



# 7 Considerations for Strategic Planning

We often say to our clients that strategic planning is an art, not a science. It is a process and a learning experience, not just the resulting document. As leaders who drive these processes, we encourage you to consider that what has worked in the past may not be what is needed now. Let's consider starting from a different place by asking different questions about how we share power and decision-making, enable transparency and co-creation, and ultimately, increase participation in learning, reflection, and choice-making.

## 1 Intentionally Plan to Plan

- What are we collectively curious about? What are key areas of learning that we hope to surface in the effort?
- How can we create an initial touch-bases with staff, Board, those impacted by our work, and/or our community partners to inform our strategic plan design and engagement efforts?
- What are possible approaches for deeper engagement and participation of our stakeholders in our process?

---

---

---

---

---

---

---

---

## 2 Expand the Leadership Model that Guides the Process

- What has been our historical approach to leadership of these types of processes?
- Which stakeholder group most influenced our decision-making?
- How open are we to including external voices to our leadership group to guide and oversee the process?
- What would sharing power in the planning process with those impacted by our work look like?

---

---

---

---

---

---

---

---

## 3 Amplify Voices and Perspectives

- What is the current status of our relationships with stakeholders? Both internal and external?
- How can work we with our stakeholders to co-design how they are engaged in the process?
- What supports and/or investments would be needed to support their engagement?

---

---

---

---

---

---

---

---

---

## 4 Ensure Alignment with Diversity, Equity, and Inclusion Efforts

- Reflecting on our current efforts around DEI, where are we making progress? Where do we seem to be making less progress?
- How can we live our DEI aspirations in our planning efforts? What might we need to do differently?
- How can the planning efforts support us in identifying our next set of priorities, learning or efforts related to our DEI aspirations?

---

---

---

---

---

---

---

---

---

## 5 Leverage Technology to Share Information and Co-Create Work

- What technology changes have we made over the last few years?
- What tools have the most traction or been most successful for our organization?
- How could we use these tools to increase transparency, connectivity, communication, and contribution to the planning process?

---

---

---

---

---

---

---

---

---

## 6 Focus on Shared Experiences and Messaging

- How can we engage staff and others in hybrid/virtual opportunities to share common messaging and create spaces for dialogue and input? Enable contributions to decision-making?
- What types of knowledge about our work and/or field can be shared with staff using these tools or approaches?
- What messages can we share throughout the process to signal key milestones in the journey to create the plan?

---

---

---

---

---

---

---

---

---

## 7 Create Powerful Frameworks to Motivate and Monitor Action

- As we seek to capture our choices and strategic direction, who will we want to share that information with?
- How do we capture what we learned to show the connection between our learning and our choice-making?
- How do the documents themselves reflect our culture and aspirations?
- What is the intentional roll-out strategy of our strategic plan? With whom do we want to share our aspirations?

---

---

---

---

---

---

---

---