

Participatory on Purpose

Inclusive planning doesn't have to mean that everybody decides everything

It's always the people:

The hard, joyful, human work of leading nonprofits

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**People
Centered
Change**



Hi, I'm **Julia**

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People Centered Change

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Today's purpose & intended outcomes

Why are we here, and what do we hope to accomplish?

Purpose

The purpose of this session is to help nonprofit leaders move past all-or-nothing approaches to participatory planning and **learn how to make deliberate, transparent choices about who participates in planning processes**, how, and why.

Intended outcomes

In service of this purpose, together we will...

- Explore **why participatory planning so often defaults** to either top-down decision-making or unwieldy all-hands processes (and why that goes wrong);
- **Learn a practical framework** for determining how participatory a given planning decision needs to be;
- Work through a set of questions that help you **design who's involved, at what level, and why**; and
- Practice applying these tools to **a real planning challenge** from your own organization.

Checking in

Think about the last time you had to decide how many people to involve in a planning process.

What's one thing that made it hard?



**Where planning goes sideways,
and some reasons why**

The all-or-nothing default

Often, planning processes end up getting stuck in one of two default patterns: either a top-down decision that gets made behind closed doors (*oooooh, mysterious*), or a well-intentioned participatory process that balloons out of proportion.



Leadership makes a call and then rolls it out. A couple individuals might get tapped to weigh in, but it might feel like a “usual suspects” type of situation. Wider staff find out when the decision gets rolled out.



What feels like *everyone* get invited into a process that struggles to converge. Input goes in every direction, nobody's sure who's deciding, and the whole thing feels frustrating and doesn't land on clarity.

How this plays out: the three failures

Whether planning is too closed or too open, the underlying problem is often the same: **we treat process participation and decision-making authority as though they are the same thing.**

Exclusion as protection

Well-intentioned leaders seeking to protect their staff.

"We don't want to worry anyone. We don't want to burden them. They don't have enough context".

These plans can then lack the grounding needed to succeed.

Participation without backing

Staff are invited to help shape a plan, but the folks with the authority and resources needed to make the plan a reality aren't in the room.

You end up with something folks are excited about, with no path to implementation.

Open process, hidden decisions

Leaders invite input but the real decisions are made behind closed doors. Information about *how* the decision was made isn't shared – and so folks wonder if their participation was real or not.

Even if the decision *did* reflect their input, there is trust lost.

➤ Where does this feel familiar?

➤ What might be the hardest to recognize when you are in the thick of it?

So what do we do instead?

Making deliberate and explicit choices about who participates, how they participate, and who decides.

Two design choices: participation & power

Since conflating these concepts is what often gets in our way, being intentional about designing them as separate process elements is what helps us create inclusive planning processes that drive clarity and robust outcomes.



Process participation

Who is involved in the planning process, how, and at what stage? This is about making sure the right people contribute the right things at the right moments to get to a quality outcomes.



Decisional authority

Who holds authority over the outcome, and how is that communicated? This is about being transparent and deliberate about where the decision actually sits.

Part of why this works: expectation management & alignment

Often frustration with planning process comes from a mismatch between expectations and reality – I understand my role in one way, but my inputs are being used in a different way.

While being explicit doesn't eliminate genuine frustration with not holding decisional authority, it does reduce the friction that comes from not knowing where you really stand.

Design choice one

How broad should process participation be?

Four questions to help you think through the scope and composition of participation in your planning process.

The answers to these questions tell you both who should be in the room and how broad your participation needs to be.

If the same small group answers all four, your process can be narrow. If the answers point to very different people, that's a signal that broader participation is needed.

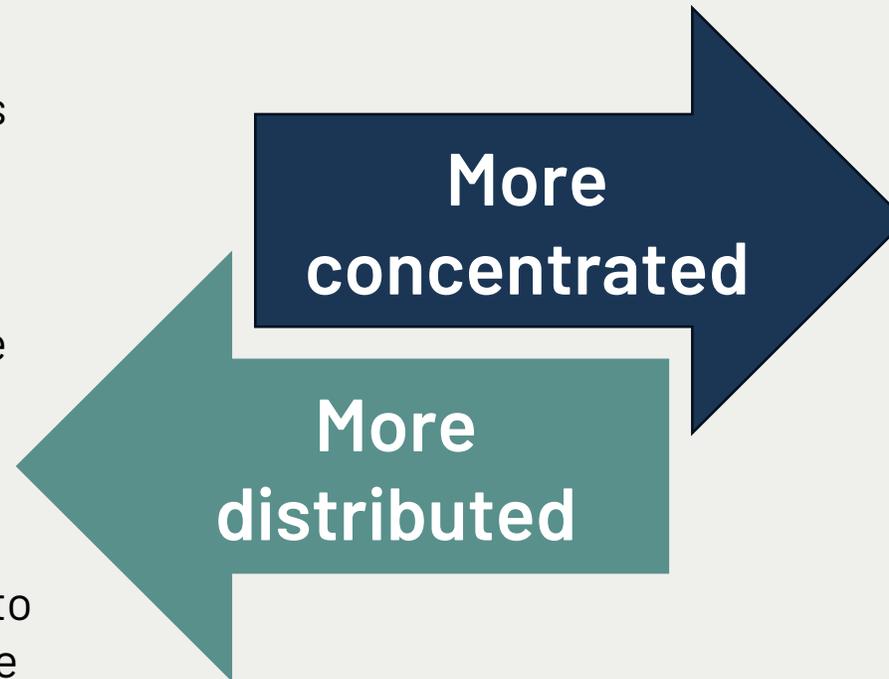
- **What information does this decision need?** Whose knowledge, expertise, or functional perspective would make this decision better?
- **Who connects this to the rest of the organization?** Who holds the authority, resources, or context needed for this to have a path forward?
- **Who does this decision affect?** Who carries implementation, and who will feel the impact of the outcome?
- **Whose absence would be a blind spot?** What perspectives are missing – across tenure, role, identity, and lived experience?

Design choice two

How distributed should decisional authority be?

In any decision-making context, some factors push you toward concentration of decisional authority, while others pull you toward broader distribution. Here are some of those factors.

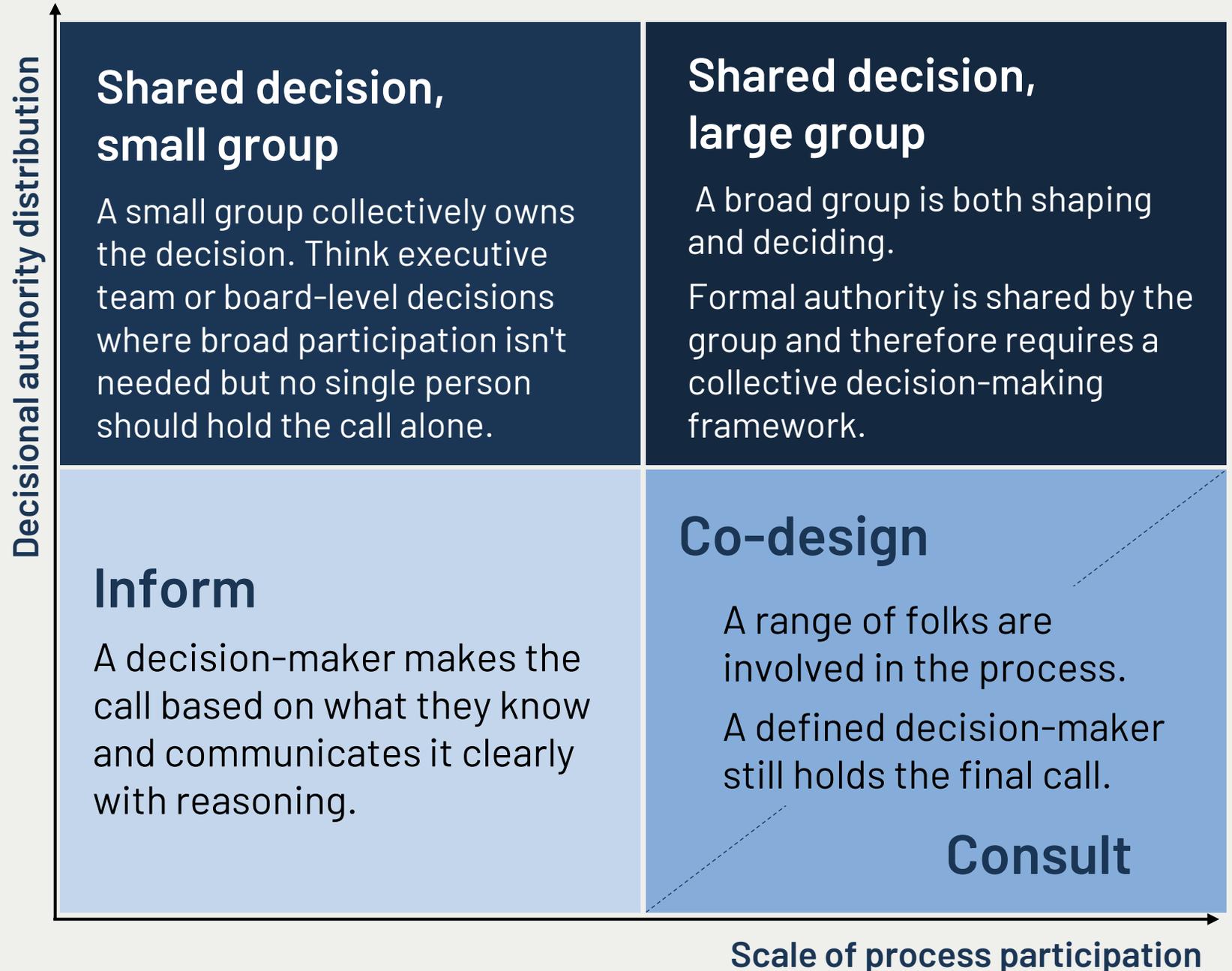
- Decision cuts across multiple functions or levels
- The scope of impact is organization-wide
- Your organizational culture expects and is primed for collaborative decision-making
- The people affected need to genuinely own the outcome for it to work



- Clear individual or role-based accountability (fiduciary, regulatory, personnel)
- Decision sits within one person's or function's mandate
- Confidentiality constraints limit who can have the full picture
- Decision is high-stakes and/or irreversible

Bringing it all together

Depending on how you respond to the previous prompts, here's an integrated framework that helps you think about level of participation and decision-making authority across a range of options.



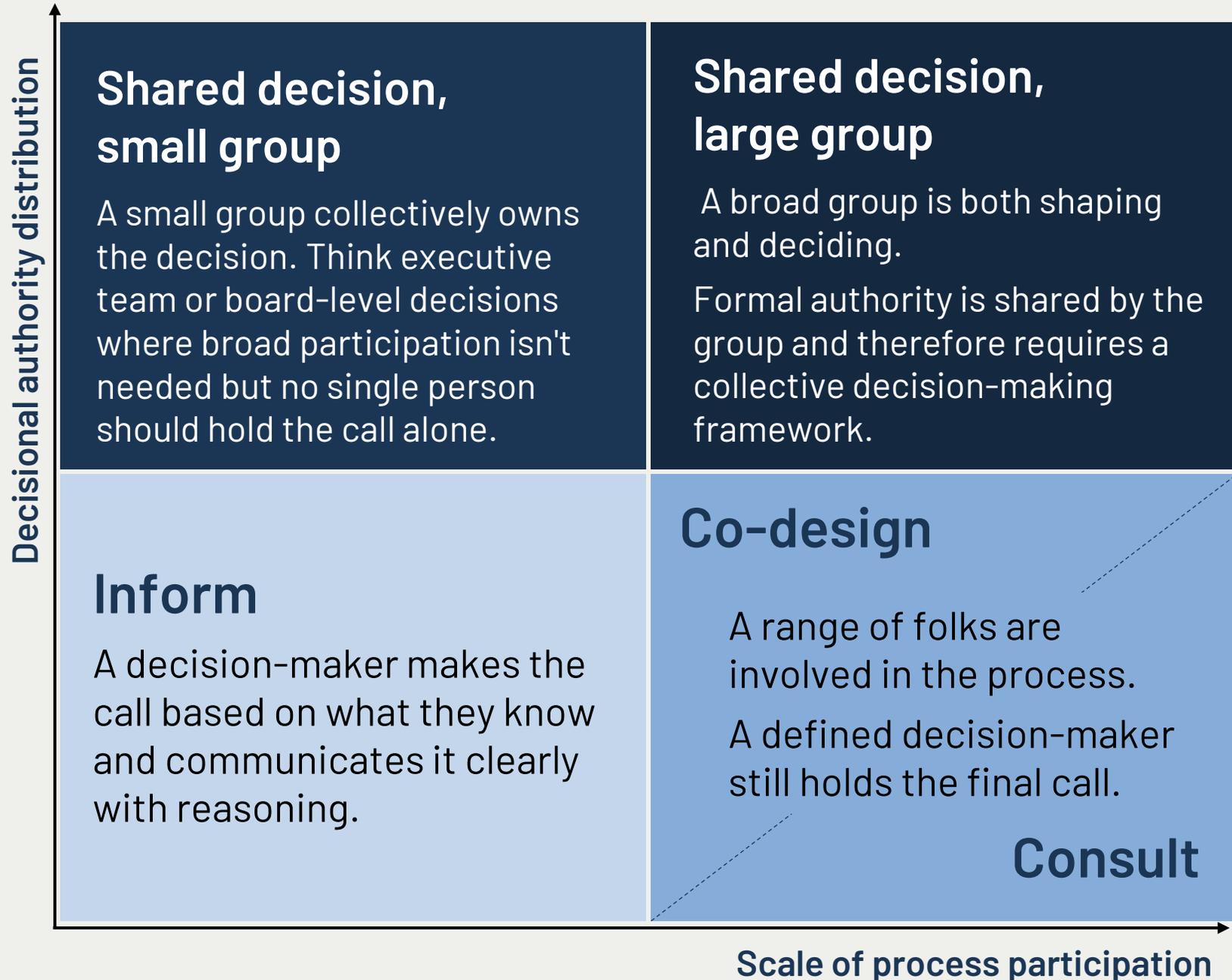
**Experimenting with what
we've learned**

Think about a planning decision you are currently facing, or one you've recently been through.

Using what we've discussed today, think about the following questions.

- How broad should participation be, and why?
- How distributed should authority be, and why?
- Where does that put you on the matrix?

Does this shift anything in how you are thinking about this decision?



What was that like?

- › What did that experience **feel like**?
- › Did anything **surprise** you?
- › What did you **learn**?
- › What **questions** are you left with?

The takeaway

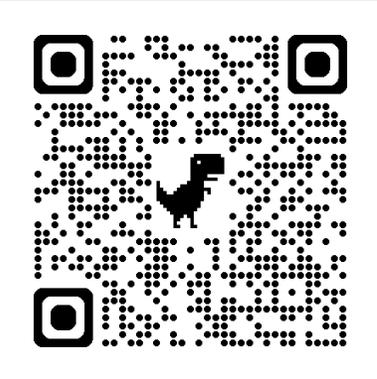
Inclusive planning doesn't mean everybody decides everything. It means being deliberate and transparent about two things: **who participates, and who decides.**

Continuing the conversation



Share feedback

I would love your feedback on this workshop and future topics you'd find valuable – use this QR code to get started!



Get pro bono support

If you want a thought partner to apply what you learned today at your own organization, use this link to sign up for pro-bono office hours!

Thank you!

It was such a pleasure to be here with you today!!



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