A pragmatic approach to
STRATEGIC PLANNING
for small organizations

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THE JOURNEY

Your organization's strategic plan should be as intuitive as a roadmap. We'll help you identify the specific crossroads your organization needs to navigate, make some clear decisions about which direction to choose, and map out the actual steps that will get you moving. The three stages of the journey will be recorded in a project document that will form the basis for your internal strategic plan.

Our organization is at a crossroads. We're ready to craft a vision for the future and we're wondering where we 'grow' from here.

360 Engagement

**Strategic Conversations**

Next Steps Planning Map

We took the time to understand the diverse perspectives of our staff, board, members and partners, and used this collective wisdom to inform our decisions.

We thoroughly explored all possible directions, and we've made clear, strategic decisions about how to navigate the crossroads.

We know what our turning points are, and we've mapped out our next steps. We are ready to move forward with clarity and confidence.

360 ENGAGEMENT
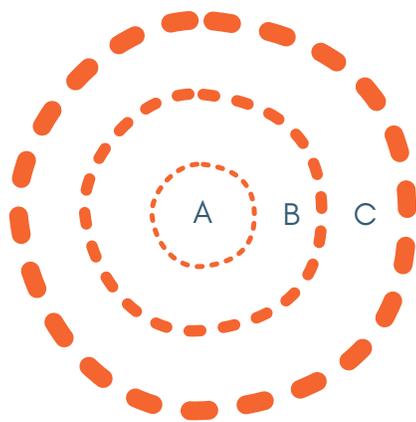
We begin the journey by engaging with key communities to get the 'lay of the land.' We're looking to spark open-ended conversations that are diverse, unfiltered and challenging, through surveys, 1:1 conversations, and focus groups if needed.

The data from this engagement process will help identify and clarify your 'crossroads', the important decisions that need to be made about your organization's future. The insight and crossroads will be captured in Part 1 of the project documentation.

Who	Key Questions	How
A - Staff and Board	Tensions and opportunities related to the what, when, where, why and how of your work.	• questionnaire • up to 6 1:1 conversations • workshop, if needed
B - Partners and close supporters	Tensions and opportunities related to they what, when, where, why and how of your work + priority areas for sector.	• questionnaire • up to 4 1:1 conversations
C - Clients, members and beyond	Priority areas for sub-sectors and sector as a whole.	• questionnaire • focus group, if needed

STRATEGIC CONVERSATIONS

one strategic decision

possible directions
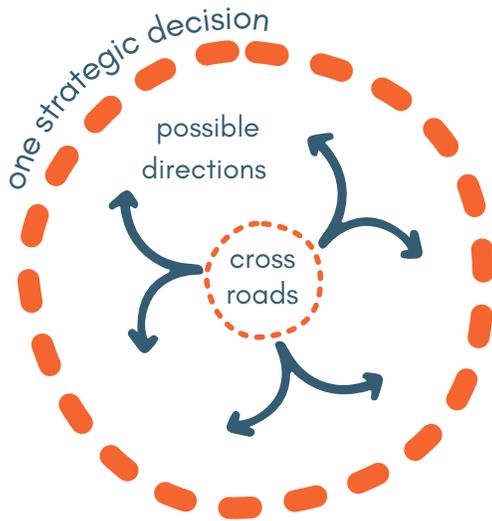
cross roads

During this part of the journey, we host three strategic conversations, each organized around one 'crossroad'.

Each conversation will involve four parts: building consensus on the strategic decision to be made; exploring possible directions; evaluating viable options; and finally, a decision will be made. The outcome of the strategic conversations will be three strategic directions.

The process and decisions will be carefully recorded and included in Part 2 of the project documentation.

3 Strategic Conversations

Crossroads 1	Crossroads 2	Crossroads 3
> explore possible directions	> explore possible directions	> explore possible directions
> choose one way forward	> choose one way forward	> choose one way forward

3 Strategic Directions

NEXT STEPS PLANNING MAP

Rather than try to draw a fixed map for a changing landscape, we'll use an emergent strategy approach that allows us to plan next steps while creating space to adapting to change as it arises.

For each strategic direction, we'll identify the resources needed, plot out the first operational and governance tasks required to get started, and identify important checkpoints that will be used to monitor progress.

We'll create a planning map to guide implementation and evaluation for each strategic direction, and outline it with relevant timelines in Part 3 of the project documentation.

3 Strategic Directions

Packing List

> identify resources needed to get started and keep moving in the righ direction

First Steps

> plot out the key roles and tasks needed to create forward momentum

Milestones

> identify important checkpoints to help course-correct and track progress

Implementation and Evaluation Plan