



# strategic planning

## we're a little different

we push your organization to be its best and don't just tell you what you want to hear  
we don't just facilitate – we guide and support, drawing on decades of experience  
we believe that your team \*must\* be in the driver's seat for your strategic plan to take root – we will never create a strategic plan for you

**we'll talk about your budget and needs and craft a custom Scope of Work.**

### ✦ 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 3-5 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.
- the whole process and end results should follow best practices in Diversity, Equity, Inclusion, Accessibility, Belonging, and Justice (DEIJB).

### ✦ 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.
- we'll make sure you can reasonably track progress and that you have milestone moments where you check-in on whether the Plan needs adjustment as you go.

### ✦ 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.
- we'll make sure all voices are heard with staff input survey and interviews, board survey and interviews, stakeholder survey and interviews, and, where relevant, inviting those voices directly to the table.
- we'll recommend a DEIJB audit where necessary.
- we'll do scenario planning for unexpected negative or positive shocks.

Pricing depends on your specific Scope of Work.  
**Looking for budget-friendly options for small nonprofits? [Click here!](#)**

## 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

# How it Works

This is a generalized, oversimplified example. The process for you depends on your SOW, timeline, team capacities, etc.

## Van Waes Consulting

## Client Strategic Planning Task Force

## Client Full Board + Staff

we stay in communication throughout

creates Strategic Planning Project Tracker & sends onboarding materials

provides Strategic Planning Guide

prepares Board + Staff & Stakeholder Surveys & Interview processes

analyzes surveys, conducts interviews, performs SWOT analysis & other contextual research

facilitates Retreat 1: workshopping the Org's Niche, Mission, Vision, & Values

uses surveys, etc. to draft Strategic Plan Elements: Outcome Goals, Progress Tracker, Program ROI & mapping to Goals, Decision-Making Rubric, & Scenario Planning

facilitates Retreat 2: workshopping the above and coming to group consensus

sends group-approved, finalized Strategic Plan Elements

holds "office hours" 6-8 weeks after Retreat 2 to answer Qs about implementation

provides relevant documents to VWC (Employee Handbook, former Strategic Plan, Bylaws, financial statements, etc.)

approves survey & process; prepares stakeholder lists & sends surveys out

reviews preview of contextual & stakeholder analysis; approves Retreat 1 agenda; preps retreat logistics

approves Retreat 2 agenda & preps logistics

distributes finalized Strategic Plan to whole team

forms a 5 person Board + Staff Strategic Planning Task Force

reviews Guide to get an overview of how the Strategic Planning will work

answers surveys & participates in interviews

participates in Retreat 1

participates in Retreat 2

participates in Office Hours

Retreats can be virtual or in-person

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