

Practical Questions Your Board and Team Might Ask About Strategic Planning

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In our work with nonprofits on strategic planning, we consistently hear five questions about the process from nonprofit boards and nonprofit leadership teams. Here we share those frequently asked questions and provide answers to help you better explore your organization's readiness and preparedness to start a strategic planning process.

1. When is the right time for strategic planning?

Strategic planning offers the most value when an organization finds itself engaging in important discussions about how it will achieve impact. These discussions often emerge in a few contexts:

- **There is a change in the environment.** If big things are happening in the world around you (e.g., regulatory environment, community where you work, funding landscape), you'll want to think hard about how your organization will meet these new challenges or opportunities.
- **There is a change in your organization.** New leadership, major turnover in staff, or much faster growth are all indicators that it may be time to get clearer as an organization on the goals and initiatives you should focus on.
- **You're not sure which opportunities to say "Yes" or "No" to.** This may be a sign that your organization is doing too many different things or lacks a sense of direction and can benefit from clarifying which initiatives are core to your organization's impact.

Strategic planning doesn't need to occur on a rigid schedule, but if it's been more than a few years since you've looked at the fundamentals of your strategy, it may be time for at least a strategic refresh—which can be quicker than the typical full-scale planning process (see the next question below).

2. How much time and effort should our organization invest in strategic planning?

It can take three to six months to conduct an effective strategic planning process—and sometimes longer if the organization is complex or faces particularly knotty issues. It often comes down to the degree of change you are considering. If you are exploring or experiencing significant shifts, it makes sense to invest more time in planning.

Updating your strategy—a strategic refresh rather than a full-scale planning process—can be done more quickly. A refresh is an opportunity to touch base with your board, leadership team, staff, and key constituents to realign on your organization's purpose and how your organization will pursue it. It might also focus more heavily on a particular element or subset of your existing plan.

But while a fast process can seem appealing, too much speed may reduce the opportunity to seriously engage staff, board, partners, and constituents—to listen, learn, and align the

whole organization on the way forward. Keep that in mind as you consider how you invest in any form of strategic planning.

3. Who should our organization involve in the strategic planning process?

Strategic planning offers a valuable opportunity to learn from and engage individuals beyond your core leadership team and board. Participation in the process varies from organization to organization, depending on its culture. In our experience, a successful process draws on a variety of ideas and involves stakeholders—staff, board, funders, partners, or constituents—in meaningful ways. These groups might have formal decision making and advisory roles in the process, or they may provide more informal feedback and information.

Engaging a range of stakeholders is useful for a variety of reasons. It can help you get to better answers by incorporating fresh, diverse perspectives and ideas. It can also increase buy-in and shared ownership of any changes your strategic plan calls for. And it can contribute to better and more equitable answers by involving those closest to your organization's work.

In engaging a set of stakeholders, it's important to consider:

- **Who and why?** Who are the key stakeholders who need to be engaged? What are the main objectives of each individual or group? Which ones might have formal decision-making roles or critical roles in executing the plan?
- **How?** How will feedback be gathered, synthesized, and incorporated? Who will lead the engagement?
- **When?** When will communication take place and how will it be sequenced? For those who are less formally involved, how will you share back how the information was used?

4. How can our strategy and planning process advance equity?

Many nonprofits have established organizational goals related to equity and inclusion. Stepping back at the outset of a strategic planning process to reflect on the ambition of—and progress toward—those goals can help ensure you zero in on important opportunities or remaining challenges to tackle during the process. And for those who haven't yet established equity-related goals, the process can be an opportunity to consider whether the organization can do more to advance equity in the organization and through its work.

Every strategic planning process also includes multiple choice points—decisions that either reinforce the status quo or open opportunities for racial equity, inclusion, and belonging, as [Race Forward](#) defines them. Choice points also apply to other dimensions of equity, such as gender or sexual orientation.

In our experience, some key choice points in a strategic planning process include:

- **Engaging stakeholders.** Building a strategy that addresses the biases and structural barriers of our world requires bringing a diverse set of voices and perspectives to the table in the strategic planning process.

Prompts for discussion. Do the stakeholders playing a role in the planning process reflect the dimensions of diversity critical to our work? Are we including the perspectives of those closest to the problem or challenge we seek to address?

- **Clarifying strategy and setting strategic priorities.** Your understanding of the structural inequities and biases that affect your constituents and work should inform how your organization thinks about its goals for impact, approach (theory of change), and strategy.

Prompts for discussion. Are different communities or populations disproportionately impacted by the problem or challenge we seek to address? Do we understand the root causes and related histories driving these disparities? How do we—or how could we—address the disparities that affect the communities or populations we care about?

- **Estimating resources.** Advancing equity within your organization and through your work requires a meaningful investment of resources—time, money, and people—that are matched to the ambition of your goals.

Prompts for discussion. Are we allocating sufficient resources to pursue any goals we have established related to equity and inclusion? Do our leadership team and staff reflect the dimensions of diversity and experience required to advance this work?

- **Planning to implement.** Measuring and managing progress against your strategic plan will help hold you and your team accountable for the goals you've established.

Prompts for discussion. Are we collecting, disaggregating, and analyzing data that will allow us to track progress against and hold ourselves accountable to our equity-related goals?

5. What kind of outside support might we need to develop our strategic plan?

You cannot outsource the kind of thinking and decision making needed to do strategic planning well. It is likely to take a significant amount of senior leaders' time over the course of the planning process, and a staff member will need to serve as the point person for planning activities. But many nonprofits do find that getting outside help can be valuable. There are a variety of options:

- **Facilitation support.** A facilitator doesn't manage the process but can serve as a neutral party to facilitate decision making and elicit candid input from participants.
- **Analytical support.** A consultant can help an organization conduct research around specific topics, such as estimating the size of a target population, or bring subject-matter expertise that may be lacking within the organization's own team.
- **Writing and communications support.** A strategic plan is an important way to communicate to external stakeholders about where an organization is going and how it will get there—so getting a writing and communications professional involved may be helpful.
- **A consulting firm.** A single consultancy can play many of these roles and manage the overall process for you. It frees up staff time and potentially brings in important expertise. But it is likely to be more expensive. (The Bridgespan Group is one such consultancy.)

Regardless of what kind of outside help you might be looking for, it's helpful to ask a few nonprofit peers about whom they've used for outside support and what their experiences have been. You want to look for the best fit with your organization and its planning goals—there is no one-size-fits-all approach.

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