



Building Effective Virtual Teams for Stakeholder Engagement

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SRI Education™
A DIVISION OF SRI INTERNATIONAL



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Logistics

- Questions in the chat
- Q&A time at the end of the presentation
- Please mute if not speaking
- Will be recorded

Learning Objectives

- By the end of this webinar, participants will be able to:
 - Identify the new requirements related to stakeholder engagement in IDEA Part C and Part B 619
 - Identify different levels of stakeholder engagement
 - Describe a protocol for effective stakeholder engagement
 - Align virtual strategies to promote various levels of engagement for stakeholders

Warm-up

“Who do you define as your stakeholders?”





Who do you define as your stakeholders?

ⓘ Start presenting to display the poll results on this slide.

OSEP Stakeholder Requirements

“OSEP expects that States meet the stakeholder involvement requirement based on the FFY 2020 SPP/APR Instructions and Measurement Table. For FFY 2020–2025, States’ description of stakeholder input on the States’ targets in the SPP/APR must include:

- The number of parent members and a description of how the parent members of the Interagency Coordinating Council/ State Advisory Panel, parent center staff, parents from local and statewide advocacy and advisory committees, and individual parents were **engaged in target setting, analyzing data, developing improvement strategies, and evaluating progress;**
- Description of the **activities conducted to increase the capacity of diverse groups of parents** to support the development of implementation of activities designed to improve outcomes for infants, toddlers, and children with disabilities and their families;
- The mechanisms and timelines for soliciting public input for **target setting, analyzing data**, developing improvement strategies, and evaluating progress; and
- The **mechanisms and timelines** for making the results of the target setting, data analysis, development of the improvement strategies, and evaluation available to the public.”

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Source: SPP/APR Universal Technical Assistance for 2020-2025 submission:
<https://sites.ed.gov/idea/files/Universal-TA-for-FFY-2020-2025-SPP-APR.pdf>



Representativeness

- **Representativeness**

"Race/ethnicity was included as a required demographic category because OSEP believes that it will increase high quality data necessary for States to improve outcomes. High quality data means data that accurately reflect the infants, toddlers, and youth with disabilities served. Therefore, OSEP believes that it is necessary to include race/ethnicity and at least one other category from the those listed in the Measurement Table. OSEP acknowledges that some States may have to update surveys and data collection tools to include the required data elements; therefore, OSEP delayed the requirement to report on the specific demographic categories to February 2023 for Part B programs and February 2024 for Part C programs so States will have time to make any necessary adjustments."

- **Source:** SPP/APR Universal Technical Assistance for 2020-2025 submission:
<https://sites.ed.gov/idea/files/Universal-TA-for-FFY-2020-2025-SPP-APR.pdf>

In Summary



Expanding Stakeholder Groups and
Increased family representation



Aligning stakeholder demographics to
reflect demographics of families and
communities



Continuous, active engagement with
various methods and timeframes to
obtain stakeholder engagement

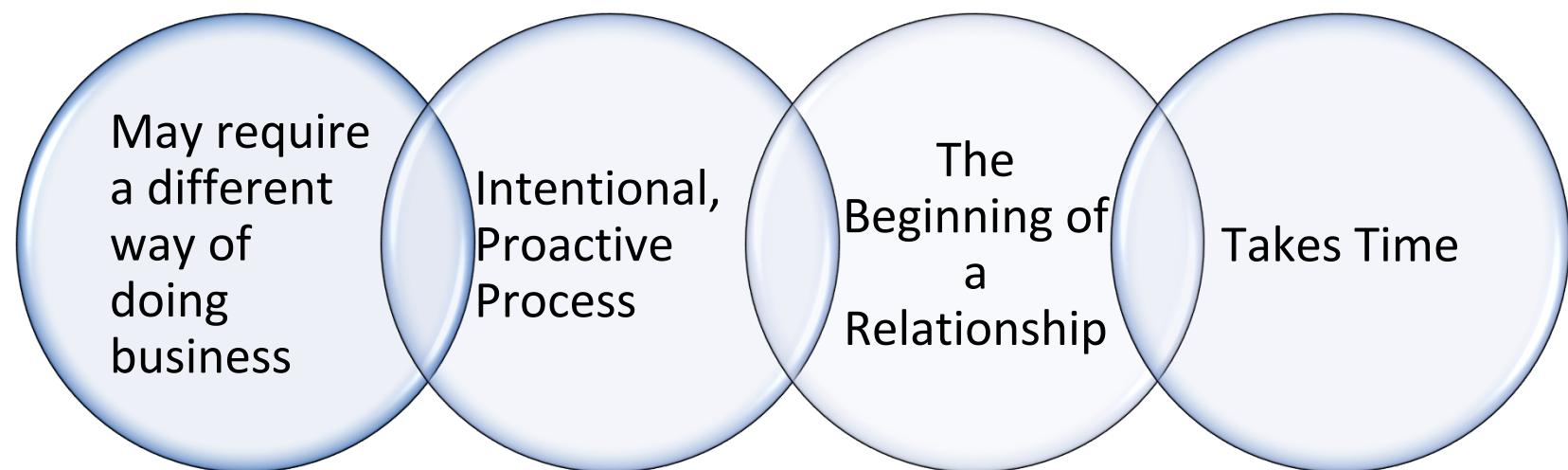
Stakeholder Engagement Requirements

- “States should not wait for more clarification but should start planning their stakeholder engagement strategies now. When reviewing the entirety of the stakeholder requirements, it becomes obvious that the intent is for states to have a robust stakeholder engagement plan for their SPP/APR that includes a broad range of individuals who have a stake in the results and outcomes for children and youth with disabilities. The stakeholder engagement should be ongoing and involve all stakeholders in planning, implementing, and evaluating the SPP/APR, with a focus on results.”

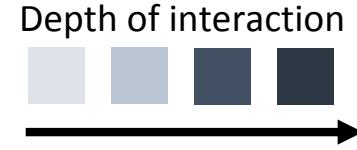
Source: IDC, Nancy O’Hara’s Blog, What will Stakeholder Engagement Look Like with the New SPP/APR? Making Requirements a Reality!

<https://ideadata.org/news/item/2344/what-will-stakeholder-engagement-look-like-with-the-new-sppapr-making-requirements-a>

Implications and Considerations



Levels of Engagement



Adapted from *Leading by Convening: A Blueprint for Authentic Engagement*.
See more here:
<http://www.ideapartnership.org/documents/NovUploads/Leading%20by%20Convening%20508.pdf>

Informing

Sharing or disseminating information with others who care about the issue; top-down, one-way communication

Collaborating

Engaging a more representative group of stakeholders who care about the issue in trying to working together around the issue to make change

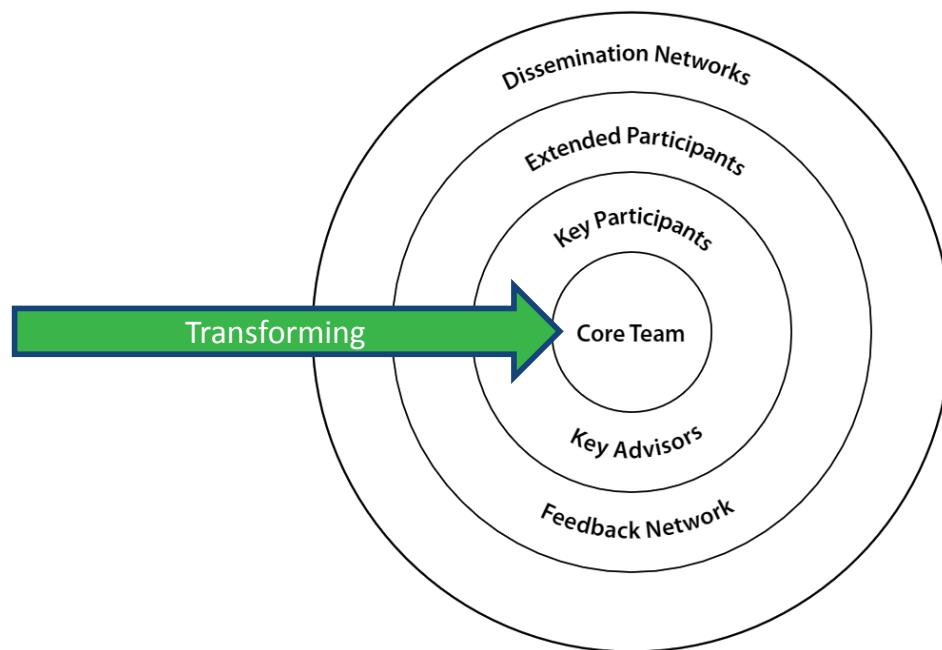
Networking

Asking a select group what they think about this issue & listening to what they say; limited two-way communication

Transforming

Leading by convening, facilitating deep cross-stakeholder engagement & leadership, sharing leadership, building consensus

Engaging a Broad Range of Stakeholders

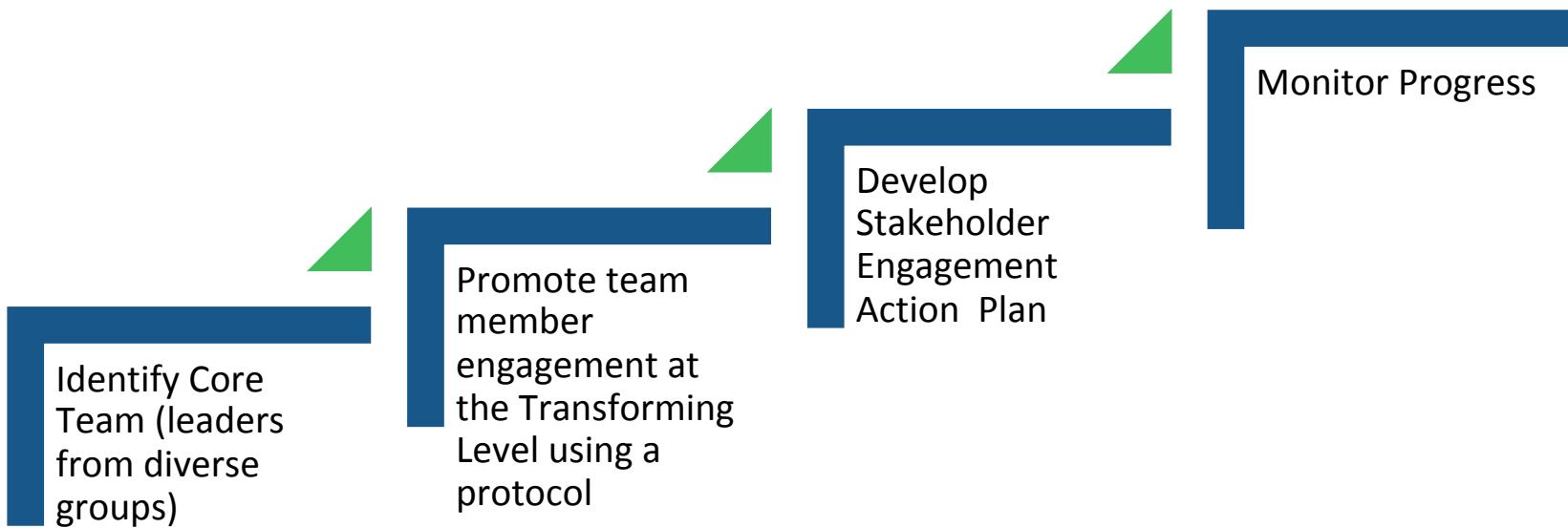


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Graphic copied from *Leading by Convening: A Blueprint for Authentic Engagement*.

See more here: <http://www.ideapartnership.org/documents/NovUploads/Blueprint%20USB/Ensuring%20Relevant/Engage%20Everybody.pdf>

Engaging Core Teams at the Transforming Level



Core Team Members

Selection Considerations

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When setting SSIP/SPP/APR targets, from which stakeholder groups/representatives would you invite leaders to form a Core Team?

ⓘ Start presenting to display the poll results on this slide.

Transforming: Identifying a Core Team

- Consider the following elements when selecting stakeholder groups/representatives to expand the variety of your team:
 - Geographic Location
 - Stakeholder's Race and Ethnicity
 - Stakeholder's SES
 - Stakeholder's Disability
 - Programs Served

Assembling the Table

Consider these questions throughout the process to ensure no one is overlooked:

- Who will be representing the interests of the individual community members whose data are being used?
- Which people or organizations will be affected by the results of your data team's effort now and in the future?
- Who is influential within your area, community, or organization?
- Who has been involved in this issue in the past?
- Who has not been involved in past engagements, but should have been?
- Are there any barriers to engagement that may be/have been deterring some stakeholders?

Families and family organization stakeholders come to the decision-making table with...

- Unique life stories that give them motivation to serve as thought leaders and change agents on behalf of *all* children and families, not just their own.
- Different levels of access to information and support.
- Different experiences with using data in both their personal and professional lives.
- Intersectional identities that inform their understanding of the data (e.g., identifying as female *and* Asian American).
- Varied feelings about today's "data-rich" culture.

Considering **intersectional identities** is not about *adding* one aspect of identity to another. It is about how people with overlapping identities experience systems of power. ([Catalyst, 2020](#))



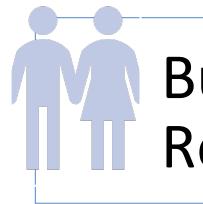
To effectively serve as program stakeholders,
families and family organization representatives need to...

- Understand why data are important;
- Understand what data are being collected and how those data are used;
- Know who is involved in data conversations and their roles in decision-making;
- Understand how they are/can be involved in data use.

**It is essential to create a safe environment and provide support
for families to feel comfortable asking questions about data.**



Transforming: The Partnership Way



Build
Relationships



Equal
Partnership



Consensus



Shared
Responsibility



Collective
Impact

The UNITED Protocol



Source: Mainzer & Stein, 2013 – Johns Hopkins University, School of Education, Center for Technology in Education

High Performance Teaming Principles



Positive interdependence

- Team members are linked with each other, one cannot succeed unless everyone succeeds.



Individual accountability

- Each member is accountable for contributing his or her share of the work for the team to make progress.



Performance monitoring

- Teams reflect upon how well they are achieving their goals and maintaining effective working relationships



Engagement and momentum

- Team members share resources and help, encourage, and praise each other's efforts to achieve the desired outcome



Collaborative competence

- Teams have interpersonal and small group skills required to promote collaboration.



Technology optimization

- Teams use technology and data to maximize efficiency.

Coming to Consensus

Equal
Voice

Divergent
Thoughts

Informed
Decisions

Decision
Buy-in

"Effective consensus falls somewhere on a continuum between perfect agreement and total discord. Poor strategic decisions emerge at either extreme."

—Priem 1990

Your Decision-Making Process

Thumbs Up/Down



Vote: 5-3-1



Checks/Tallies



Team Standards



Listen actively to understand.



Complete activities on time.



Participate and contribute to team productivity.



Respect each other.



Offer help willingly.



Be organized and prepared.

Determine Roles



Roles

- **Facilitator** - facilitates meeting/activity.
- **Coach** - keeps the team on track toward high performance.
- **Timekeeper** - monitors meeting time and helps the team adhere to the meeting agenda.
- **Recorder** - documents notes during the team meeting.

Month	Facilitator	Coach	Timekeeper	Recorder
August				
September				
October				
November				
December				
January				
February				
March				

Logistics



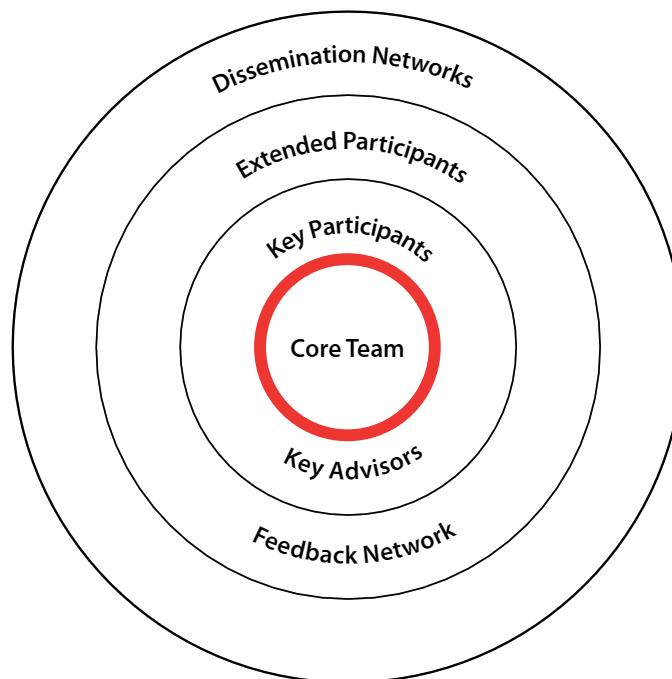
Determine Logistics for Working Together:

- When and where will meetings take place?
- How long do we need to schedule for each team meeting?
- Who will be responsible for meeting invitations?
- How will you organize your documents
- How will you address team absences on the day of the meeting?
- What data and information are necessary to gather prior to the team meeting?
- What other logistics do we need to consider?

Planning for Continuous, Active Engagement



Technology Tips for Stakeholders



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Graphic copied from *Leading by Convening: A Blueprint for Authentic Engagement*.
See more here: <http://www.ideapartnership.org/documents/NovUploads/Blueprint%20USB/Ensuring%20Relevant/Engage%20Everybody.pdf>

Stakeholder Engagement Action Plan



Transforming Level

Transforming Definition	Who	Habits	Virtual Tools
The Core Team engages in deep cross-stakeholder engagement & leadership, shares leadership responsibilities, and reaches consensus for decision making in order to facilitate the work of the whole team.	Core Team	<ul style="list-style-type: none">• Ongoing, effective consistent communication<ul style="list-style-type: none">• Within Core Team• Across all stakeholders• Shared drives• Engaging Meetings• Progress Monitoring	<ul style="list-style-type: none">• Email, text messages, Slack, Teams, Phone Apps• Shared Documents (Google, Teams)• Padlet, Slido, Poll Everywhere, Zoom

Collaborating Level

Collaborating Definition	Who	Habits	Virtual Tools
The whole team is engaged and working together on an issue over time.	Key Participants & Advisors	<ul style="list-style-type: none">• Ongoing, effective consistent communication<ul style="list-style-type: none">• Across all stakeholders• Shared drives• Engaging Meetings• Progress Monitoring	<ul style="list-style-type: none">• Email, text messages, Slack, Teams, Phone Apps• Shared Documents (Google, Teams)• Padlet, Slido, Poll Everywhere, Zoom

Networking & Informing

Level of Engagement	Who	Habits	Tools
Networking - Asking a select group what they think about this issue & listening to what they say; limited two-way communication	<ul style="list-style-type: none">Extended participants- brought to the team by key participants and advisors	<ul style="list-style-type: none">Strategically plannedBased upon preferred communication platforms for various stakeholdersMore than one way!Monitored consistently	<ul style="list-style-type: none">TwitterFacebookPoll EverywhereSurveysFocus Groups
Informing - Sharing or disseminating information with others who care about the issue; top-down, one-way communication	<ul style="list-style-type: none">Dissemination Networks- participants from all the groups	<ul style="list-style-type: none">Strategically plannedConnected to Networking strategyProvide relevant information to the communitySupported by key partners	<ul style="list-style-type: none">BlogNewsletterFlyerPodcastsRadio



Stakeholder Engagement Action Plan

SPP/APR Stakeholder Engagement Plan				
Levels of Interaction	Stakeholders	Actions	Frequency	Person(s) Responsible
Transforming	Core Team <ul style="list-style-type: none">• leaders from diverse groups• work together to engage all stakeholders at all levels	<ul style="list-style-type: none">• Committing to team standards and principles, consensus around decisions• Doing things the Partnership Way• Developing and implementing the Stakeholder Engagement Action Plan	<ul style="list-style-type: none">• Monthly, via Zoom	<ul style="list-style-type: none">• Core team members
Collaborating	Key Participants and Advisors <ul style="list-style-type: none">• groups that have responsibility or interest in the issue	<ul style="list-style-type: none">• Engaging via Zoom Meeting(s): Working Together e.g., on Data Analysis for Target Setting	<ul style="list-style-type: none">• Weekly for the first month to set targets• Monthly after October to monitor	<ul style="list-style-type: none">• State team lead• Parent Organization Member• Local I&T Directors• Teachers
Networking	Extended Participants & Feedback Networks <ul style="list-style-type: none">• individuals who work at the practice, family or individual level & engaged at the Networking level	<ul style="list-style-type: none">Exchanging<ul style="list-style-type: none">• Twitter• Facebook• Poll Everywhere• Surveys• Focus Groups	<ul style="list-style-type: none">• Twitter – 1 x week• Facebook-monitored daily• Poll Everywhere Surveys – 2 x year (Aug, Jan)• Focus Groups – 3 x per year	<ul style="list-style-type: none">• Core team members, as assigned.
Informing	Dissemination Networks <ul style="list-style-type: none">• includes participants from all groups	<ul style="list-style-type: none">Sharing/Sending<ul style="list-style-type: none">• Blog• Newsletter• Flyer	<ul style="list-style-type: none">• Blog - Monthly• Newsletter - Quarterly• Flyer - As needed	<ul style="list-style-type: none">• Core team members, as assigned

DaSy Virtual Engagement Toolbox



Resources to Increase
Virtual Engagement



How will you prepare stakeholders differently to engage in data conversations?

ⓘ Start presenting to display the poll results on this slide.

Questions



Thank you

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