



# strategic planning

## **we're a little different -- we don't provide pre-boxed packages**

we purposefully provide truly tailored work for each organization. this sheet is therefore merely to get the conversation started and to give you an idea of what could go into strategic planning with your organization.  
**we'll talk about your budget and needs and craft a custom Scope of Work.**

(PLEASE INQUIRE ABOUT REDUCED PRICING FOR SMALL NONPROFITS AND BUSINESSES)

### ◆ **what we believe**

- strategic planning should be owned and driven by the *entire* board (with full staff input) and *facilitated* by the external expert -- we don't create your plan for you.
- strategic plans should be around 5 years in length -- too short and you risk strategizing fatigue + confusing operational plans with strategy -- too long and the plan becomes irrelevant.
- strategic plans should be nimble to adjust to changing opportunities and challenges.
- strategic plans need an accountability mechanism.
- we'll follow best practices in Diversity, Equity, Inclusion, Accessibility, Belonging, and Justice through the whole process.

### ◆ **making it real**

- we'll help you find the balance between ambition and reality and help you determine your risk tolerance.
- we'll help hold you to what is budgetarily possible without burning out staff or cutting too many corners.

### ◆ **the process should be transformative & fun**

- interactive, workshop-style board + staff retreats (in-person and virtual) to build the Plan.
- revisiting mission, vision, and values and checking for alignment and forward evolution.
- dusting off skeletons from the closet and facing those elephants in the room to achieve breakthrough,

### ◆ **tailoring it for you**

- we'll review your organization's past and present, from an external and internal perspective.
  - we'll review the greater ecosystem in which your organization works and its particular value add.
  - we'll have regular check-ins to make sure we're working in sync.
- depending on your SOW, you'll get:
- summary notes from all retreats and consultations.
  - tailored stakeholder survey and interviews, analysis, and recommendations.
  - a Strategic Plan Framework and suggested Accountability Plan.
  - an Annual Operational Plan Framework tied to the Strategic Plan.
  - revised mission, vision, and values.
  - notes and recommendations on operational/fundraising/staffing impact.
  - tailored staff input survey and interviews and analysis and recommendations.

## strategic planning works better with an external consultant

- they can address the elephants in the room in a way no one on the board or staff can do
- they can see the forest through the trees better than someone living the day-to-day of the organization
- they have experience across a range of organizations, giving them extra insight from which your org will benefit
- they can guide existential conversations that challenge, deepen, and strengthen your organization the way no insider can do