

Strategy Development

I have been supporting nonprofits and foundations to clarify their vision, impact, strategy, and business model for over 30 years. The strategy “bucket” might include some or all of the following:

- Long term vision
- Impact and outcomes statements
- Business model options and implications
- Implementation planning
- Growth and scaling plans
- Turn-around plans
- Market analysis and operating context
- Org charts and staffing plans
- Partnerships and collaborations
- Theory of Change and Logic Models
- Strategic priorities
- 3-5 year plans
- Decision-making criteria
- Capacity building
- Projections and pro formas
- Core competencies and value proposition
- Governance refinements
- Evaluation, benchmarks and KPIs

Typical Methods and Rhythms

Most strategy engagements have a natural flow that moves from Design, to Discovery, to Decision Making, to Documenting and Doing. However, in reality, many times these processes interact more like iterative feedback loops such that the exploration activities further inform the key design questions, or certain decisions require additional feedback from stakeholders. Thus, the flow tends to be a bit more organic and we continuously check in with what is needed in the moment to best serve our goals.

The activities, roles and timeline will be informed by the first Designing phase.

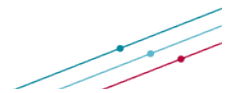
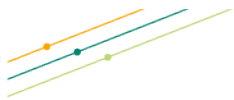
Once the project is underway, it is typical that I meet weekly with the project lead(s) through check-ins and working sessions to provide a consistent flow of momentum, problem solving, ideation, and progress.

Designing:

As we begin the project, we will launch with 1-2 meetings to review the objectives and design an optimal pathway to achieve these goals. This meeting will also provide us with additional context, allow us to map out the conditions for an ideal partnership, and ensure we have clarity on all steps, roles, and timing.

We will discuss:

- What questions do we seek to answer during this process?
- How will we know the process has been successful?
- Who are the various stakeholders as well as their interests, motivations, and greatest possible contribution?
- What do we want to model during this process? How will we be signaling alignment with our values and culture?
- What are our timeline and budget considerations?
- What other process considerations do we need to account for, and what can we leverage (e.g., existing meetings or gatherings, periods of limited time availability, etc.)?



Based on this discussion, we will develop a process road map that works to achieve your goals. We will document roles, activities, timelines, and key meetings so that key stakeholders will have clarity on the process.

Discovering:

This is a period of opening up perspectives and gathering ideas and options.

We start with ensuring a shared understanding of your history and “current state”. We will begin this exploration phase by reviewing any existing data that inform our key questions. We will ensure you have a clear understanding of your core programs and their impact, and the business model and financial dynamics of your products and services. We will identify your organization’s core competencies and how you gather evidence of your impact.

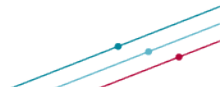
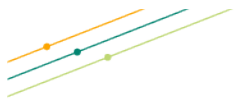
With this shared understanding of the “baseline, we will begin to test various assumptions and re-examine underlying habits or norms. We will identify what additional data will inform the organization’s key questions. We will design engagement methods for various stakeholders. These may include activities such as interviews, focus groups, surveys, data gathering and analysis, market research, facilitated discussions at existing meetings, panels or presentations, or whatever else will best serve your goals. During this phase we will explore various options, tradeoffs, and implications for your future. The goal for this phase is to do enough exploring to open up perspectives and ideas, and to reach an appropriate “burden of proof” for principled decision making – without getting bogged down in process for process’ sake.

Discerning and Deciding:

This phase is focused on vetting and coming to conclusions. Some of these decisions may feel “final”; other options may include identifying pilots or further tests and then deciding down the road. Either way, during the earlier phases we begin explicitly mapping decision factors so that when we reach this stage we are prepared to make sense of our explorations, engage in solid critical thinking, and come to principled conclusions that can be well articulated and supported. As we map the stakeholders in the Design phase, we will clarify the role each has in decision making so that this stage goes smoothly. During this phase we frequently develop and document criteria that will inform future priorities and decision-making.

Documenting and Doing:

This final phase continues the momentum of the prior stages by putting together clear priorities, action plans, responsibilities and timelines. This phase includes the final documentation of the vision and strategy framework, key goals and priorities, and conditions for success. We will discuss and document how and when the team will check in on progress and adjust the plan as needed. This phase will also finalize key indicators of progress that will provide evidence of success as things roll out. This frequently includes more specific outputs such as how the org chart will evolve over time, financial projections, systems that need to be implemented, integrating the strategy into annual budgeting and performance management, and similar operational elements. This phase may transition into ongoing implementation or change management coaching or support.



100% Customized to Your Needs

Each client has unique goals and thus our strategy work is designed based on your needs, not a pre-determined process. Many times a client needs only one or a select few items from the list at the top of this document rather than a full strategy process that includes every element. Some clients want to come out of the process with a one-page strategic framework, others a complete suite of deliverables. The scale and scope of each project is designed according to how each client defines success.

Our advisory services have ranged from a 2-day strategy sprint with only the CEO, to a year-long process involving extensive stakeholders, with costs under \$10,000 to over \$300,000. If you have a specific grant amount or planning budget we can work with you to define the scope and roles within those constraints. It is common to get started with the Design phase and using that to inform a final scope of work and fee.

Our goal is to leverage and develop your internal expertise as we go, so the work is truly yours and not dependent on any external consultant. Typically we find that by the time a new strategy is officially adopted by the board it is already being integrated into the team's thinking, decision making, day-to-day priorities, and budget. If a strategic plan "sits on the shelf", we would argue that that plan suffered from a profoundly bad development process.