefore, it is important that the interviewers be careful to ask value-neutral questions. (An example of a leading question is, "Do you think people of color are disproportionately discriminated against?" Another way to ask that question is, "Are people of color and white people treated equally?")



“Men hate each other because they fear each other, and they fear each other because they don't know each other, and they don't know each other because they are often separated from each other.”

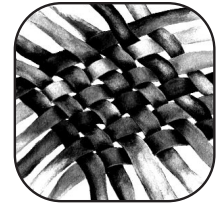
-Martin Luther King, Jr.

- It is also important that interviewers record the answers to questions carefully and that the full meaning of a response is recorded.
- A third party with experience conducting interviews is helpful for designing and leading interviews.

Focus Groups

- Focus groups are useful if you want to gather a lot of information from a group of stakeholders during a short period of time.
- A typical focus group has 8 to 15 people in it and lasts for approximately 90 minutes.
- The participants usually have some critical factor in common, e.g., they are all clients of the organization or they are all past board members.
- Focus groups are generally conducted by a third party. The sponsoring agency is usually not present for the focus group so that respondents will be more frank with their responses.
- Organizing a focus group requires the following:
 - Deciding who should be invited.
 - Securing an appropriate space (consider special needs, such as translators and accessibility).
 - Getting guests to the designated location.
 - Identifying a facilitator with experience conducting focus groups.
 - Ensuring that someone is there who can record responses.
 - Analyzing responses.

If you have a large budget, firms that specialize in doing market research can help you organize a focus group. If you have a small budget, someone in your organization may be able to manage the logistics of organizing a focus group. Then you can hire an experienced consultant to facilitate or get a professional to donate his or her services. Because of the importance of having an unbiased facilitator, avoid doing a focus group if you do not have money to hire an outside consultant to conduct the focus group – or the ability to work with a pro bono professional facilitator.



Resources for Data Collection

Online resources can help you to survey your staff, volunteers, clients, or board members. We do not specifically endorse any particular product.

www.surveymonkey.com

This website allows organizations to collect survey data for free, or for a low monthly cost, depending upon the length of the survey and number of respondents. Data is then automatically tallied and can be analyzed through charts or graphs.

www.zoomerang.com

This website allows users to create online surveys and analyzes results. Several different memberships levels are offered, including a free basic membership for shorter surveys and a discounted nonprofit membership.

Other software programs and websites are also available; find them by entering “survey tools” into a search engine.

Other resources to aid you in data collection include local universities, through which you may be able to connect with graduate students who are interested in working with you for credit or for a lower cost.

Note for Organizations Interested in Addressing Other Diverse Communities

As you think about questions to ask survey or interview respondents, you may decide to inquire about backgrounds so that you can look at responses from different groups. For example, if you’re interested in understanding how well your organization addresses issues of ability, it might be helpful to ask whether your respondent is mentally or physically disabled. Note, however, that sometimes these kinds of questions can be perceived as invasive, so think carefully about the information that is really important. For example, it may or may not be appropriate to ask about individuals’ socio-economic backgrounds (i.e., upper class, middle class, lower-income, poor). Similarly, you may or may not feel comfortable asking people about their sexual orientation.

The exercises will take you through the process of identifying which groups’ perspectives you want to collect, the topics and questions you would like their opinions about, and the mechanisms you will use to collect their perceptions. As you work through this module, think carefully about whose perceptions and which topics will be most useful to your organization’s particular needs and inclusiveness work.

Complete Exercises 6-A: Identifying Internal and External Stakeholders, 6-B: Reviewing Information-Gathering Topics, and 6-C: Putting It All Together.

Track your progress in completing Module 6 on the *End-of-Module Checklist*, located after the exercises.

Module 6: Information Gathering Part 2, Stakeholder Perceptions

The CHC Inclusiveness Committee discusses how to collect stakeholder perceptions.

A month later, members of the Inclusiveness Committee reported back from their teams about the results of the information-gathering process. Trevor and Melody did a presentation on the best practices of other community health clinics from similar-sized cities. They were excited about what they found, including a model program in Dallas, Texas, which had recruited Spanish-speaking volunteers to serve as greeters in a clinic's waiting room. The greeters would then meet briefly with the nurse or doctor before the patients entered the examining room. It turned out that the patients described their symptoms more extensively to a peer than to their physician.

"Thanks, Trevor and Melody," said Joe. "That was great information."

"You're so right," said Luisa. "I'm going to try out that greeter method soon!"

"Good," said Ed. "Now we move on to stakeholder perceptions. Did everyone have a chance to read about this in the workbook?"

"I did," said Melody. "But I still don't understand exactly what they are."

"Stakeholders are the people who are involved in the clinic," explained Ed. "Anyone - staff, Board, volunteers, donors, patients. And when we talk about their perceptions, we're just asking people what they think."

"That's important, especially to me," said Eleanor. "We call it market research."

"Sure, I guess you could call it that," said Ed. "Except that in this case, we're asking people about their opinions on CHC's inclusiveness. Our first step is to identify the audiences or stakeholders we want to target. How about if you all start calling out some possibilities?"

The group came up with staff, Board, patients and their families, clinician volunteers, fundraising volunteers, and donors. Ed filled in the information on the worksheet provided in the inclusiveness workbook.

"How about other community leaders?" asked Marcie. "Some of them seem to be on top of this, as much as they talk about it in Chamber of Commerce meetings."

"Good idea," said Ed. "Okay, now it's time to think about how we'd like to get information from these groups. You have three ways of asking them for their feedback: surveys, focus groups, and interviews. Have you all had a chance to read about the different methods?"

Everyone nodded. "Surveys seem like the quickest way to get feedback," said Hector.

"It's quick, but it's not very deep," said Eleanor. "Interviews give you a chance to really probe on particular topics."

"Since the gathering of available facts took a little longer than we'd hoped, maybe we could start with surveys and do interviews or focus groups with audiences we need more information from," said

Trevor. “And yeah, yeah, I know it was me who held things up.”

“Trevor, that’s a great idea,” said Luisa. “And I know just the group who needs more than a survey. Our patient families! Many of them don’t read or write in English.”

“So would interviews or a focus group be better for them?” asked Ed.

“I think a focus group,” said Luisa. “They could share ideas and problems with each other, and it might help them open up more to be in a group.”

“There’s one more audience we should consider for something more in-depth,” said Beth. “The Board.”

“Of course, you’re right,” said Joe. “How about interviews for the Board? Though we made some progress in the last meeting, I think they get a little timid when they’re together in the Board room, at least on this subject.”

“Okay,” said Ed. “Let me summarize. You want to do surveys for the staff, volunteers, community leaders, and donors, a focus group for patient families, and interviews for the Board. Is that right?”

“Sounds good,” said Joe, as everyone nodded around the table. “Now, who’s going to take this on?”

“I’ll work on the focus groups,” said Luisa. “But I might need an outside person to help. Ed, do you speak Spanish?”

“Un poquito,” said Ed. “But I’m not fluent enough for this purpose. I have a colleague who works with me who could do a bilingual focus group.”

“And Beth, Jeff, I’d like to do the Board interviews,” said Eleanor. “If you think they’ll give me honest answers.”

“Eleanor, I think you’d be perfect. They know you and you’ve been here for some time. Given my personal story at the last meeting, they would probably be less honest with me,” said Beth. Jeff agreed.

“Great, now we just need someone to work on the surveys,” said Ed.

“I’ll do it,” said Hector. “I’ll need all of your input on the questions, of course, but I have a Survey Monster membership and could do it all on-line.” The group agreed, and spent some time identifying the topics for each audience and crafting the questions.

Over the next six weeks, Hector developed and piloted the survey with staff, then sent it out to the other stakeholders, thanks to Melody’s help gathering e-mail addresses. Luisa worked with Manuela Rodriguez, an associate of Ed’s, to accomplish the patient/family focus group. Finally, Eleanor conducted interviews with the Board, most of them in person. “It gave me a chance to make a good connection with each person,” she noted. The trio presented their findings to the Inclusiveness Committee.

“Now we have to pull all of this information together,” said Joe.

EXERCISE 6-A

Identifying Internal and External Stakeholders

Internal stakeholders are people who are already committed to serving your organization as board members, staff, volunteers, and/or donors. External stakeholders are people who are impacted by your work as clients/constituents, community partners, and others. It is important to get the perspectives of both groups.

Instructions:

Mark the groups whose perspectives you think will be useful for creating an inclusiveness plan.

Internal Stakeholders

- | | |
|---|--|
| <input type="checkbox"/> Board members | <input type="checkbox"/> Former Volunteers |
| <input type="checkbox"/> Former board members | <input type="checkbox"/> Donors |
| <input type="checkbox"/> Staff members | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Former staff members | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Volunteers | <input type="checkbox"/> Other _____ |

Use the space below to make notes regarding the internal stakeholders you've chosen: (e.g., topics you might ask about, approximate number of people in the group, key individuals to interview)

continued

EXERCISE 6-A: Identifying Internal and External Stakeholders *continued*

External Stakeholders

- | | |
|--|--------------------------------------|
| <input type="checkbox"/> Clients | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Community partners | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Leaders of color from nonprofit,
public, or private sectors | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Members of groups served by our
organization who are not accessing
our services | |

Use the space below to make notes regarding the external stakeholders you've chosen:

Date Exercise Completed _____

EXERCISE 6-B

Reviewing Information-Gathering Topics

The information-gathering topics/questions on the following pages may be presented in a variety of formats (e.g., surveys, interviews, and focus groups). The structure of the topics/questions may need to be slightly altered for any particular format. All questions should be narrowed and adapted for your organization's purposes and specific needs.

Instructions:

- *Review the following information-gathering topics and questions.*
- *Based on your ranking in Exercise 5-E: Selecting Facts About Your Organization of topics/categories as "high priority" or "low priority," refer to the topics and associated questions in this exercise that correspond to your organization's high priorities.*
- *Choose the questions in each high priority topic that will be useful for your organization.*

In *Exercise 6-C* you will match topics of interest to particular formats (e.g., surveys, interviews, or focus groups), to stakeholder groups (e.g., clients, staff, donors, etc.), and to people who will be responsible for implementing each information-gathering activity.

continued

EXERCISE 6-B: Reviewing Information-Gathering Topics *continued*

Topic 1: Mission and Organizational Values

As of _____ (today's date) and based on your work in *Exercise 5-E: Selecting Facts About Your Organization*, the category Mission and Organizational Values is of (check one):

- low priority
 high priority

If a high priority, choose questions (from the following) to include in your information gathering:

- (1) How, if at all, does the organization's mission statement address inclusiveness?
- (2) How does the mission of the organization impact communities of color?
- (3) How do communities of color respond to the mission of the organization?
- (4) How, if at all, does the organization's values statement address inclusiveness?
- (5) In what ways are the values that have been adopted by the organization consistent with the values that are *practiced* in relation to inclusiveness?
- (6) How might the mission statement be changed to improve inclusiveness?
- (7) How can the organizational values be expanded or modified to improve inclusiveness? What would the new values be?

continued

EXERCISE 6-B: Reviewing Information-Gathering Topics *continued*

Topic 2: Board of Directors

As of _____ (today's date) and based on your work in *Exercise 5-E: Selecting Facts About Your Organization*, the category board of directors is of (check one):

- low priority
 high priority

If a high priority, choose questions (from the following) to include in your information gathering:

- (1) What is the organization's process for recruiting people of color to serve as directors? Is the process formal or informal? How effective is the process?
- (2) Does the organization have a written affirmative action plan or equal employment opportunity policy? If yes, what effect does the plan have on recruiting board members?
- (3) How is the current level of diversity on the board different from or similar to its level of diversity in past years? Is the board more or less diverse than in the past? When and why did changes occur?
- (4) What is the board's opinion about requiring directors to support the organization financially? Has this opinion, or could this opinion, influence the organization's ability to recruit and retain people of color as directors?
- (5) What do people of color report about their experience serving as members of the board of directors? What has been their comfort level in serving the organization in this capacity?
- (6) How does the tenure of people of color compare with the tenure of white people serving on the board of directors?
- (7) To what extent does the board of directors consider issues relating to race and ethnicity when it sets policies and makes decisions for the organization?

continued

EXERCISE 6-B: Reviewing Information-Gathering Topics *continued*

Topic 2: Board of Directors *continued*

- (8) What formal and informal mechanisms are in place to guarantee that the operating policies of the organization are sensitive to issues regarding race and ethnicity?
- (9) Does the organization have any advisory committees to provide feedback and guidance about programs, services, or initiatives to reach people of color? If yes, describe the impact that the advisory committees have on inclusiveness practices.
- (10) Has the board recently undergone inclusiveness and/or diversity training or education? If yes, describe the effect training had on inclusiveness practices?
- (11) What could the board of directors do differently to become more inclusive?
- (12) What could the board of directors do differently to address the needs of communities of color?

continued

EXERCISE 6-B: Reviewing Information-Gathering Topics *continued*

Topic 3: Personnel

As of _____ (today's date) and based on your work in *Exercise 5-E: Selecting Facts About Your Organization*, the category Personnel is of (check one):

- low priority
 high priority

If a high priority, choose questions (from the following) to include in your information gathering:

- (1) Does the organization have a formal or informal process for recruiting people of color for the staff? If yes, is it effective? Please explain.
- (2) Are explicit or strategic efforts made to hire staff who possess knowledge of and experience with diverse communities/issues? Please describe.
- (3) Describe how well the organization has been able to retain staff members of color, considering successes and challenges related to retention. Are there differences in the organization's past success in retaining white staff members versus staff members of color?
- (4) How frequently does the staff openly discuss benefits and barriers to working across cultures?
- (5) To what extent does the organization provide training to help staff work with people from different backgrounds? Please describe.
- (6) What improvements could be made, if any, in staffing and/or staff training to help the organization work with different communities of color?
- (7) What is the organization's history in recruiting and promoting people of color and white people with similar professional backgrounds and skills equally?

continued

EXERCISE 6-B: Reviewing Information-Gathering Topics *continued*

Topic 3: Personnel *continued*

- (8) To what extent does the human resources department take an active role in recruiting people of color? Please describe.

- (9) Does the organization make inclusiveness trainers/consultants available to help staff understand and operate more effectively within a diverse cultural context? If yes, please describe.

continued

Topic 4: Organizational Culture

As of _____ (today's date) and based on your work in *Exercise 5-E: Selecting Facts About Your Organization*, the category Organizational Culture is of (check one):

- low priority
 high priority

If a high priority, choose questions (from the following) to include in your information gathering:

- (1) How and to what extent does the organization welcome and accept all employees regardless of race or ethnicity?
- (2) How does the organization ensure that all staff members are given equal opportunity to voice their concerns and comments about the work environment without repercussions?
- (3) How does the organization welcome discussion pertaining to race and ethnicity in the workplace and/or in the organization's work?
- (4) How does the organization respond to concerns and comments about the work environment in a respectful and timely manner?
- (5) To what extent are ethnic/racial jokes in the workplace tolerated?
- (6) To what extent does the organization demonstrate flexibility with staff who have limited English language skills?
- (7) How does the workplace environment reflect appreciation for diverse racial/ethnic groups?
- (8) What are three things that you value and would not change about the organizational culture?

continued

EXERCISE 6-B: Reviewing Information-Gathering Topics *continued*

Topic 4: Organizational Culture *continued*

- (9) What three things would you change about the organizational culture? Why?
- (10) To what extent are people of diverse racial/ethnic backgrounds comfortable working at the organization?
- (11) Are there any unspoken rules or assumptions that may affect the work environment related to race and ethnicity?

continued

EXERCISE 6-B: Reviewing Information-Gathering Topics *continued*

Topic 5: Volunteers and Helpers

As of _____ (today's date) and based on your work in *Exercise 5-E: Selecting Facts About Your Organization*, the category **Volunteers and Helpers** is of (check one):

- low priority
 high priority

If a high priority, choose questions (from the following) to include in your information gathering:

- (1) Are efforts made to have volunteers and helpers reflect the racial and ethnic diversity of the community the organization serves? Please describe.
- (2) Are training programs offered for volunteers and helpers to help them work more effectively with communities of color? If yes, please describe.
- (3) How are clients, especially clients of color, encouraged to volunteer for the organization?
- (4) Does the organization actively recruit community members of color to serve on program-related committees? If yes, please describe.
- (5) To what extent do volunteers and helpers of color feel valued within the organization?

continued

EXERCISE 6-B: Reviewing Information-Gathering Topics *continued*

Topic 6: Programs and Constituents

As of _____ (today's date) and based on your work in *Exercise 5-E: Selecting Facts About Your Organization*, the category Programs and Constituents is of (check one):

- low priority
 high priority

If a high priority, choose questions (from the following) to include in your information gathering:

- (1) How is the community reflected in the clients who regularly use the services of the organization?
- (2) What kind of efforts are made to have clients reflect the racial/ethnic diversity of the broader community surrounding the organization or which the organization serves? Please describe.
- (3) In what ways does the organization have knowledge about the social service, educational, health, or other relevant needs within communities of color in your service area?
- (4) In what ways does the organization generally have knowledge about the common beliefs, customs, norms, and/or values of communities of color in your service area? Please describe.
- (5) Does the organization specifically consider race/ethnicity and/or culture in designing and implementing programs? Please describe.
- (6) Describe how the organization determines whether or not potential constituents within the community are being served or reached. Are these methods effective?
- (7) List the programs/services the organization provides that meet the community's needs and interests. How do you know they meet the community's needs and interests? Do these programs/services meet the needs of some sections of the community better than other sections?

continued

EXERCISE 6-B: Reviewing Information-Gathering Topics *continued*

Topic 6: Programs and Constituents *continued*

- (8) In what ways does the organization's location and facilities tend to encourage or discourage use of services and facilities by people of color? Please explain.
- (9) Does the organization make services available in geographic locations that are convenient and accessible to communities of color? Please describe.
- (10) Is there anything that the organization does to hinder providing services to people of color? Please explain.
- (11) Does the organization review practices, procedures, and services to determine their relevance to communities of color? How often? Please describe.
- (12) Is information on the ethnicity or culture of clients recorded in the organization's information management system? Please describe.
- (13) To what extent does the organization have the capacity to serve non-English-speaking constituents? What languages do staff members and volunteers speak fluently?
- (14) Does the organization translate materials into languages that reflect diverse communities in your service area? Please describe, including the languages used.
- (15) How well does the organization serve people of color? Please explain.
- (16) What specific program policies changes would improve services provided to communities of color?

continued

EXERCISE 6-B: Reviewing Information-Gathering Topics *continued*

Topic 7: Marketing and Community Relations

As of _____ (today's date) and based on your work in *Exercise 5-E: Selecting Facts About Your Organization*, the category Marketing and Community Relations is of (check one):

- low priority
 high priority

If a high priority, choose questions (from the following) to include in your information gathering:

- (1) How does the organization gather information from communities of color regarding the organization, its services, and the needs of these communities? How effective and comprehensive are these methods for soliciting information?
- (2) Does the organization solicit input from individuals or organizations that can provide information regarding culturally related issues? Please describe.
- (3) Does the organization reach out to any of the following types of groups?
 - Religious groups with ties to communities of color
 - Ethnic media sources
 - Organizations that serve people of color
 - Cultural or Native American tribal organizations
 - Businesses serving communities of color
 - Fraternal organizations in communities of color
 - Other _____If "yes" to any of the above, please describe.
- (4) Does the organization participate in cultural, political, religious, or other events or festivals sponsored by or designed for communities of color? Please describe.
- (5) Are people of color depicted in organizational materials? If yes, please describe.

continued

EXERCISE 6-B: Reviewing Information-Gathering Topics *continued*

Topic 7: Marketing and Community Relations *continued*

- (6) How is the organization viewed by communities of color?
- (7) What is the organization's community reputation in regards to inclusiveness and/or communities of color? To what extent is this reputation based on the organization's communications, activities, and/or policies?
- (8) What barriers or problems prevent the organization from successfully communicating and working with communities of color?
- (9) What could be done through community and public relations, outreach, and/or communications/marketing to improve the organization's ability to work with communities of color?

continued

EXERCISE 6-B: Reviewing Information-Gathering Topics *continued*

Topic 8: Fundraising and Membership

As of _____ (today's date) and based on your work in *Exercise 5-E: Selecting Facts About Your Organization*, the category Fundraising and Membership is of (check one):

- low priority
 high priority

If a high priority, choose questions (from the following) to include in your information gathering:

- (1) Describe the racial/ethnic breakdown of the organization's donor base.
- (2) What is the prevailing attitude internally regarding the role of people of color in providing financial support to the organization?
- (3) To what extent do fundraising materials and marketing strategies reflect the needs and interests of all racial/ethnic groups? Please explain.
- (4) What is the level of participation and representation of people of color at fundraising events? Please explain.
- (5) To what extent and in what capacity are people of color involved with designing fundraising events? Please explain.

EXERCISE 6-C

Putting it All Together

Instructions:

- *Using the results of Exercise 6-A, list the groups from whom you want to get information in column 1 of the table below. Include internal and external stakeholder groups.*
- *Using the results of Exercise 6-B, list the topics about which you want to gather information in column 2 of the table below. Remember that within each topic you can narrow the list of questions so that you only ask the questions that are relevant to your organization. You can also add to the list if there are questions you want to ask that are not included in a particular topic.*
- *Decide which of the three basic tools you will use to gather information from stakeholders (surveys, interviews, or focus groups), and record your selections in column 3. Remember to think seriously about how much information you need and to discriminate between what is important and what is simply interesting. It takes organizational resources (time, money, and energy) to complete information gathering and you want to be sure that resources are expended wisely.*
- *Decide who will administer/implement each information-gathering activity and record name(s) of person(s) responsible in column 4.*

continued

EXERCISE 6-C: Putting It All Together *continued*

Example

<p>1. Whose opinions will you solicit? (internal and external stakeholders) From Worksheet 6-A</p>	<p>2. Which topics will you focus on? (mission, governance, personnel, culture, volunteers, programs/clients, community relations, fundraising) from Exercise 6-B</p>	<p>3. What data collection tools will you use? (surveys, interviews, focus groups)</p>	<p>4. Who will be responsible for getting the task completed? (a consultant, someone on your staff, board, etc.)</p>
<p><i>Example 1: Board members</i></p>	<p><i>Mission, governance, programs/clients, community relations</i></p>	<p><i>Survey full board</i> <i>Interviews with representative sample of board (max. 6 total)</i></p>	<p><i>Survey: Inclusiveness Committee</i> <i>Interviews: John Doe, Consultant</i></p>
<p><i>Example 2: Clients</i></p>	<p><i>Programs and clients, community relations</i></p>	<p><i>Survey</i></p>	<p><i>Inclusiveness Committee</i></p>

continued

EXERCISE 6-C: Putting It All Together *continued*

<p>1. Whose opinions will you solicit? (internal and external stakeholders) From Exercise 6-A</p>	<p>2. Which topics will you focus on? (mission, governance, personnel, culture, volunteers, programs/clients, community relations, fundraising) from Exercise 6-B</p>	<p>3. What data collection tools will you use? (surveys, interviews, focus groups)</p>	<p>4. Who will be responsible for getting the task completed? (a consultant, someone on your staff, board, etc.)</p>

Date Exercise Completed _____

END-OF-MODULE CHECKLIST

Module 6

<i>Action Item</i>	<i>Date Completed</i>	<i>Notes</i>
Identify internal and external stakeholders.		
Prioritize information-gathering topics.		
Create a work plan for gathering stakeholder perceptions (what data to gather, from whom, by whom, using what tools).		
Complete work plan.		