

# Our Approach to Strategic Planning



## 1 Collaborate to Determine What We Need to Learn

We follow a **participatory approach**, which starts with increasing our client's buy-in and ownership. We work with our client to determine the **research questions** we want to answer before creating a new strategic plan, as well as all the key partners to engage in the strategic planning process.



## 2 Analyze the Organization and Landscape

We ground the strategic planning process in **data**. We pull our client's historical data to review trends, and we utilize publicly sourced data to understand the community and its needs. We solicit feedback from staff, board members, and partners regarding our client's strengths and opportunities for growth.



## 3 Facilitate Consensus

Before turning the data, research, and identified best practices into a plan for our clients, we gather the board, key staff, and other partners for a planning retreat to facilitate **consensus** on the new strategic direction. We work with the team to analyze the data and information using their perspective and expertise—**collectively** determining key goals and strategies.



## 4 Create the Strategic Plan

We design a **visually appealing strategic plan** that can be shared externally as a public-facing document. We also develop an **implementation plan** that can be used internally to monitor progress. We also support our clients in **communicating** their new strategic plan.

