7 Considerations *for* Strategic Planning

SUMMARY

Key considerations that nonprofit leaders can lean into when thinking about their next strategic planning effort.

We often say to our clients that strategic planning is a process and a learning experience, not just the resulting document. How we share power in that process and increase transparency and participation in the learning, reflection, and choice-making involved is changing.

Fio Partners typically supports 25-30 planning projects per year. We partner with our clients to design and implement these processes in alignment with their values and aspirations. Across this work, a few key considerations have emerged in recent years that nonprofit leaders can lean into when thinking about their next strategic planning effort.

1 Intentionally Plan to Plan

Process matters. A process combines information, experiences, and communications associated with a collective effort. Increasingly, our clients engage stakeholders in an early-stage discovery process to create guiding principles to support and inform their planning process design.

A guiding principle helps describe how a group will undertake its work, not what it will accomplish —It guides how individuals should behave (group norms) and what criteria will support decision-making (process expectations). Early-stage stakeholder engagement can also identify critical issues to address, inform the process' learning agenda, and clarify how stakeholders prefer to be engaged.

Key questions to explore:

- What are we collectively curious about? What are areas of learning that we hope to surface?

- How can we create an initial touch-base 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?

- What are the guiding principles that will support us throughout the process?

2 Expand the Leadership Model to Guide the Process

One of the most common questions we're asked is: "Who leads the process? Staff? Board? Combo?" A few years ago, we might note that in smaller organizations, strategic planning is typically a Board-driven process that involves staff leaders; and in larger organizations, the senior management team usually leads, and the Board serves in an advisory role. Now, we increasingly see interest in breaking down and reimagining these "top-down leader-driven" planning models.

Our clients are exploring models of planning that are inclusive of a range of different stakeholders like:

- Key staff-both in leadership positions and front-line staff
- Those impacted by the organizations' work (with compensation)
- Community or external partner organization representatives
- Community leaders and/or residents who may not receive services
- Other external advisors

Organizations are exploring models that engage these stakeholder groups and create tables for shared decision-making.

Key questions to explore:

- 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 in 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

Typical planning models primarily include the voices of the Board and senior staff, with limited involvement of all staff and those impacted by the organization's work. If consistent engagement, feedback, and participation of these stakeholders is not common practice, organizations can use the planning process to build this muscle and deepen relationships. The key is to recognize that trust fosters relationships—and trust does not emerge from one-time, transactional interactions but builds over time. To that end, consider that new engagement programs created for the planning process can live beyond the project, continuing to deepen relationships and inform organizational learning and responsiveness.

What might engagement programs entail? Organizations can use large-scale online meetings, staff surveys, middle manager focus groups, team huddles, and reflection sessions to weave staff voice into the process. They can also map and assess their current relationships with those impacted by the organization's work and broader community members and partners, envision the future status of those relationships, and explore new approaches to listening and building trust over time. Many of our clients also commit to compensation for clients and community members involved in strategic planning, offering stipends and expense reimbursement.

A word of caution: Organizations often assume their approach is "how people want to be engaged" without actually asking those individuals. We encourage co-creating the engagement model with each stakeholder group, giving them the power to decide what involvement looks like.

Key questions for leaders to consider:

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

4 Ensure Alignment with DEIA Efforts

Many organizations have undertaken work around racial equity or diversity, equity, inclusion, and accessibility over the last two to three years. How much time they have invested as a staff team and as a board, and how far they have progressed their own DEI agenda varies greatly. The challenge is that, in some cases, DEIA efforts are seen as separate or distinct from strategic planning—yet, these processes are deeply intertwined. How an organization lives its values related to DEIA must show up in the design and development of its strategic plan.

Holding racial equity at the center of the planning process influences all elements of the process design and sets the standard for including stakeholders and amplifying historically marginalized voices.

Key questions for leaders to consider:

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

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

COVID-19 forced nonprofit organizations to quickly increase their technology infrastructure and skills to support working and delivering services virtually. They are now much more comfortable with systems for virtual meetings, file sharing, collaborative writing, project management, and survey distribution and analysis. Organizations can leverage these skills and systems to support strategic planning. For example:

- Virtual meetings and focus groups via Google Meets, Microsoft Teams, or ZOOM are often more convenient for people with barriers to in-person participation (whether due to travel, child care, or busyness) or from a larger geographic area.

- Digital whiteboards like Google JamBoard can replace traditional flip charts and post-it notes, enabling individual contributions to virtual brainstorming or feedback sessions.

- File-sharing platforms like Dropbox or Google Drive improve transparency through access to key information.

- Spaces like Basecamp or Slack can support discussion and coordination between planning sessions and meetings.

- Tools like Google Docs and Microsoft 365 facilitate collaborative writing and commenting.

Key questions for leaders to consider:

- What technology changes have we made over the last few years?

- What tools have the most traction or success 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

Historically, nonprofits struggled to create spaces to share common messages and experiences, especially organizations with multiple sites or offices. In the for-profit sector, resources are available for full- and multi-day offsite experiences, complete with inspirational speakers and time to connect. Most nonprofits could not similarly invest in messaging and team building across locations and departments—but that also changed with COVID and the sector's rapid adoption of technology.

As organizations undertake planning, we see increased use of remote and hybrid models to engage staff, gather input, and share common messages. These types of shared experiences allow leaders to share updates and learning from the process, create safe spaces for staff dialogue and reflection, and staff engagement staff in the planning process. These shared experiences can set a celebratory stage for the ability to learn together, choose together, and value the voices of a wider range of stakeholders.

Key questions for leaders to consider:

- 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 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?
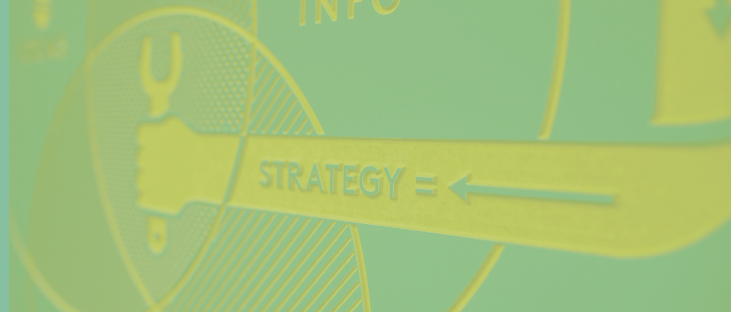
(7) Create Powerful Frameworks to Guide Decision-Making and Monitor Progress

The historical image of the strategic plan as the binder on the shelf that no one ever looks at is hopefully shifting. What emerges from participatory processes are transformational strategic plans that motivate staff, Board, and external supporters. Increasingly, our clients develop high-level strategic frameworks with powerful aspirations, articulations of their values and beliefs, bold goals and supporting strategies to advance the work, and measurable key results. Different versions are created for external and internal audiences with the appropriate amount of detail to motivate support and guide action.

Clients are also embedding the strategic plan in ongoing discussions, structures, and practices of the organization during the implementation phases. From learning sessions with staff tied to strategic aspirations and ongoing reflections on values, to annual work plans and KPI dashboards, organizations are exploring what it means to actually "live" their strategic plan.

Key questions for leaders to consider:

• As we seek to capture our choices and strategic direction, what audiences will we want to share that information with?

• How do we capture what we learned to show the connection between our learning and 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?

• How will we operationalize the plan and report on our progress? When will we discuss what we're learning as we implement the plan and continue to iterate?

Looking ahead

As leaders who drive strategic planning processes, we encourage you to consider that what has worked in the past is not what is needed now. We encourage you to share power and decision-making with a larger group of invested individuals, use technology to promote transparency and co-creation, and increase participation in the learning, reflection, and choice-making that will forge your organization's future.

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