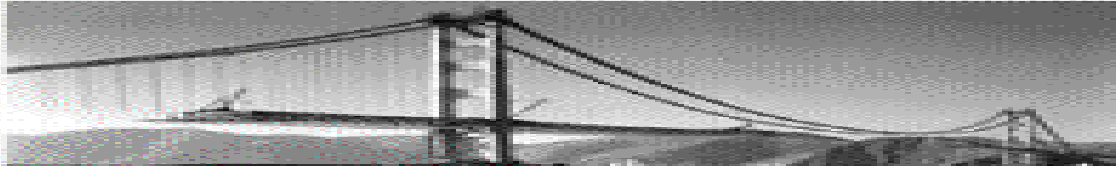


# *Building Bridges*



Volume 1, No. 2

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## **INFORMATION GATHERING: The Foundation for Fact-Based Decision Making in the Planning Process**

### **THIS ISSUE**

In the last issue of *Building Bridges*, we presented a model for the Long-Range Visioning & Strategic Planning Process. This issue will discuss the first of the four phases of the model, Information Gathering.

Information Gathering is the first phase that establishes the foundation upon which the plan will be made. Our goal is to provide information that will assist your organization in developing a relevant Long-Range Vision and Strategic Plan.

In the last issue, we discussed the importance of both preparing for the planning journey and the resource commitments needed.

Information Gathering is the next critical step if the rest of the journey is to be successful.

In addition to the discussion on Information Gathering, we have included information on various resources that may be of interest to your organization.

If you have information that you want to share with your colleagues, send it to us and we will include it in the next issue of *Building BRIDGES*.

Would you like to receive your copy of *Building Bridges* via e-mail? If so, please e-mail us your name, name of your agency, and your e-mail address.

### **Why Gather information?**

Long-Range visioning and strategic planning are both processes that require making important decisions concerning the future of the organization. The most important factor in making decisions is knowing as much as one can about the subject and issues at hand. Without information, decisions are made within a PHOG: Perceptions, Hearsay, Opinions and Guesses. Information Gathering is the process that clears the PHOG with well-documented facts.

Information is gathered from a variety of sources, giving the planning committee a comprehensive view of how the organization is perceived by its various stakeholders.

In addition to obtaining the perceptions and opinions of stakeholders, the process should also include the identification of short- and long-term trends that are impacting the organization's industry and related industries. Knowing your industry's trends are just as important as knowing what others think of the organization.

Other important facts that may be needed are: demographic data on the target population(s) served by the agency; a service needs assessment for the same population; and economic and population trends for the geographical area(s) served by the organization.

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### **Three Basic Questions To Challenge You!**

1. If our organization did not exist today, would we create it?
2. Would we create it as it is today?
3. If not, how would we create it?

## **TRANSITIONS IN LEADERSHIP**

*Providing Management Services During Times  
of Organizational Change*

### **TIL's Management Services**

**Facilitating the Long-Term Visioning & Strategic  
Planning Process**

**Training Seminars/Retreats for Board & Staff**

**Enhancing Team Building & Leadership**

**Assisting With Strategic Alliances & Mergers**

**Reviewing & Analyzing Management Systems**

**Placing Interim Executive Directors**

**Conducting Executive Searches**

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*If You Always Do  
What You Always Did,  
You'll Always Get  
What You Always Got.*

**Karl Albrecht: "The Only Thing That Matters"**

### **Who are your stakeholders?**

It is very important to identify those individuals or groups of individuals who are considered to be your organization's key stakeholders. Stakeholders are: individuals or groups that either have a vital interest in your organization for some specific reason (e.g., recipients of your services and contributors), individuals or groups that may have some influence on the organization or industry (e.g., agencies that fund your services and public policy makers), or individuals who have a perspective of the specific industry in which the agency functions (e.g. leading researchers and writers in the field).

Organizations often forget to include those who are closest to the organization: its board and committee members, volunteers, and staff.

Another group of stakeholders, often overlooked, are those agencies that are either complimentors (providers of other services to the same population) or competitors (providers of similar services to the same population). The perceptions and opinions of your complimentors and competitors will be important as future directions are identified and prioritized.

Determining how to solicit information from each stakeholder group is based on the size of the group and the type of information sought. There are many methodologies used to gather information, such as: individual interviews, focus groups, and/or mail surveys.

It is important to use an outside, independent facilitator to conduct the interviews, and focus groups and receive/analyze the survey forms to ensure the validity and reliability of the information gathering process. Most informants will more likely provide honest and open opinions to an independent facilitator, who assures them that their individual responses will be held in confidence.

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### **Good News & Bad News**

Board Chair to Board: "I have some good news and some bad news. First the bad news, our organization is bankrupt. The good news is that we are in compliance with all State and Federal mandates."

## **Taking The Temperature of Your Organization**

One of the most important stakeholder groups any organization has is its staff. Obtaining staff perceptions and opinions of how the agency is doing is very important, especially in these days of high competition for well-trained personnel.

TIL has developed a questionnaire that identifies how staff perceives the following eleven management categories:

1. Recruitment & Selection of Personnel: Identifies perceptions about staff recruitment, and the selection and retention process
2. Organizational Structure: Identifies issues regarding organizational lines of responsibilities, authority, and communication
3. Control: Identifies how decision making, delegation and lines of communications are perceived
4. Training: Identifies perception of organization's commitment to training
5. Motivation: Identifies how staff feel about being respected and recognized for their efforts, and how job performance evaluations are conducted
6. Creativity: Recognizes level at which creativity is accepted and encouraged
7. Team Work: Identifies how well people work with each other
8. Management Philosophy: Ascertains how staff perceives management/supervision
9. Succession Planning: Detects how well the organization prepares its staff to move up the career ladder
10. Goals: Finds out how clear the organization's goals are and if they are perceived as being applied equitably
11. Rewards: Level and distribution of compensation/benefit package and other means of recognizing work

For more information about surveying your staff contact TIL.

## **Board & staff involvement**

Before any Information Gathering process is begun, board and staff should be involved in the identification of the stakeholder groups and individuals and the methodology to be used.

The facilitator develops the questions used in the interviews, focus groups and/or surveys. These should be reviewed by a committee of staff and board for comment and revisions.

There should be a clear partnership among the facilitator, board, and staff.

## **How Long Does It Take??**

The planning process is not something that can be accomplished in a few hours or at a weekend retreat. The journey takes time; it requires perseverance and commitment.

## **Planning outcomes**

A well-organized and systematic planning process will create the following outcomes:

- *Strengthens board's cohesion by developing a shared sense of direction and ownership*
- *Clarifies the environment*
- *Identifies ways to position the organization to be more financially stable*
- *Provides an overall sense of stability*
- *Identifies strategies for measuring service Outcomes*

## **ARE YOU ONE OF THE 19%?**

The National Center for Nonprofit Boards (NCNB) recently (1999) conducted a survey with CEOs responding for 1,342 nonprofit organizations. One of the questions asked was related to when the agency had participated in a Strategic Planning process. Nineteen percent responded "Not in Recent Memory."

Contact TIL To Facilitate Your Agency's Next Long-Range Visioning & Planning Process.

*RESOURCES OF INTEREST TO  
NONPROFIT ORGANIZATIONS*

- **"Board Café" – The Electronic Newsletter Exclusively for Members of Nonprofit Boards of Directors.** Short enough to read over a cup of coffee, Board Café offers a menu of ideas, information, opinions, news, and resources to help board members give and get the most out of board service. Co-published by the National Center for Nonprofit Boards and CompassPoint Nonprofit Services (formerly the Support Center for Nonprofit Management). Chief Writer: Jan Masaoka.  
[boardcafe@compasspoint.org](mailto:boardcafe@compasspoint.org),  
<http://www.boardcafe.org> .

If you would like to have BOARD CAFÉ delivered to you free via electronic mail, send an e-mail message to [boardcafe@compasspoint.org](mailto:boardcafe@compasspoint.org) and in the body of the message type SUBSCRIBE BOARD CAFE.

- The NCNB 1999 survey indicated that the one of the most challenging tasks that nonprofit boards face is raising money. The following new resources should be of great help to your organization: "*Secrets of Successful Fundraising: The Best From The Non-Profit Pros*," Compiled and Edited By Carol Weisman, Published by F.E. Robbins & Sons Press, St. Louis, MO, 48 Granada Way, St. Louis, MO 63124, 1(888) 500-1777.

- **Additional nonprofit management and fund raising information:**

*The Chronicle of Philanthropy:*  
[www.philanthropy.com](http://www.philanthropy.com)

*Contributions:*  
[www.contributionsmagazine.com](http://www.contributionsmagazine.com)

*The Nonprofit Times*  
[www.nptimes.com](http://www.nptimes.com)

*National Center for Nonprofit Boards:*  
[www.ncnb.com](http://www.ncnb.com)