



## Marin County Office of Education: Leadership and Stakeholder Engagement



## Key Implementation Activities






### Commit to—or clarify—your vision

Establish a clear and compelling vision of what you plan to accomplish. What are some of the things you will see happening when you finally achieve your vision? How will you know when you've arrived?



### Adopt evidence-based strategies

Make smart choices about both the "what" and "how" of implementation. Are you taking actions that have contributed to success in similar endeavors? What relevant examples or other data do you have to guide your efforts? Do you have clear, effective, and efficient processes for getting to your vision?



### Strengthen and expand leadership

Clarify leadership roles and make sure leaders are working in their areas of strength. Some leaders motivate others to action during times of change. Some are excellent project managers and negotiators. Others are able to navigate difficult political and bureaucratic systems. Who are your leaders? What are their strengths and limitations? How can they best work together to support change?



### Engage critical stakeholders

Bring the right people to the table at the right time(s), and be clear about the contributions you are asking them to make. Who needs to be involved in order for you to achieve your vision? What will they need to learn, share, or do? Who is likely to resist or criticize this work? What can you do to make this vision more valuable or accessible to them?



### Map out activities in stages

Clearly map out the short- and long-term activities needed to achieve your vision. What shorter-term successes will make a difference for morale? What type of work plan or calendar will you design to track your progress? How will you communicate with stakeholders about progress?



### Practice evidence-based reflection

Engage your core work team in explicit continuous improvement practice. When and how often will you meet to discuss successes and challenges? What perception, process, and outcome data will you use to document progress and guide decision-making? How will you ensure that stakeholders are included?



### Set realistic deadlines

Balance ambition with pragmatism when you develop timelines; be accountable for the deadlines you set, but acknowledge capacity limitations and obstacles. Which deadlines are most critical or difficult to change? What will happen if deadlines are missed? When should timelines be revised and who should be notified?



### Communicate broadly, early, and often

Be clear about your purpose and intended audience before developing communication strategies. What do stakeholders care about most? What message will speak to these interests? What existing communication systems will allow you to communicate effectively with stakeholders? Who or what might be missed if you only rely on existing communication systems?



### Address systemic issues and barriers

Anticipate potential challenges as you prepare implementation strategies. What steps can you take to build political and operational support? How can necessary resources be maintained over time? What political or personnel changes might have a negative impact on this work? How can you prepare for this?

CALIFORNIA COMPREHENSIVE CENTER | NEW INITIATIVE IMPLEMENTATION CHEAT SHEET

## Key Implementation Activities

**New Initiative Implementation CHEAT SHEET**

**CALIFORNIA COMPREHENSIVE CENTER** | WestEd

**Commit to—or clarify—your vision**  
Establish a clear and compelling vision of what you plan to accomplish. What are some of the things you will see happening when you finally achieve your vision? How will you know when you've arrived?

**Adopt evidence-based strategies**  
Make smart choices about both the "what" and "how" of implementation. Are you taking actions that have contributed to success in similar endeavors? What relevant examples or other data do you have to guide your efforts? Do you have clear, effective, and efficient processes for getting to your vision?

**Strengthen and expand leadership**  
Clarify leadership roles and make sure leaders are working in their areas of strength. Some leaders motivate others to action during times of change. Some are excellent project managers and negotiators. Others are able to navigate difficult political and bureaucratic systems. Who are your leaders? What are their strengths and limitations? How can they best work together to support change?

**Engage critical stakeholders**  
Bring the right people to the table at the right time(s), and be clear about the contributions you are asking them to make. Who needs to be involved in order for you to achieve your vision? What will they need to learn, share, or do? Who is likely to resist or criticize this work? What can you do to make this vision more valuable or accessible to them?

**Map out activities in stages**  
Clearly map out the short- and long-term activities needed to achieve your vision. What shorter-term successes will make a difference for morale? What type of work plan or calendar will you design to track your progress? How will you communicate with stakeholders about progress?

**Practice evidence-based reflection**  
Engage your core work team in explicit continuous improvement practice. When and how often will you meet to discuss successes and challenges? What perception, process, and outcome data will you use to document progress and guide decision-making? How will you ensure that stakeholders are included?

**Set realistic deadlines**  
Balance ambition with pragmatism when you develop timelines; be accountable for the deadlines you set, but acknowledge capacity limitations and obstacles. Which deadlines are most critical or difficult to change? What will happen if deadlines are missed? When should timelines be revised and who should be notified?

**Communicate broadly, early, and often**  
Be clear about your purpose and intended audience before developing communication strategies. What do stakeholders care about most? What message will speak to these interests? What existing communication systems will allow you to communicate effectively with stakeholders? Who or what might be missed if you only rely on existing communication systems?

**Address systemic issues and barriers**  
Anticipate potential challenges as you prepare implementation strategies. What steps can you take to build political and operational support? How can necessary resources be maintained over time? What political or personnel changes might have a negative impact on this work? How can you prepare for this?

CALIFORNIA COMPREHENSIVE CENTER | NEW INITIATIVE IMPLEMENTATION CHEAT SHEET

## Change Leadership Mindset

- Multiple dimensions of leadership  
Technical and Adaptive
- Followers required, not optional
- Leadership and management are related, but mutually exclusive  
Management = Direction  
Leadership = Direction with purpose and inspiration

## 6 Principles for Leading Adaptive Change\*

1. Get on the balcony (get enough distance to see the "big picture")
2. Identify and communicate the change(s) needed
3. Regulate distress (maintain momentum without anxiety)
4. Maintain disciplined attention
5. Give work back to people
6. Protect voices of leadership from below (including new and dissenting voices)



\* Heifetz, R. A. & Laurie, D. L. (1997). *The Work of Leadership*. Cambridge, MA: Harvard Business Review.


## Leadership and Management

You manage things; you lead people.

~Grace Murray Hopper

Leader	Manager
Innovates	Administers
Develops	Maintains
Focuses on People	Focuses on Systems
Asks "What" and "Why"	Asks "How" and "When"
Initiates Change	Supports Stability
Shapes Culture	Reinforces Culture
Persuades	Coordinates
Inspires	Organizes






## Section 1

# Stakeholder Contributions

## Begin with the Right People!



- a) Stakeholder Selection:
  - Who selects? Is there a process?
- b) Critical stakeholder diversity:
  - Open minded—growth mindset
  - Relevant experience
  - Trusted
  - Implementation skills
  - Subject-matter expertise
  - Facilitation skills
  - Directly impacted by decisions
  - Champion/cheerleader
  - Administrative task support
  - Constructive critic
- c) Member Availability:
  - For meetings
  - For doing the work
  - For unanticipated events

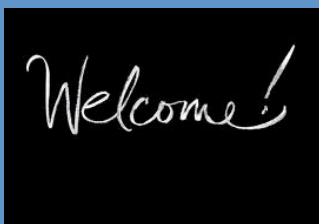
## Clarify Stakeholder Roles and Expectations

What will stakeholders do?  
What authority will they  
have?


Will they ...

- Generate ideas?
- Provide input?
- Interpret/analyze data?
- Propose strategy?
- Make critical decisions?
- Build relationships?
- Actively implement?

## Plan to Orient New Stakeholders




- a) Clarify expectations and roles.
- b) Develop 'quick start' orientation materials.
- c) Ask veteran stakeholders to act as mentors and provide updates.
- d) Encourage new stakeholders to ask questions and share perceptions.
- e) Ask new members to do something they are comfortable with ASAP.



### Team Activity


## Write a 'Help Wanted' Ad for Key Stakeholders

1. What stakeholder strengths will help you achieve your purpose?
2. Who will lead this process? With what skills?
3. Who else needs to stay informed? What are some of the political sensitivities you may need to address with them?



## Section 2

# Mapping Stakeholders




**CALIFORNIA**  
COMPREHENSIVE  
CENTER

Umoja

## How Do You Learn More About Your Stakeholders?

- What are their priorities?
- How do they view the world?
- What skills do they bring?
- What do they care about most?
- What is their relationship to other stakeholders?
- How do they view you and the work you do?

## Team Activity Complete Stakeholder Map

 California Department of Education  
Student Support & Special Services Branch  
Change Implementation Series

**SSSSB Stakeholder Map**

Write the name of each stakeholder/group in the quadrants below.

High interest Low relevance	High interest High relevance
<p><b>Strength of Interest</b> In your judgment, how much of a priority would each stakeholder place on engaging with your implementation project?</p>	
<p>Low interest Low relevance</p>	<p>Low interest High relevance</p>
<p><b>Relevance to Your Goal</b> How important is it that each stakeholder participate in supporting the success of your implementation project?</p>	

## Stakeholder Map Guidance

High interest  
High relevance

These groups are those who are actively involved in your effort (internal or external)—perhaps as part of your working or advisory groups.

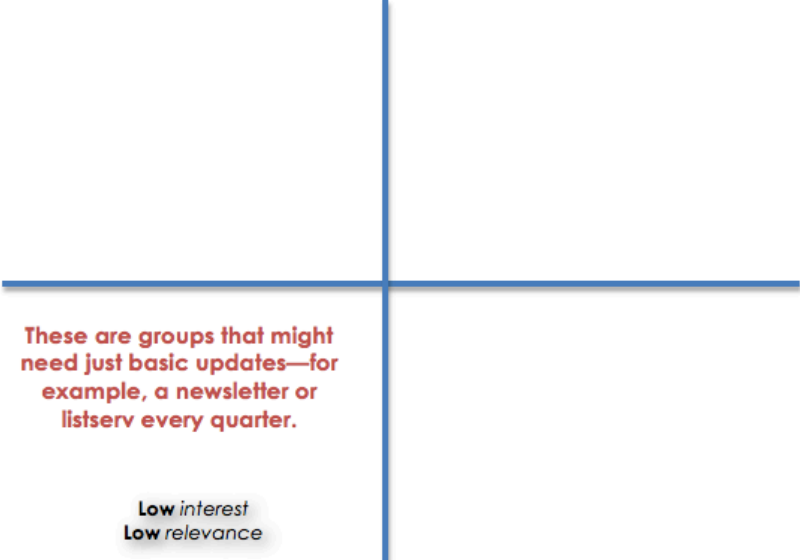
## Stakeholder Map Guidance

Low interest  
High relevance

These groups might not be paying attention to your project now but could be supporters or opponents in the future.



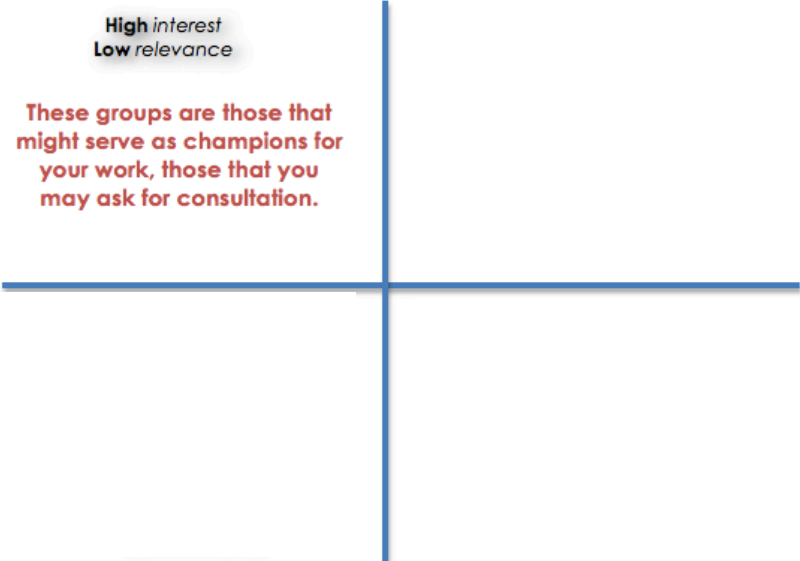
## Stakeholder Map Guidance



These are groups that might need just basic updates—for example, a newsletter or listserv every quarter.

**Low** interest  
**Low** relevance

## Stakeholder Map Guidance



These groups are those that might serve as champions for your work, those that you may ask for consultation.

**High** interest  
**Low** relevance

## Stakeholder Map Guidance

**High interest**  
**Low relevance**

These groups are those that might serve as champions for your work, those that you may ask for consultation.

**High interest**  
**High relevance**

These groups are those who are actively involved in your effort (internal or external)—perhaps as part of your working or advisory groups.

These are groups that might need just basic updates—for example, a newsletter or listserv every quarter.

**Low interest**  
**Low relevance**

These groups might not be paying attention to your project now but could be supporters or opponents in the future.

**Low interest**  
**High relevance**

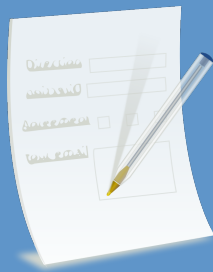


### Section 3

## Design Stakeholder Interactions



## Structure Your Engagement Process



- How will stakeholder purpose and roles inform your process?
- Is this a short-term or long-term process?
- Should you form work group(s)?
- Are meetings the best way to interact? What other options exist?

## Clarify Primary Stakeholder Responsibilities

Will stakeholders ...

- Generate ideas?
- Provide input?
- Interpret/analyze data?
- Propose strategy?
- Make critical decisions?
- Build relationships?
- Actively implement?
- Other?

## Communicate Your Meeting Objectives



What will stakeholders accomplish when they work together?

### Example Objectives:

- Stakeholders **will identify 2-3 strategies** for streamlining the online application process.
- Stakeholders **will develop a plan** for disseminating new grant requirements.
- Stakeholders **will provide input** on barriers that reduce the number of grant applicants.


## Help People Be Good Contributors

If you want stakeholders to accomplish an objective, make sure they have the right background knowledge:

### Example Objective:

- Stakeholders will identify 2-3 strategies for streamlining the online application process.

What do stakeholders need to know about the current process before they are informed enough to contribute effectively?



California Department of Education  
Student Support & Special Services Branch  
Change Implementation Series

## Tips for Designing a Group Engagement


**Stakeholder Engagement Activity Tip Sheet**

There are many ways of engaging stakeholders during meetings; below are some quick examples to help get you started.

Stakeholder Responsibilities	Activity Design/Facilitation Strategies
Generate ideas	<p><u>Mind Mapping:</u> Use a whiteboard or chart paper and have the group brainstorm visually—as ideas are called out, record them and connect related ideas with lines.</p> <p><u>Think-Pair-Share:</u> Ask a question of the group at large. After a couple of minutes to think, have them pair up and discuss their answers. Bring the group back together for a full-group discussion of shared ideas.</p>
Provide input	<p><u>Prompts with Individual Post-It Responses:</u> Provide each person with a set of Post-It notes. Ask a question of the group, and ask them to record their responses, which are then posted to a wall. Assign staff or participants to review these responses during a break and sort them into themes. Discuss with full group.</p> <p><u>Survey:</u> Use simple survey forms to ask for individual answers, either in letter-size paper or chart paper format (during meeting) or online (in between meetings).</p> <p><u>Create Future Agendas:</u> Ask participants to suggest meeting objectives and items or presentation topics for future agendas.</p>
Interpret/analyze data	<p><u>Ask the Right Questions:</u> Before putting new information/data in front of stakeholders, identify 1-3 critical questions or decisions the group is hoping to answer together. Ask the group to brainstorm the types of data and data sources needed to answer these questions.</p> <p><u>Use Sentence Prompts:</u> Consider using prompts such as "We will know we have done/achieved <u>(our mission of...)</u> when the following type of data <u>_____</u> shows us <u>_____</u>."</p> <p><u>Write Your Data Story:</u> Use your critical questions and/or prompt as a guide when identifying the data you plan to share with stakeholders. Before your stakeholder meeting begins, write the questions on a whiteboard or chart paper. As a group, decide if and how the data results you've collected answer the questions.</p>

## Team Activity


### Plan a Stakeholder Engagement Session



California Department of Education  
Student Support & Special Services Branch  
Change Implementation Series


**Plan a Stakeholder Engagement Session**

Step	Detail
Select structure of engagement or interaction	<input type="checkbox"/> Webinar <input type="checkbox"/> Meeting <input type="checkbox"/> Focus Group <input type="checkbox"/> Other _____
Define primary stakeholder responsibilities	
Communicate engagement objectives	<p><u>Objective 1:</u></p> <p><u>Additional Objective(s):</u></p>
Outline basic background knowledge your stakeholders need.	<p><u>Background Knowledge:</u></p>
Describe how this knowledge will be shared prior to the interaction.	<p><u>Method for Sharing:</u></p>
Determine activity strategies you will use to achieve your objectives in this engagement.	
Use tip sheet for activity suggestions.	



## Section 4

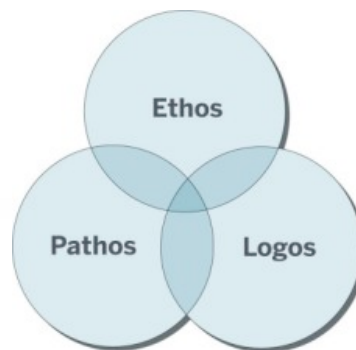
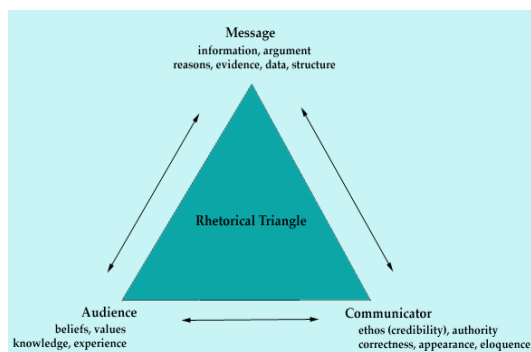
# Crafting Stakeholder Communications



## Communicate for Diverse Stakeholders

- Be concise as possible
- Avoid educational jargon and acronyms
- Define any educational terms you must use
- Stay on topic
- Be concrete—use examples or descriptors that matter to your community
- Display any data in simple graphics/charts

## Key Features of Effective Messaging



**Ethos** = credibility/trust  
**Pathos** = emotions/values  
**Logos** = logic/reason



## Team Activity

### Design a Stakeholder Invitation or Progress Update



#### Stakeholder Engagement:

**Invite People to Join a Process Already Underway!**



**...As We Move Forward**

For the past few weeks/months, we've been facilitating a participatory process in order to...

Here are 2 or 3 key things we've accomplished/learned so far ...

Here's what we need to do next ...

We've now reached a critical point where we would like you to join us to ...

- ☐ Provide feedback ...
- ☐ Interpret data ...
- ☐ Help craft recommendations ...
- ☐ Prepare a message for other stakeholders ...
- ☐ Provide advice on implementation ...

**Engaging Stakeholders in Change Processes**

**Evaluation:  
Two additional questions**

**Thank you for participating!**

