



Design Thinking: Engaging Stakeholders and Partners in Strategic Planning

Alex Stehl

Strategic Planning and Recreation Services Division

California State Parks

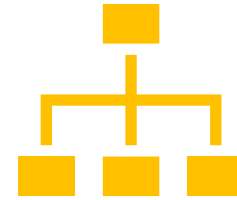
Why Strategic Planning?



Alignment with the
leadership team



Alignment with the
vision and the strategy



Alignment with the
whole organization

Strategic Planning Steps

- The Big Three Strategic Questions
 - Where are we now?
 - Where do we want to go?
 - How will we get there?
- The Five Tasks of Strategic Planning
 - Developing a Vision and/or Mission
 - Setting Goals and Objectives
 - Crafting a Strategy
 - Implementation and Execution
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Gather all the Facts



When making decisions it is always best to have the most amount of information and data available.



Conduct a SWOT and PESTLE Analysis



Gather input from your employees, stakeholders and other partners



Examine internal and external limitations



Consider trends – social and economic

Situational Analysis

External Analysis

- SWOT - Strengths, Weaknesses, Opportunities, Threats
- PESTLE - Political, Economical, Societal, Technological, Legal, Environmental

Internal Analysis

- Stakeholder and Management team inputs

TIP - No Strategic Planning = NO DIRECTION

TIPS

Commit to looking from the outside

Don't reinforce your bias and blind spots

Have 2 authoritative sources regarding key internal perceptions

Break the circle (don't do the same thing every time) – def. of crazy

The strongest voice is not always right

Engagement Planning Tool

A Engagement Plan is important because it:

- **Creates the foundation** for engaging with the public and building consensus with engaged stakeholders about the project.
- **Defines** what successful participation looks like from organization's perspective.
- **Documents the goals and objectives** to help the organization achieve success for the project.
- **Enables staff to manage** the expectations of decision-makers and stakeholders regarding the scope of engagement achievable within available resources, including the project budget and staff capacity.

Design Thinking and Engagement

Design Thinking is solution-based and user-centric

Ask the questions “Who will be using this product?” and “Will the audience understand and relate to the content?”

Use the Design Thinking process to prepare audience-specific and more effective engagement/outreach efforts

Plan Contents

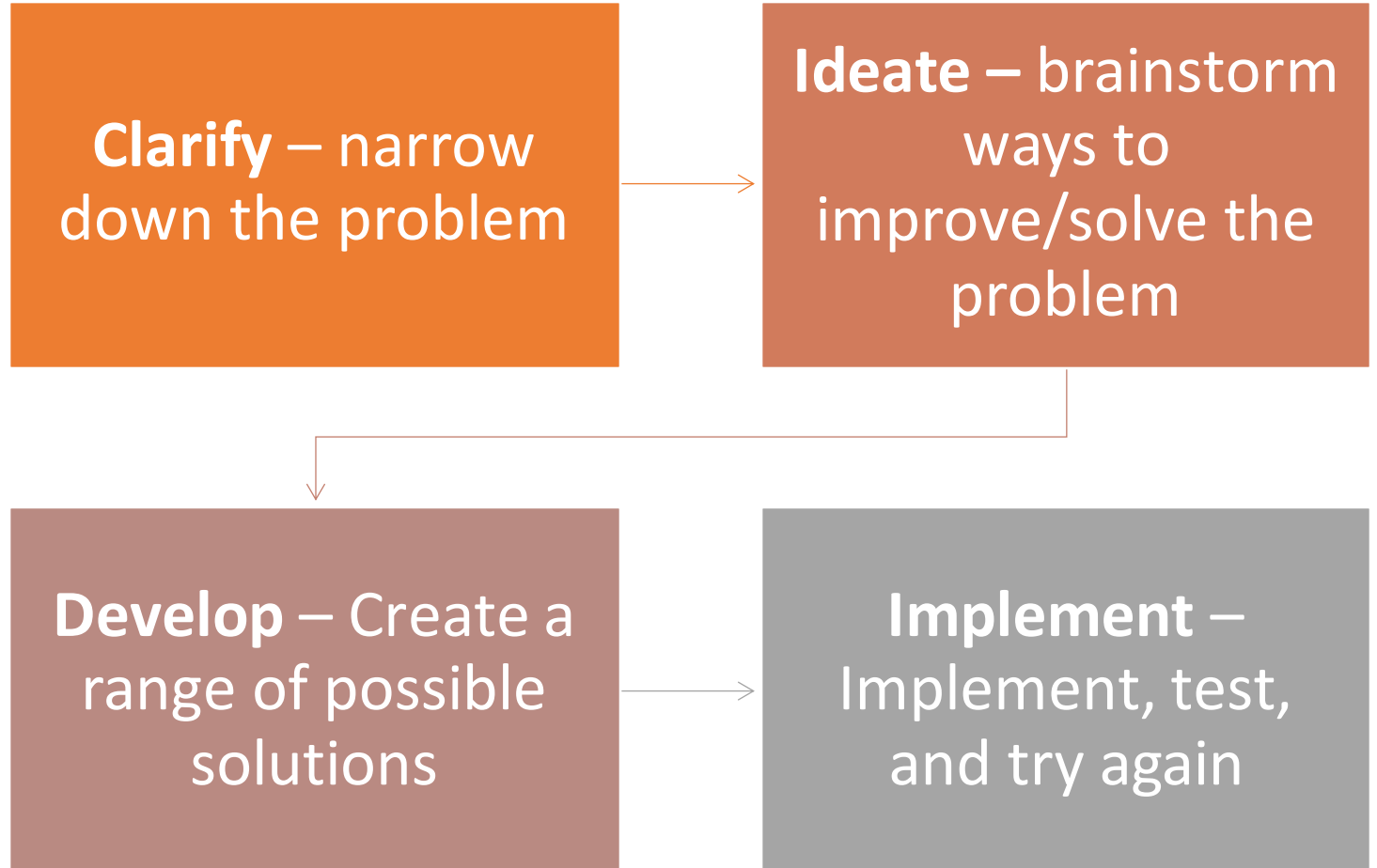
Purpose of the Public Engagement Plan

- Project Outreach Team
- Preliminary List of Outreach Partners/Stakeholders
- Other groups to consider

Outreach Approach

- Phases of Public Engagement (time frame and milestones)
- Outreach Toolbox (outreach methods)

Design Thinking Steps

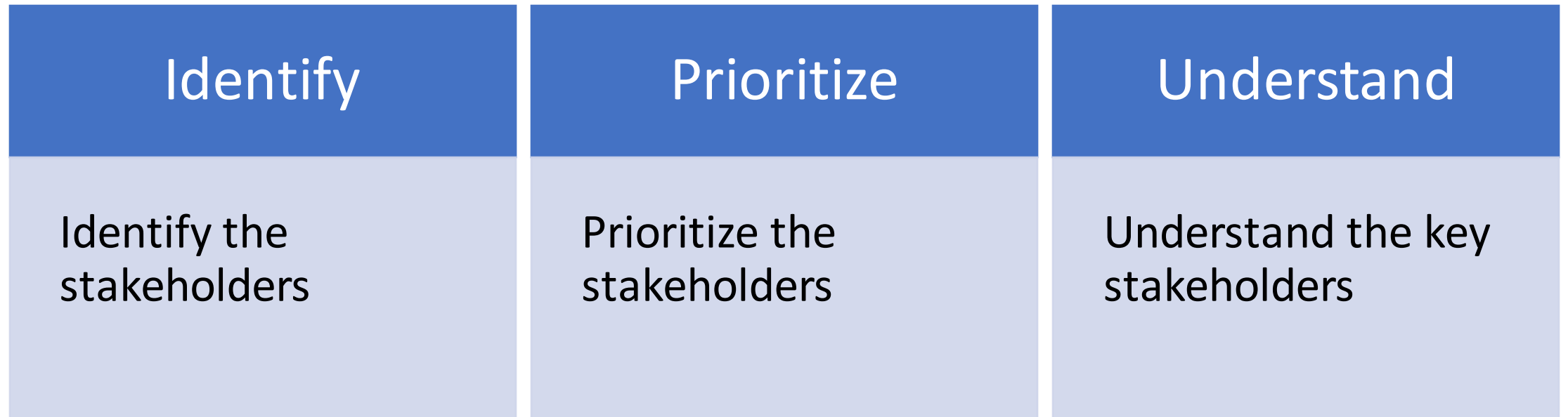


Why Engage?

- To solicit input on a plan or action
- Provide a forum to air grievances or resolve disputes
- Strengthen coordination with stakeholders, partners, other agencies
- Linked to the actions of those who will determine your success – your stakeholders
- From your stakeholders, you can select strategic partners to assist in implementation
- Develop support for your mission

TIP - Your partners may not know you need them to be on your side

How do you do a stakeholder analysis?



Who Are Your Stakeholders

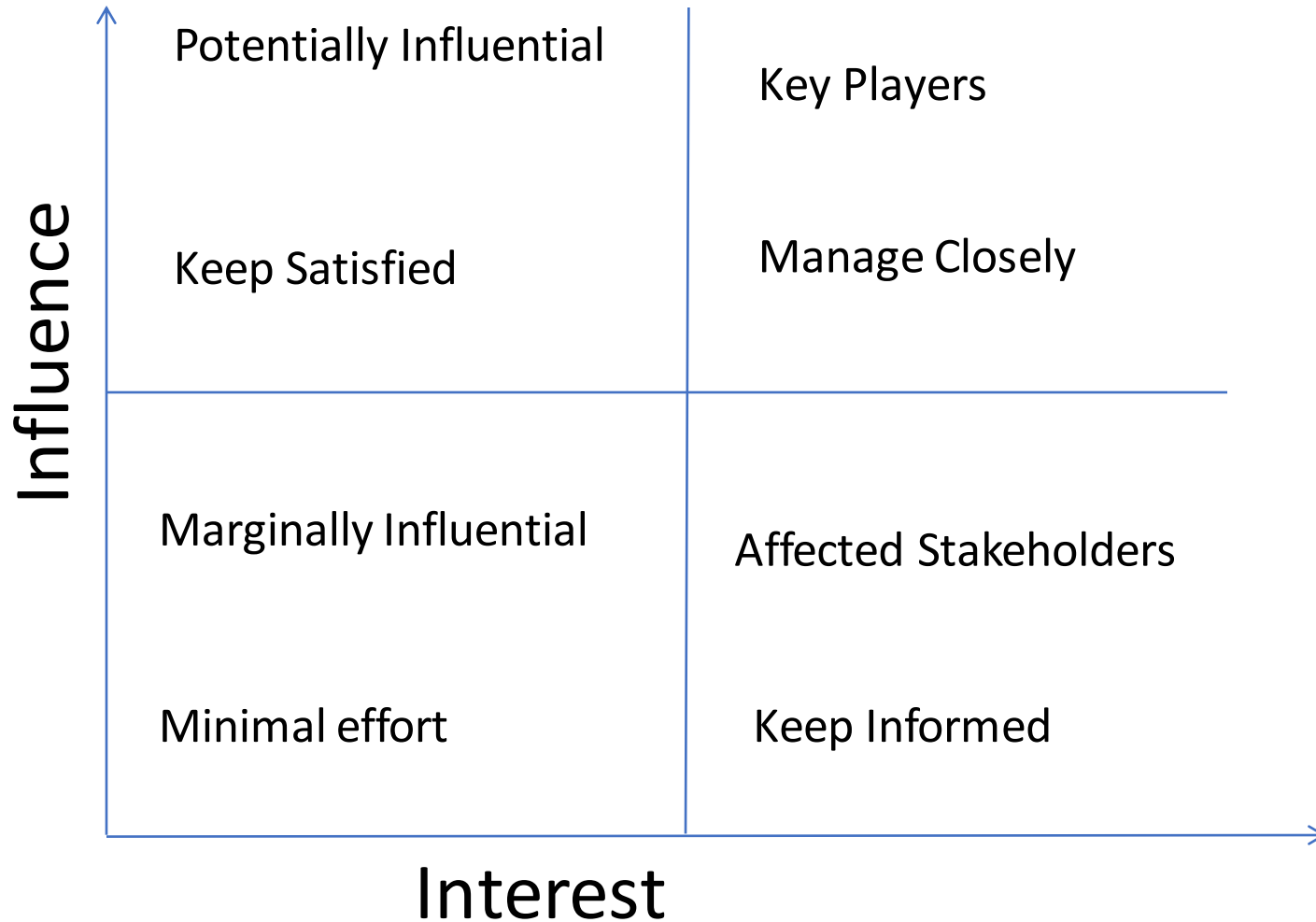
How do you identify Stakeholders

- They have some claim regarding your actions
- They can influence your success (positively and negatively)

They can be...

- Managing/ Internal partners
- Influential leaders
- Government Agencies
- Employees
- Customers/Visitors
- Advocacy Groups/ NGOs
- Regulatory Agencies
- Potential Funders
- Concessionaires / Co-ops

Analyze Your Stakeholders



Prioritize Stakeholders Coastal Trail Reroute

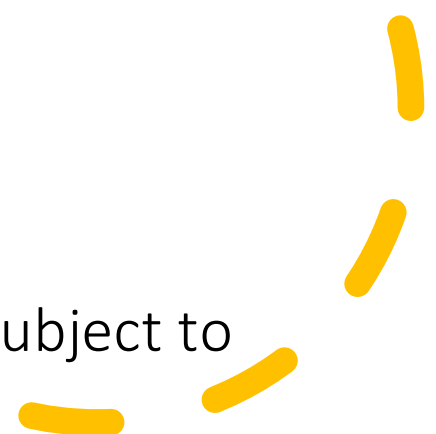
Stakeholder	Interest	Influence	Group	Potential Strategy
Equestrians	High	High	Monitor	Engage early in the concept phase; maintain close communication
Coastal Commission	Medium-High	High	Satisfy	Engage early; diffuse potential concerns regarding ESHA
Surfriders	Low	High	Inform	Engage early, keep updated on progress
US Fish and Wildlife Service	Medium-Low	High	Manage	Reach out early and document contact; incorporate any feedback
Friends Group	High	Low	Monitor	Periodic contact, all notices.

Get to know your Stakeholders

STAKEHOLDER ANALYSIS					
No.	Stakeholder Name	Decision-Maker	Influential power (1-5)	Supporter (S) Neutral (N) Opponent (O)	Willing to Engage?

- Gauge each stakeholder's level of support
 - Supporter
 - Neutral
 - Neutral
- Plan a way forward and make a final report

TIP - As projects evolve and grow, stakeholder influence and interest is subject to change.



Build out your Analysis



Stakeholder Analysis Template

				Advocate / Blocker		Action Plan
Ref	Name	Role	Influence	Current	Required	
1	<Name 1>	Sponsor	4. High power - high influence	Advocate	Advocate	
2	<Name 2>	Executive	4. High power - high influence	Blocker	Advocate	
3	<Name 3>	Supervisor	3. High power - low influence	Neutral	Neutral	
4	<Name 4>	COO	3. High power - low influence	Neutral	Advocate	
5	<Name 5>	Manager	2. Low power - high influence	Advocate	Advocate	
6	<Name 6>	Program Manager	2. Low power - high influence	Advocate	Advocate	
7	<Name 7>	Construction Manager	1. Low power - low influence	Neutral	Neutral	
8	<Name 8>	Event Manager	2. Low power - high influence	Blocker	Neutral	
9	<Name 9>	Accountant	4. High power - high influence	Neutral	Advocate	
10	<Name 10>	Visitor Services	2. Low power - high influence	Advocate	Advocate	

Communications Matrix/ Action Plan

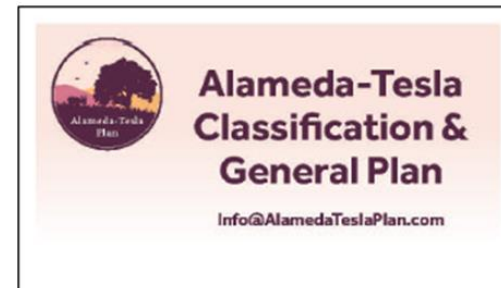
Who?	What/Why	When	Responsible	Media	How/Where
Project Team	Project Coordination	Bi-Weekly, upon initiation	Project Manager	Discussions	Status/Project Meeting
Superintendent	Approve Project Scope	On Project Initiation	Project Manager	Hard Copy/Digital	Status Meeting/ Briefing
	Project Status	Bi-monthly	Project Manager	Digital	Email update
	Resolve controversy	As Required	Project Manager	Issue Log	Status Meeting/Briefing
Stakeholder (high coordination)	Update on Project	On project initiation, monthly	Project Manager	Fact Sheet	1:1 meeting; phonecall
Deputy Director		Immediately prior to groundbreaking	Superintendent	Fact Sheet/issue paper	Email/Phonecall
Dept of Fish and Wildlife	Unofficial consultation	On project initiation	Environmental Staff	Map and description	Phonecall/in-person briefing
	Streambed Alteration Permit	Following project design	Environmental Staff	Permit Application and Project Description	Official submission and phone conversation

The Three Rules of Stakeholder Engagement

- Communicate, Communicate, Communicate!
- Actively involve Stakeholders in the process.
- Make sure your Stakeholders know what the Strategic Plan is and how THEY fit in.

What type of engagement is best?

- Formal vs. Informal – formal is best for required or possibly contentious meetings
- Focus group – for soliciting information or feedback on a specific issue from a select group
- Scoping effort – for soliciting information or feedback from the public
- Workshop – to develop ideas and alternatives (solicit information)
- Tour or site visit – to share information and/or get feedback from a select group
- Virtual vs. in-person
- One on One



Alameda-Tesla Classification & General Plan



Design Thinking Steps in the Engagement Plan

Clarify

- Analyzed the existing stakeholders and past public participation in this park and potential reasons why other user groups were not involved.

Ideate

- Brainstormed ways to reach more potential audiences.

Develop

- Created several public outreach methods to entice people to participate, such as a project webpage, email blasts, social media posts, online surveys, in-person and virtual meetings, and targeted stakeholder meetings.

Implement

- Test these methods, revise as needed, and try different methods.

Move Forward with your Strategic Planning

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Discussion & Questions

Alexandra Stehl

Strategic Planning and Recreation Services Division

916.767.8051

Alexandra.stehl@parks.ca.gov

