Since 2007, Fio Partners has worked with more than 500 nonprofit organizations, foundations, and government entities nationally.
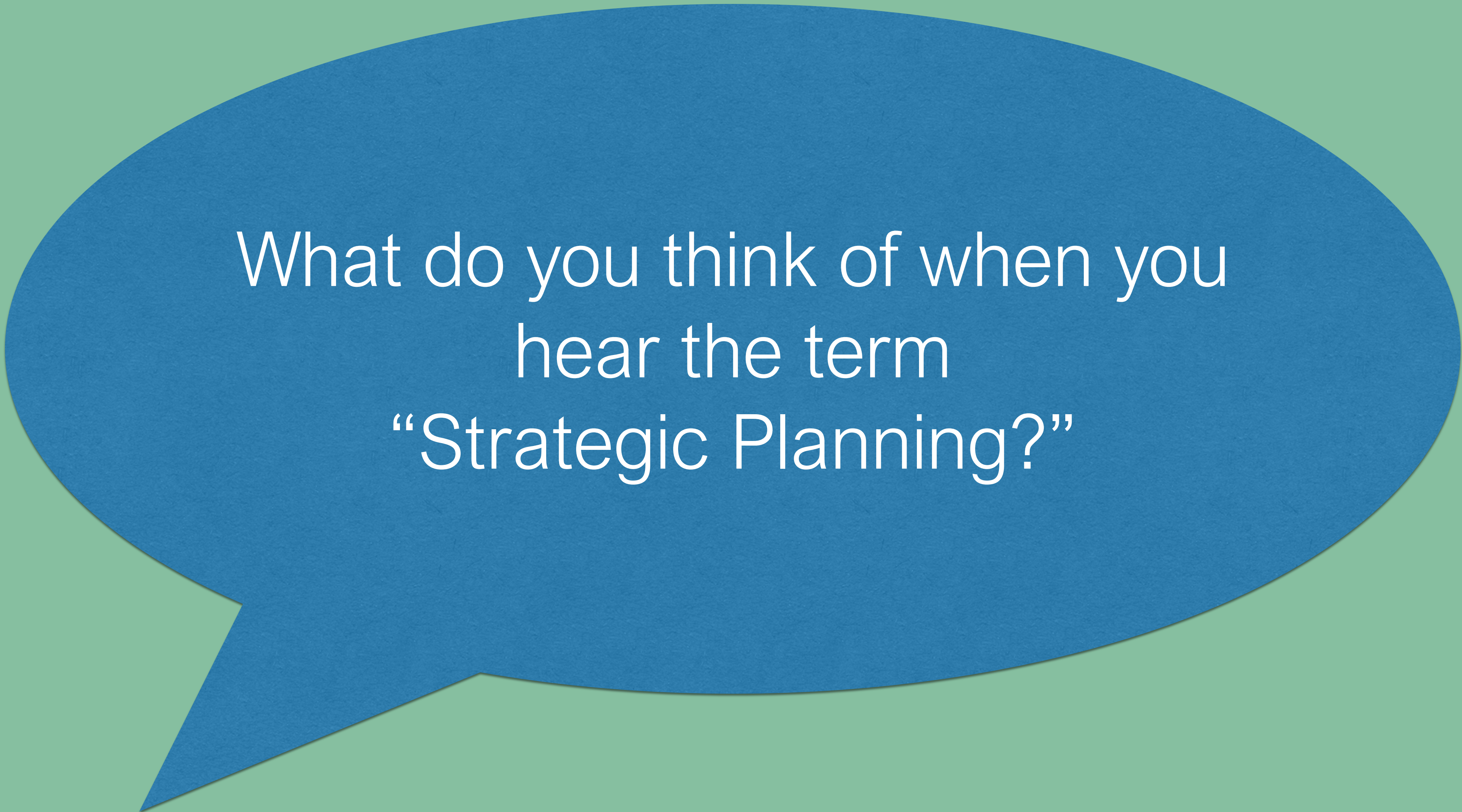
Anne Yurasek, Principal

Anne has been an organizational development consultant and trainer for over twenty years in the nonprofit and private sector. She is the Managing Partner of Fio.

Anne has an MBA in Management from Columbia University and a Bachelors Degree in Psychology from Wellesley College.

And you!

Learning Objectives

- Provide an overview of strategic planning process and considerations

- Explore approaches to share power with community members in the planning process and to increase transparency and participation in the learning, reflection, and choice-making

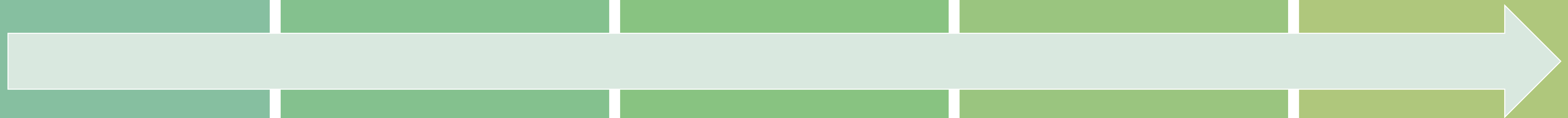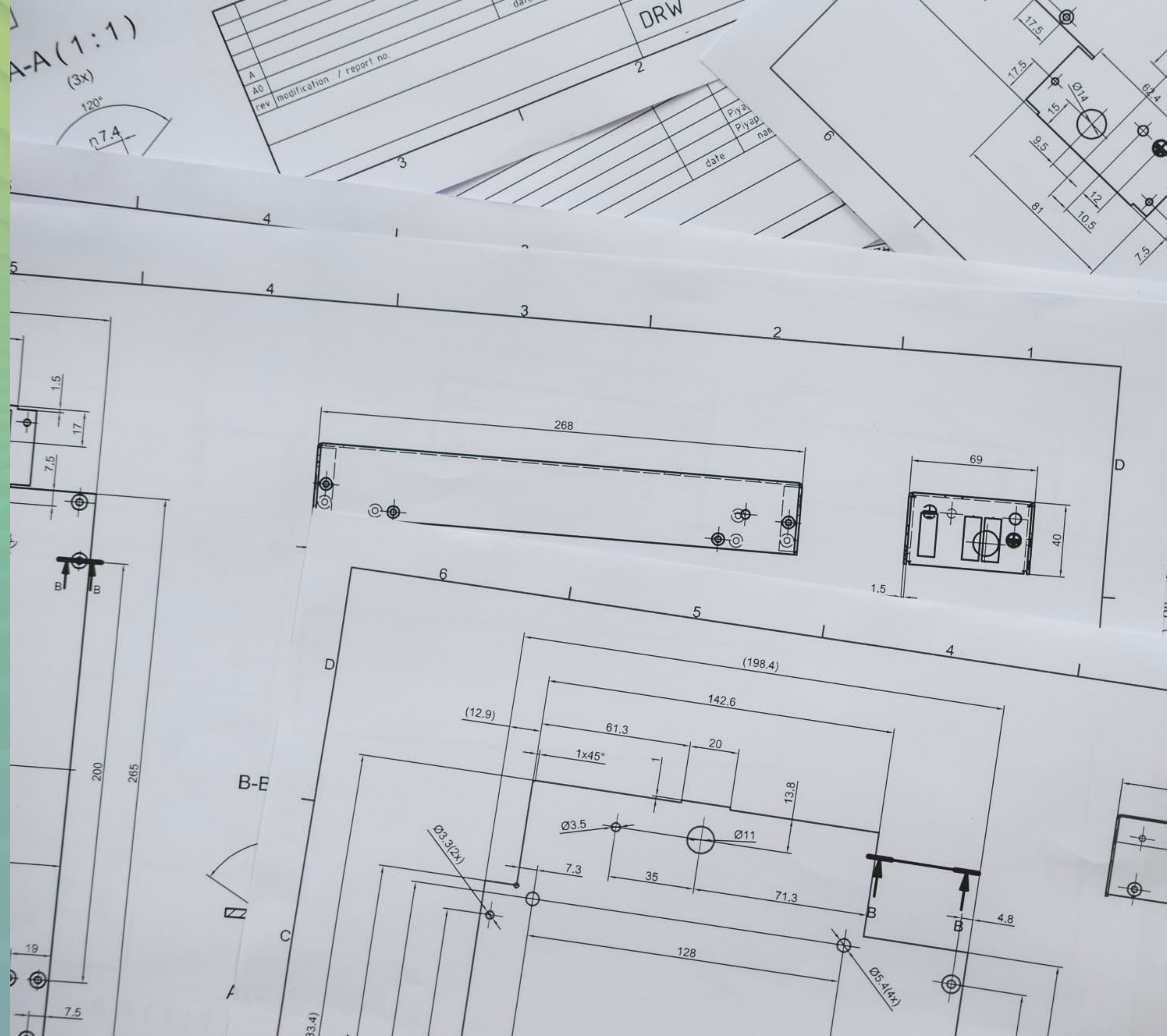**Planning to Plan** | **Process Design to Drive Engagement & Learning** | **Developing Strategy** | **Developing the Plan** | **Moving to Implementation**

Intentionally Plan to Plan

Intentionally Plan to Plan

Reflections for Leaders:

- 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-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?

Typical Approach & Timeline

Process Design

Information Gathering & Synthesis

Strategy Development & Choice Making

Plan Development

Implementation Supports
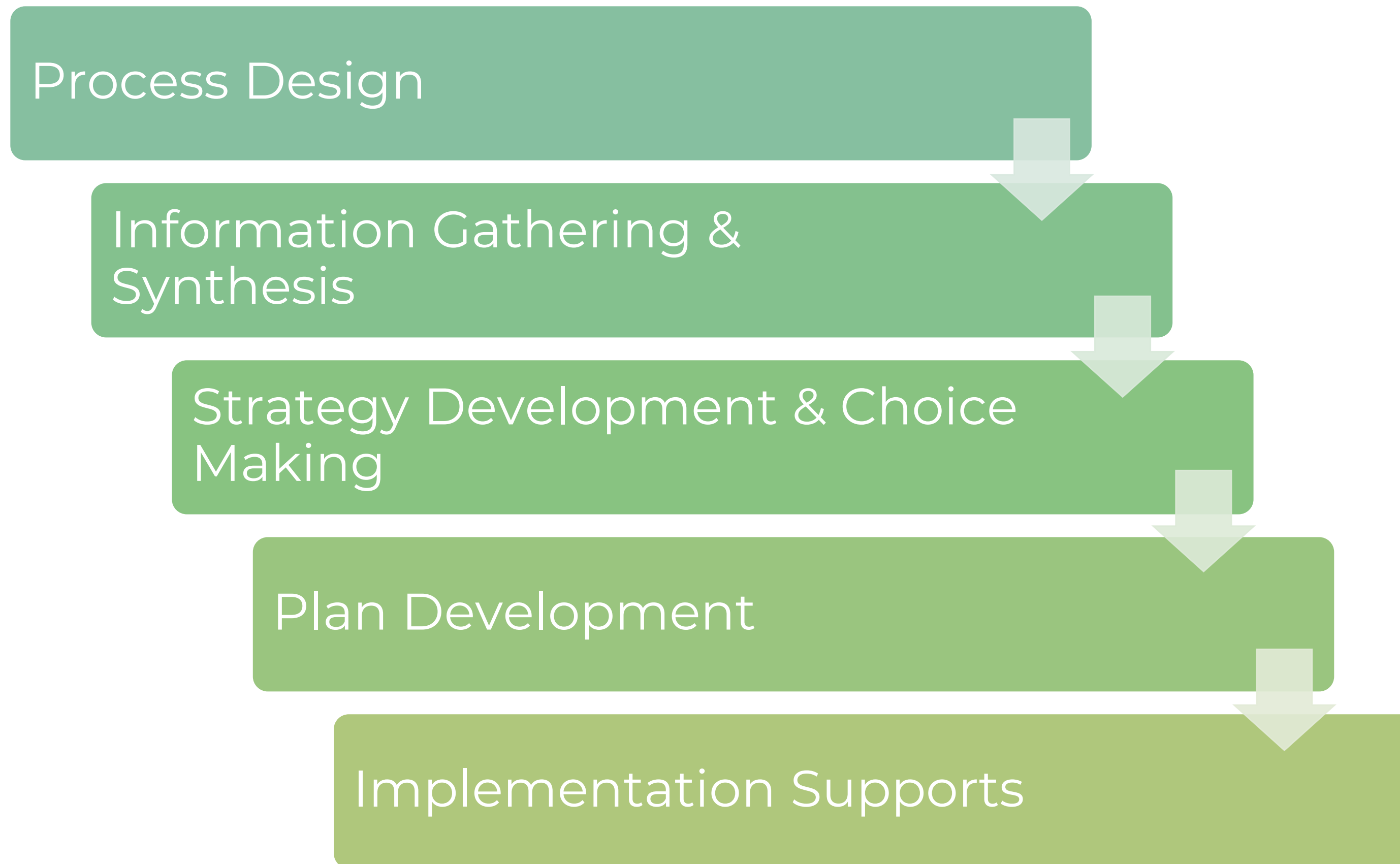
Driven by Size of Information Base and Level of Involvement of Board of Directors

Range: 6 months – 9 months

Typically should not be longer than 9 months (post-proposal); unless there are extenuating circumstances

Seasonality can also matter

Initial Questions to Explore

- When was the **last plan completed**?
- **How was that process received** by Board, staff, community?
- **How was the prior plan utilized** to support the organization?
- What was **accomplished** in the earlier plan? What was **left undone**? Why?
- What are the **critical issues that the planning process should address**?

Alignment with Diversity, Equity, and Inclusion Efforts

Ensure Alignment with DEI Efforts

Reflections for Leaders:

- 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?

Leadership Model that Guides the Process

Expand the Leadership Model that Guides the Process

Reflections for Leaders:

- 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?

Exploring Vantage Points – Common Approach

Board of Directors →

- Oversight of Effort
- Trends in Information
- Framework for Planning

Planning Committee →

- Project Completion
- Review of Interim Deliverables
- Participation

Executive Director →

- Expert on Organization/ Field
- Provide Information
- Oversee Participation of Staff in Process
- Manage Consultant Relationship

Staff →

- Provide Input
- Provide Program and Functional expertise

How is power reflected in the roles?

How can power be shared in the process?

How can you expand this model?

Role of Consultants

This is an art not a science!

Philosophy matters.

- Helpfulness of third-party facilitator and resource
- Importance of "fit"
- Range of expertise
- Importance of references and reference checking
- Examples of addressing similar organizational challenges

Process Design to Drive Engagement & Learning

fiō

Curiosity and learning.

Designing the Experience

- Small committee meetings (in-person vs. virtual)

- Board meetings

- Staff meetings – All-Staff, Department/Program

- Large Board retreats – Multiple? One?

- Combination of approaches

- **Will vary!**

Amplify Voices and Perspectives

Amplify Voices and Perspectives

Reflections for Leaders:

- 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 engagement?

Designing the Information Base:

Fio Partners Scoping Document

- Information base elements

- Responsibility/Involvement

  - Important to consider what internal resources may be available to support the effort

- Captures depth/breadth of information base

Designing the Information Base: Internal Assessment

- Financial analysis - organizational level
- Organizational performance and future opportunities – achievements, financial, evaluative, trends, opportunities
- Climate survey of staff (other approaches for staff listening and engagement) or if all-volunteer, volunteer survey/input
- Board of Directors survey
- Assessment of management systems (financials, human resources, risk management, etc.)
- Review of health of relational strategy (marketing, system, and funding)

Designing the Information Base: External Assessment

- Field trends/industry emerging practices and geographic trends (environmental scan)

- Market information

- System study (looking at similar providers in a shared geographic area)

- Stakeholder perspectives (community members, experts, key partners, funders, community leadership, government)

- Competitor analysis

Focus on Shared Experiences and Messaging

Focus on Shared Experiences & Messaging

Reflections for Leaders:

- How can we engage community members 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 our community using these tools or approaches?

- What **messages** can we share throughout the process to signal key milestones in the journey to create the plan?

Lead with your work.

Strategic Management Framework

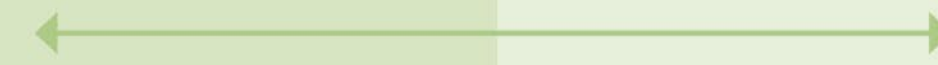All four tasks take place with continuous input and interaction with the organization's environment.

1

ALIGN BOARD & STAFF LEADERSHIP

on mission, vision, and values including commitments to equity and strategic management

2

(RE)DESIGN THE CORE

Programmatic Strategies

- Programmatic Mix
- Equity Frameworks
- Goals, Strategies, Tactics & Outcomes

Relational Strategies

- Systems Participation
- Branding & Marketing
- Fund Development
- Advocacy

3

ENSURE SUFFICIENT INFRASTRUCTURE

- Financial Management
- Human Resources
- Equity Policies & Practices
- Information Management
- Risk Management
- Physical Plant

4

ENACT WAYS TO IMPROVE THE ORGANIZATION
Organizational Learning • Quality Assurance • Equity Monitoring

Tools to Support Programmatic Strategy Design

- Theory of Change

- Logic Models

- Products & Services Matrixes

- Scenario Planning

What is the impact you seek to achieve?

How does your work drive that impact?

How does your work need to evolve based on your learning in the process?

Create Powerful Frameworks to Motivate and Monitor Action

Developing the Plan

- **What You Learned In the Process**

- **Mission, Vision, Values, and Beliefs**
  - Mission: Means and Outcomes
  - Vision for Those We Serve (or Our Community)
  - Vision for Our Organization
  - Beliefs That Underpin Our Work
  - Values to Guide How We Behave

- **Strategic Goals**
  - Programmatic
  - Relational Strategy
  - Supports and Safeguards
  - Learning and Quality Assurance
  - Leadership

- **Supporting Strategies and Proposed Tactics**

- **Key Results to Be Achieved**

Moving to Implementation

- **Create implementation plan** (overall guide for timeline of effort)

- **Develop annual plan** each year based off of multi-year framework (for Board and ED); review and update annually against full plan

- **Create dashboard on key results** and report quarterly on progress

- **Link plan reporting to pre-existing systems and structures** (Board committee goals, Executive Director reporting, Board reporting and agendas)

- **Build transparent tools** to track progress (Google Docs, internal website

Q & A

Thank you!
Keep in touch!

Anne Yurasek, Principal
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Land Conservation Council

Share your thoughts! Scan the QR codes below to fill out evaluations online for the 2024 Connecticut Land Conservation Conference

General Conference Evaluations   Workshop Evaluations