



Participation-Based Strategic Planning

“Who should we include in our strategic planning?” Is a question we are often asked by prospective clients. We advocate for an inclusive process that is neither insular nor confined to the board or executive level. We call this participation-based planning and we think it is a superior approach.

Board members are the keepers of the vision while the staff executes on that vision. Simply put: the board decides what should be done; the staff decide how it should be done. This is the fundamental difference between governance and operations and we need both perspectives for a cogent plan that works.

We encourage at least one joint visioning meeting with board and staff; sometimes the groups prefer to meet separately. We’ve found that getting board and staff members in the same room to collectively create the future has powerful benefits beyond the plan that results. This teamwork allows staff to understand the role of board members and board

members, in turn, develop a deeper understanding of and appreciation for their staff. We often hear from board members that they weren’t previously aware of the unique talents and dedication of the staff until they participated in a planning day. Team members frequently comment that they deepened relationships in the process. Strong relationships help to get things done.

By far, one of the most effective ways to engage staff in executing on a plan is to include them in the creation of the plan. We lead teams through a series of meetings and activities, out of which emerges key themes. After negotiating goals to support the themes, we then synthesize all of the information into a written strategic plan. This is where a lot of folks stop: at the plan. We take it a step further and equip the staff with work planning tools to create their own metrics, scheduling, and tracking of the plans. In a sense, we help them to put the plan into work boots so that strategic priorities are present and accounted for each day.