Engaging your stakeholders in a project

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Forecasting & Research Systems / Education Research & Data Center

March 19, 2024

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Today's Teachback Focus

- **Why + Who:** Identify stakeholders and understand their interest/influence
  - Types of stakeholders (there are oh so many!)
  - Systems Mapping technique

- **How:** Gather stakeholder feedback for a project
  - Reflection questions to help you organize small groups and one-on-one sessions
  - Questions that leverage stakeholder buy-in and build knowledge

- Our Stakeholder "Discovery Sessions"

- Stakeholder Reflections and Project Next Steps

- Discussion / Q&A

Why engage stakeholders?

We want **someone** to do **something** about **some problem.**

And there are **consequences** for not taking others' needs and **impact** seriously.

Don't wait until the end of a project to think about stakeholders.

- ✓ Helps you understand the "current state."
- ✓ Puts more ideas on the table.
- ✓ Includes varied perspectives from all sectors and elements of the community affected.
- ✓ Saves you from being blindsided by concerns you didn't know about.
- ✓ Strengthens your position if there's opposition.
- ✓ Increases the credibility of your work.
- ✓ Increases the chances for the success of your effort.
- ✓ Helps gain buy-in and support for the effort from all stakeholders.
- ✓ **Fair to everyone – stakeholder engagement is fundamentally about inclusion.**
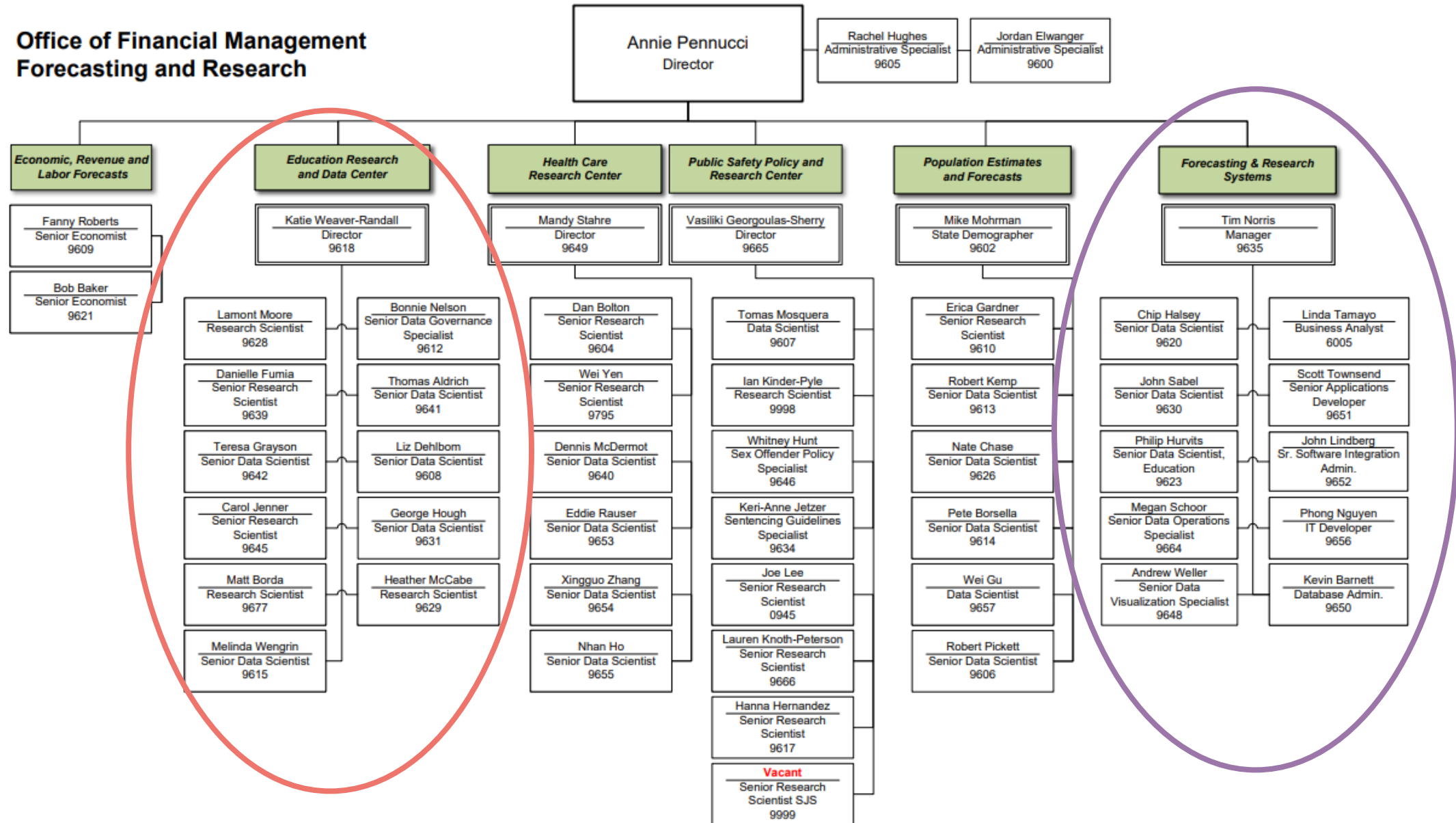
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About ERDC

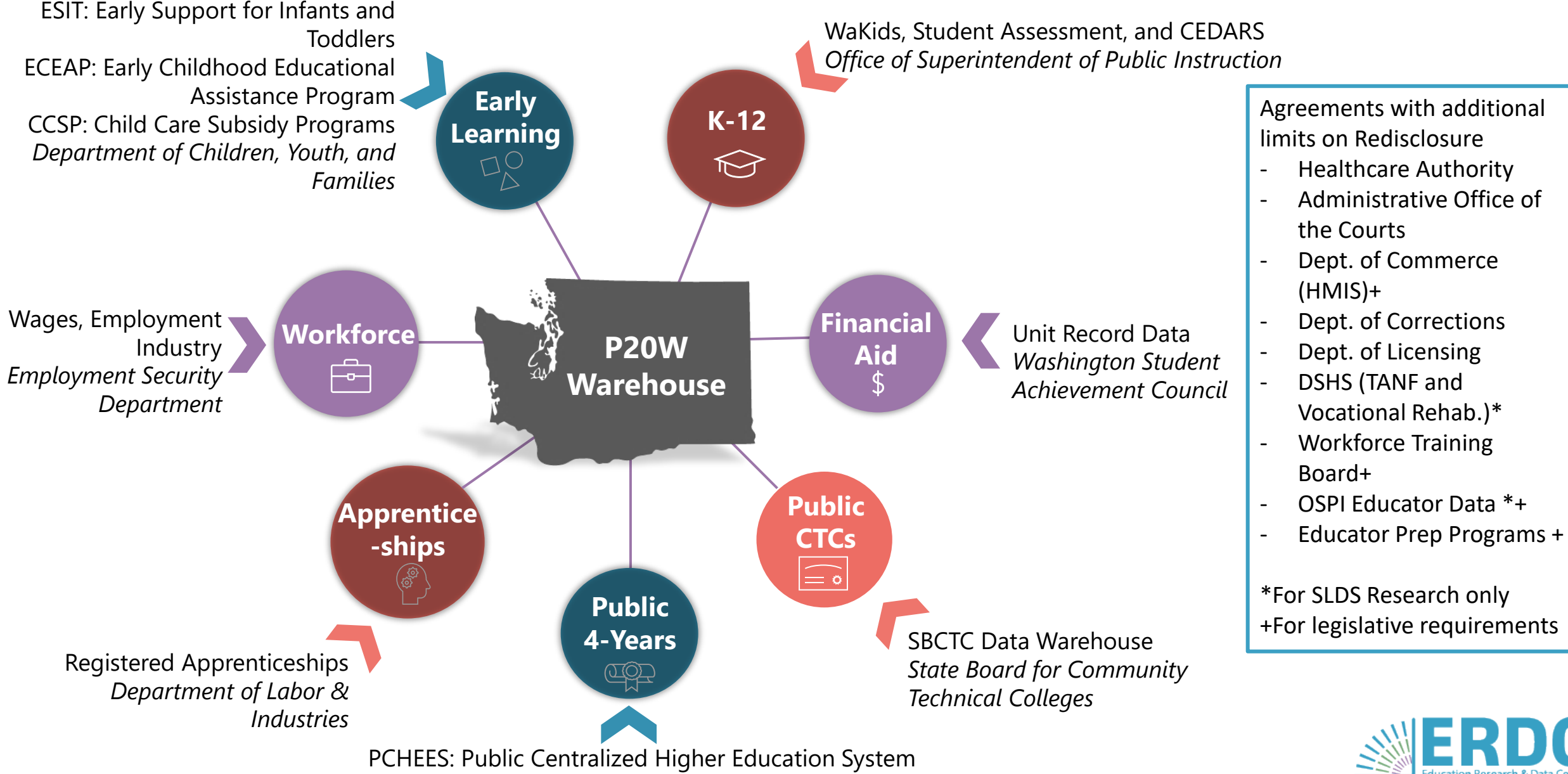Legislatively mandated since 2007 to:

- Identify critical research / policy questions and the data to answer them

- Assemble, link, analyze education and workforce data

- Provide analysis and research focusing on student transitions

- Make data available to the education agencies and institutions

- Provide analysis and data that ensure the interests of the education and fiscal committees of the legislature are served

RCW 43.41.400 – ERDC's Statute

ERDC and the Forecasting & Research Systems Team

Data Share Agreements

ESIT: Early Support for Infants and Toddlers
ECEAP: Early Childhood Educational Assistance Program
CCSP: Child Care Subsidy Programs
Department of Children, Youth, and Families

WaKids, Student Assessment, and CEDARS
Office of Superintendent of Public Instruction

Wages, Employment Industry
Employment Security Department

Unit Record Data
Washington Student Achievement Council

Registered Apprenticeships
Department of Labor & Industries

SBCTC Data Warehouse
State Board for Community Technical Colleges

PCHEES: Public Centralized Higher Education System

Early Learning

K-12

Workforce

P20W Warehouse

Financial Aid $

Apprentice-ships

Public 4-Years

Public CTCs

Agreements with additional limits on Redisclosure
- Healthcare Authority
- Administrative Office of the Courts
- Dept. of Commerce (HMIS)+
- Dept. of Corrections
- Dept. of Licensing
- DSHS (TANF and Vocational Rehab.)*
- Workforce Training Board+
- OSPI Educator Data *+
- Educator Prep Programs +

*For SLDS Research only
+For legislative requirements

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Project Context

- ERDC and the F&R Systems Team must ensure that our P20W data environment meets the needs of staff and customers, now and in the future.

- Timely opportunity to evaluate our current data environment and better understand our options.

- Utilized grant funds to cover the costs of conducting a feasibility study of our P20W data environment.

Are we using the ideal…

- **technical processes** to securely take in data from multiple external data providers?

- tools to **manage the movement of data** at ingestion, while moving / mastering data in the P20W warehouse, and delivering to requesters?

- tools to **perform and manage cross-sector/data provider linking** and unmerging of linked records?

- **model structure and data architecture** to meet our needs?

- tools that are appropriate for our **complex data transformations** and variety of data sources

- **data quality, profiling, and clean-up tools** and processes that are effective and efficient?

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Identifying stakeholders can feel like a daunting task...

What stakeholder terms have you come across in your work?

Which terms do **you** use regularly?

Share them in the chat!

Business Owner

Adversary

Key Player

Initiator

Sponsor

Process Owner

Supplier

Approver

Champion   Agent

Influencer

Change Leader   Decider

Buyer

Implementer

User

Customer
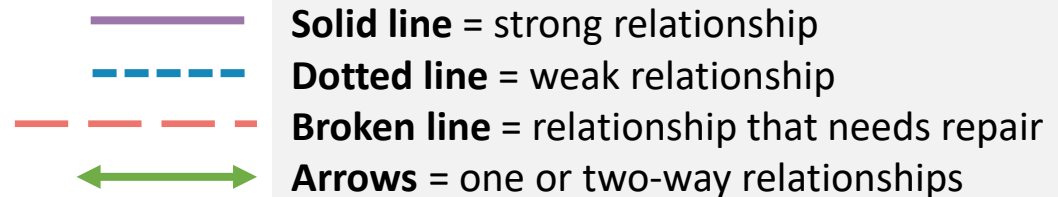
Client

Project Leader

Expert

Guide/Mentor

Systems mapping technique

Stakeholder Roles
1. Change Leader
2. Champion
3. Sponsor
4. Expert
5. Influencer
6. Guide/Mentor
7. Project Leader
8. Implementers
9. Customer or client

Mapping Steps

- Write down a measurable change goal or project objective.

- Use circles to map all stakeholders who are impacted by + interact with your goal/objective.

- Identify what role each stakeholder plays.

- Use different line types to illustrate the quality of relationship with each stakeholder.

Solid line = strong relationship
Dotted line = weak relationship
Broken line = relationship that needs repair
Arrows = one or two-way relationships

Kennedy, J.G. & Fraser, W. (2022). "Systems Mapping." Triple Impact Leadership.
Kennedy, J.G. & Fraser, W. (2022). "Support Systems Worksheet." Triple Impact Leadership.

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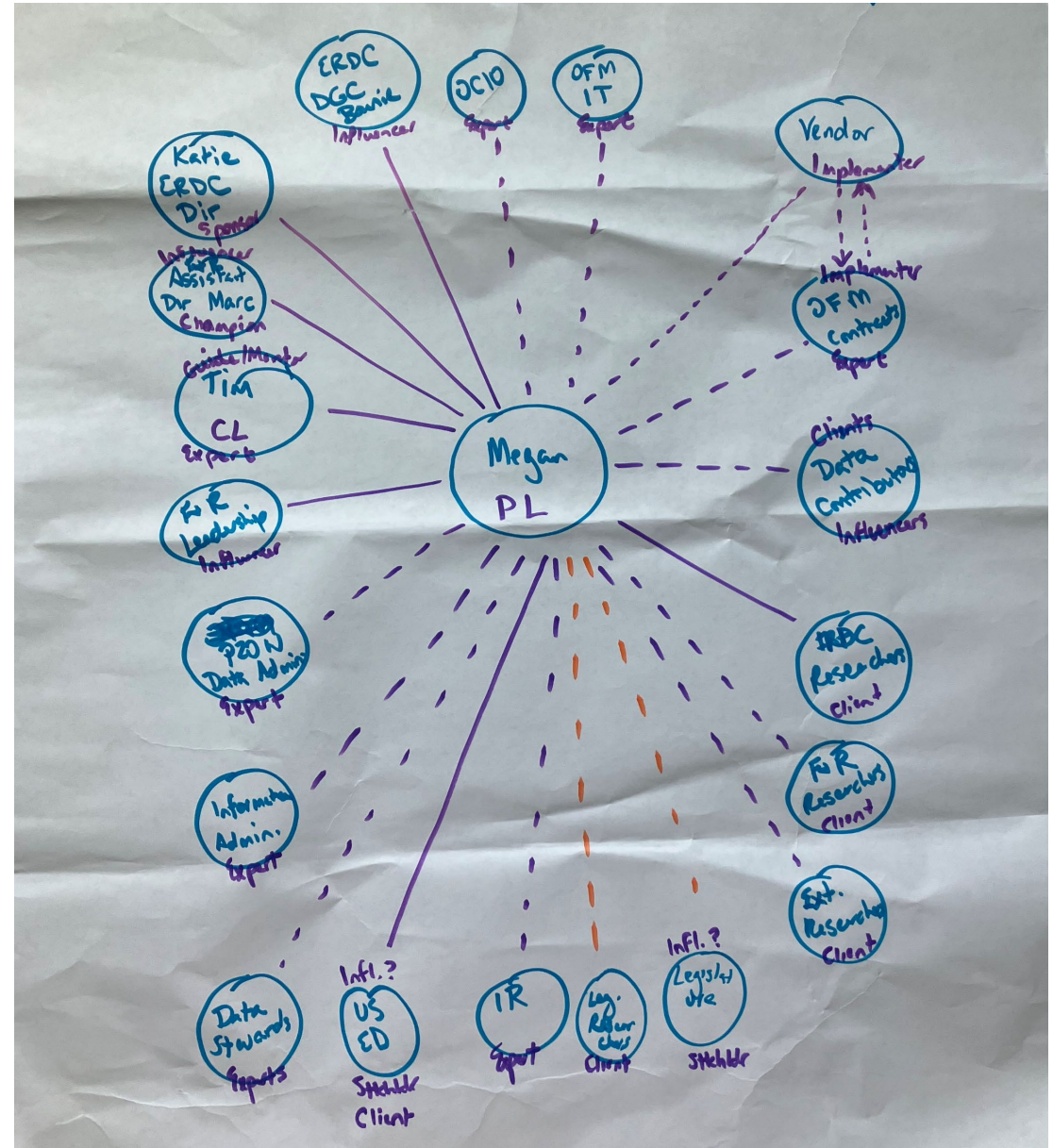Education Research & Data Center

When in doubt, map it out! ☺

Solo exercise as Project Lead and/or

Project Lead facilitates as a group exercise

with project steering committee

Sketch by hand and/or use PowerPoint +

Shapes to create a clean electronic file for

sharing with committee

Reflection post-mapping:

Are there any stakeholder roles that my

goal/project is missing? Add the role as a

circle and identify with steering committee.

Gathering stakeholder feedback

Step 1: Determine stakeholders,

along with their interest or

influence in your project/change

objective.

1. Who is affected by our project/change objective?
2. Are they internal or external to our organization?
3. What project-related process(es) are they involved in?
4. What is their primary role?
5. What do they **do** with the [project/change objective]?
6. What interest do they have in this project/change objective (or its evaluation)?
7. What's **important** to them?
8. What **value** does the [project/change objective] provide them?
9. What **hopes or aspirations** do they have that impact the usability of the [project/change objective]?
10. What **fears or concerns** do they have for the future that impact the usability of the [project/change objective]?
11. How do we best engage them in the evaluation / study of our [project/change objective]?

Gathering stakeholder feedback

Step 2: Identify what kind of feedback that you need from each stakeholder. It likely varies by stakeholder.

Step 3: Prepare questions based on feedback needs and stakeholder roles.

Step 4: Determine whether one-on-one or small group sessions are best suited for the feedback you're seeking, along with format (in-person, virtual, hybrid).

1. What processes or areas of our [project / change objective] do they primarily interact with?

2. What's important to them?

3. What value does the [project/change objective] provide them?

4. What **hopes or aspirations** do they have that impact the usability of the [project/change objective]?

5. What **fears or concerns** do they have for the future that impact the usability of the [project/change objective]?

6. What do we hope to learn from participants?

Our Stakeholder "Discovery Sessions"

- **Between January 2023 – March 2023,** we hosted 25 virtual sessions with 75 participants from 35 different organizations.
  - 25 state government agencies and educational institutions who share + analyze P20W data
  - six community organizations who analyze ERDC's P20W data
  - Staff from OFM Information Technology
  - Staff from OFM Forecasting & Research
  - Partners from federal Statewide Longitudinal Data Systems Grant Program
  - Partners from the Bill & Melinda Gates Foundation

- One-on-one and small group sessions
  - Agency-level leadership
  - Community data users
  - Legislative data users
  - State agency data users
  - Data contributors
  - Multiple staff sessions – data loading staff, researchers, etc.

- ~30 – 60 minutes each session

- Interview Guide emailed pre-session
  - why study is happening
  - purpose of session
  - proposed questions
  - link to feedback form

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Summary of Observations: Bright Spots

ERDC's efforts to improve customer satisfaction, stakeholder partnerships, and internal processes has shown positive impact both within and external to the organization.

Customer satisfaction
with quality of data products and their relationship with ERDC

Building trust
by improving collaboration, transparency and expectation alignment

Business process efficiencies
through process standardization and formalization

Well-defined responsibilities and tasks
for each role in the data management process

Making data more accessible
through data marts and other efforts

Simplified MDM practices
that streamline data validation and loading processes and enable quality assurance

Leveraging modern, market-leading technology vendors
to conduct data management activities now and into the future.

Source: P20W Data System Study Vision and Current State Observations

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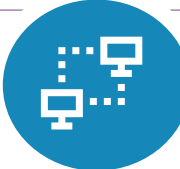Education Research & Data Center

Summary of Observations: Critical Areas of Improvement

While ERDC has made gains, it still faces challenges with data accessibility, skillset availability, and infrastructure modernization that inhibit full value realization for their stakeholders.

1. **Low Understanding of ERDC Value and Effort** put into data products

2. **Limited Staff Resources and No Formal Knowledge Transfer Effort** has perpetuated siloes and risks to sustainable delivery processes.

3. **Inefficiencies in Data Intake Process** due to time-consuming manual entry and delays in delivery timelines

4. **Data Accessibility Challenges** that prevent timely accessibility to key data sources for users

5. **Customers Lack Clear Understanding of Data Products** which can lead to delayed delivery timelines and customer dissatisfaction.

6. **Aging Infrastructure Components cause** disrupted performance in data processing and delays in delivery

Source: P20W Data System Study Vision and Current State Observations

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Vision Statement and Strategic Goals

P20W Data System Study Vision Statement

Ensure that the P20W Data System remains one of the most comprehensive longitudinal data systems in the nation by responsibly and efficiently meeting the needs of data consumers, now and in the future.
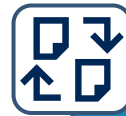
P20W Data System Study Strategic Goals

| Optimize P20W Data System Performance | Improve Data Literacy of P20W Data Environment | Reduce Friction in the Data Request & Fulfillment Process | Leverage and Further Enhance Trusted Partnerships and Communication |

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Reflections on Stakeholder Engagement

- Engaging stakeholders is an ongoing practice that takes effort, but it's worth the investment.
- Use a variety of strategies to engage and update your stakeholders.
  - Kickoff meeting
  - Discovery sessions
  - Feedback Form
  - Summary handouts
  - Study Presentation / Q&A with all stakeholders
  - Dedicated webpage to your project that outlines key information and status updates
- Consider how you and others use the term "stakeholder" in everyday language.

- **Do**
  - Start with objectives
  - Follow a plan
  - Make lists, review solo and with your leadership
  - Tailor your engagement approach to each stakeholder group
  - Keep communication two-way
  - Track your progress!

- **Don't**
  - Skip stakeholder analysis
  - Leave it too late
  - Rely on individual spreadsheets!
  - Ignore accessibility issues
  - Communicate without clear messaging
  - Stop engaging or evaluating!

*Sarah Bentley's 12/16/22 "Reflecting on our Language: Stakeholder" blog post

*Allison Hendricks' "Stakeholder Engagement Tips: The Dos and Don'ts"

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Project Next Steps

- Identified opportunities for short-term improvements to current processes

- Obtained resources to maintain current state and support planning efforts

- Currently in the early stages of planning and designing cloud strategy

- Reviewing and assessing existing roles

- Providing regular project updates via ERDC quarterly newsletter and ongoing stakeholder meetings

- Expand ERDC website content about our data modernization efforts

- Gather stakeholder input to inform "use cases" for our cloud strategy

Discussion / Q&A

Thank you!

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https://erdc.wa.gov/about-us/p20w-data-system-study

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