

## Checklist:

# *Using Knowledge Mapping to Support Strategic Planning for Your Non Profit*

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This is a step-by-step “checklist” guide with key stages and steps for using an easy Knowledge Mapping approach to support your strategic planning. These practical steps will help you:

- Improve collaboration and communication
- Reduce stress and conflict
- Make better decisions to more reliably attain goals

Find out how this mapping approach makes collaboration and action planning easy.

### Stage One: Create a Collaborative Map of Your Strategic Plan.

Research and our experience have shown that the best maps are created of measurable points (circles) and causal connections (arrows between circles). As individuals, our knowledge maps in our heads—our understandings from our own experience and expertise—include only a small piece of the big picture. However, it is possible (and not too difficult) to bring out the pieces of knowledge held by various individuals within your organization, and integrate those pieces into a more complete map. We’ve used these techniques to support decision-making in a variety of non-profit and business organizations.

The process is more rapid than traditional approaches to strategic planning and the plans are more useful (more effective for making good decisions). This is also a big improvement over old approaches such as brainstorming and dot voting because of the way the map is structured.

#### STEP 1: List key people within your organization.

Typically, this will be your leadership team. Your list may also include experts, senior leaders, emerging leaders, board members, key stakeholders, and people with influence.

□ **STEP 2: Surface their knowledge:**

- Option A: Interview each person. Ask what is important to the organization and its current situation. Then ask what causal connections exist between those important things. Follow-up question may include “What causes more of that (important thing).” “When that thing increases, what changes are caused in other things?”



- Option B: Bring the key people together and use a game-like mapping process such as ASK MATT

<https://askmatt.solutions/> to rapidly and collaboratively create a knowledge map.



□ **STEP 3: Identify the causal statements (this causes that) and diagram them, to create your map.**

Diagram each causal statement, using one circle for each specific cause or effect and arrows to show connections between them. You could do this using paper and pen, an electronic mapping platform, or other tool. Now that you have integrated the perspectives, you have created a whole map – one that is greater than the sum of the parts.

**Stage Two: Apply Your Mapped Strategic Plan**

Looking at your map, you and your collaborators can better understand the shared situation. Thus, you can make better decisions. Each point on the map (circle) represents something important. For example, “number of volunteer hours worked each month.” Using those circles you can identify goals – for example, a specific number of volunteer hours you would like to have worked each month. Looking at the map, and seeing what causal arrows point to that circle, you can see what efforts at other circles (such as recruitment and publicity) will support your goals.



□ **STEP 1: Present and explain your map to your team and partnering organizations.**

- Identify where collaborations and interrelated goals (points on the map) may support shared success.
- Show where loops will support sustainability.
- Note where “leverage points” (circles at the intersection of two or more loops) may be



used as Key Performance Indicators (KPI) for tracking data and measuring progress.

- Point out where knowledge is missing (those points on the map with the fewest arrows pointing to them) where more research is needed (more on this below).

□ **STEP 2: Ask your team and partnering organizations for their insights**

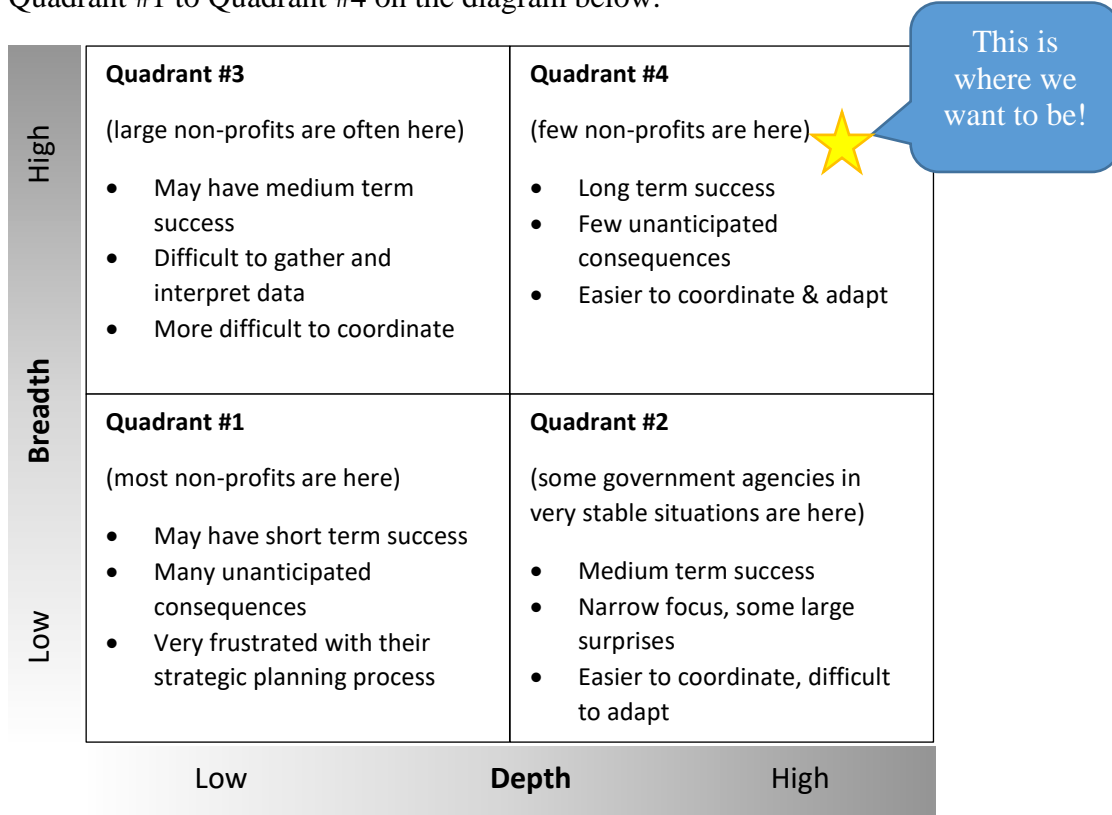
- Which of the goals (circles) on the map are they most focused on? Who might they collaborate with to reach shared short-term and long-term goals?

□ **STEP 3: Making progress**

- Identify KPIs for tracking progress.
- Team members choose and commit to specific action items.
- Follow-up with team members to hold them accountable for their commitments.
- Hold monthly meetings to talk about actions and results.

### STAGE Three: Improve Your Map’s Logical Structure

The continual optimizing of your organization’s mapped strategic plan requires continually improving your knowledge – your understanding of how that plan works and how it connects with its environment. Generally, we can say that a higher level of map structure indicates greater knowledge or understanding. That, in turn, suggests a greater chance of making successful decisions. For most non-profits that means moving from Quadrant #1 to Quadrant #4 on the diagram below.



To get to Quadrant #4, you will want to follow these steps.

□ **STEP 1: Evaluate the structure of the map:**

- Count the number of circles – that number represents the “breadth” of knowledge.
- Count the number of “transformative” circles (those with more than one arrow pointing directly at the circle). Divide the number of transformative circles by the total number of circles. This will give you the “depth” of your knowledge.
- Count the number of loops – more is better!

□ **STEP 2: Conduct additional research and invite more stakeholders to fill gaps in your map.**

- Identify gaps where you need more information
- Collect additional information from reviewing more studies and other information sources and talking with additional knowledgeable stakeholders who can help fill those information gaps



(Note: you can save a ton of money by using existing research and expert insight to create a better map).

□ **STEP 3: Revisit the map every 3-4 months to ask “Has our experience matched the map?”**

- Look at the data you gained from tracking your KPIs.
- Talk about your experiences in taking actions – and gaining the expected results.
- If your experience does not match the map, the map should be changed to reflect your new understanding.
- And... start a new conversation about how that new map can support better decisions, collaborations, and better services for your stakeholders!

## For More Information:

Contact us at [info@meaningfulevidence.com](mailto:info@meaningfulevidence.com) or 703-348-0061 to arrange a conversation. We’ll get on the phone and answer any questions you may have. We’ll also ask you some questions to learn about your specific situation and offer you some practical resources and next steps that may be useful for you.

