Nonprofit Resilience Network
SOUTHCOAST COMMUNITY FOUNDATION

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Designing the Process

STRATEGIC PLANNING FOR NONPROFITS:
FROM READINESS TO ACTION – SESSION 2

We help leaders make better decisions. | FIOPARTNERS.COM

WELCOME!

SouthCoast Community Foundation



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Introduce yourself in the chat!
Name, Org, Location

WELCOME!

Fio Partners, LLC

We help leaders make better decisions.

We work exclusively with:

- Nonprofits
- Foundations
- Collaboratives
- Government Agencies
- And their Boards

Our services include:

- Strategic Planning
- Strategic Alliances
- Leadership Advisory
- Executive Search
- Succession Planning
- Training (Staff & Board)

Our journey across four sessions

1

Choose

Choosing the Right Planning Approach

10.15.2026

2

Design

Designing an Inclusive & Right-Sized Process

11.12.2026

3

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Listening, Learning, and Engagement

12.03.2026

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Moving from Insights to Priorities to Action

01.07.2027



Session 1 Recap

- Start with purpose: What do you need the plan to do?
- Get clear about your context and motivation, then match the type and scope of planning to it.
- Learn from your last plan before starting the next one.
- Right-sized means thoughtful and sufficient—
  More isn't always best. Define better!

Session 2 moves us into **designing the process**

Session 1 Resource: Preparing to Plan Self-Assessment

INVOLVEMENT	LEARNING	FOLLOW-THROUGH	TIME, MONEY, & LOGISTICS
Who participates and how? Who guides the process? (*Today!*)	How much information gathering is needed? (*Session 3*)	How will the plan connect to reporting and decision-making? (*Session 4*)	What's a realistic timeline and budget? Coordination and facilitation support? (*Throughout*)

Your Readiness Snapshot points directly to process design choices.



Session 2 Learning Objectives

Today, will help you:

1. Consider the major phases and decisions in a planning process.
2. Select the level of participation that fits the organization's purpose, relationships, and capacity.
3. Establish clear roles for staff, board members, the planning committee, stakeholders, and facilitators.
4. Sketch a realistic process design.

After the session, you'll receive a Process Design Worksheet to sketch a process your organization can carry out.

The Planning Arc



Goal: Shared learning, meaningful engagement, and clear decision-making

- Every process includes the same core work, even when the scale changes.
- Scope and timeline are driven by the size of the information base and the amount of involvement.
- Choices made in the design phase shape the quality of every phase that follows.

Strategic plans are change agendas.





Who do you need to involve?

> **"Change happens at the speed of trust."**
>
> —Stephen Covey

- Whose experiences and perspectives should inform your organization's discussions and decisions?
- Who needs to buy into the change and support its implementation?
- How can you engage these groups throughout the strategic planning process?



What did involvement look like in your last planning process?

1. There wasn't much. The Board and CEO/ED led the process without much input.
2. We involved key members of the staff.
3. We also listened to the people we serve and key stakeholders.
4. N/A – This is my first planning process



Who do you need to involve?

- Stakeholder groups to consider include:
  - Those you serve
  - Staff (all levels)
  - Board members
  - Volunteers
  - Collaborators
  - Community leaders
  - Funders & donors
  - Field leaders
- ***How do you currently engage these groups?***

Explore vantage points



Different roles notice different things. Good design brings those views together. What can each vantage point help you understand?

Board

Mission, stewardship, risk, long-term direction

Staff

Operations, culture, feasibility, client experience

People Served

Needs, barriers, program quality, lived experience

Partners + Funders

Community context, relationships, trends

Identify the right level of participation

Match the level(s) of participation to the influence you can genuinely offer each stakeholder group.

INFORM

People understand what is happening and why.

Sharing the planning process, findings, and decisions.

"This is what is happening and why."

CONSULT

People provide insights that inform the work.

Listening through surveys, focus groups, or interviews.

"This is what we're curious about. What's your perspective?"

INVOLVE

People actively help shape ideas and choices.

Engaging people in interpreting findings and exploring possibilities.

"This is what we're working on. Help us shape it."

CO-DESIGN

People share responsibility for developing the direction and key choices.

Working together to develop recommendations and priorities.

"This is what we need to figure out. Let's figure it out together."

Credit: Inspired by IAP2 Spectrum of Public Engagement



Consider expanding the participation model

History	Who has usually guided big decisions?
Influence	Which voices have most shaped the outcome?
Trust	Where is there enough trust to share influence?
Access	What would make participation practical and respectful (not extractive)?
Power	Which decisions can genuinely be shared?

Map out the right (and real) level of participation

Stakeholder Group	INFORM	CONSULT	INVOLVE	CO-DESIGN
Planning Committee	Orient to role	Informs the process	Reflects on findings	Drafts the plan
People we serve	Close the loop after planning is complete! (Participation without clarity can reduce trust.)	Needs and program satisfaction		
Staff		Workplace functioning	Program strategy	Senior staff on PC
Board			Shape strategy at retreat	Final input and approval
Volunteers		Satisfaction, observations, supports		
Community Partners		What are they seeing? How can we collaborate?		
Funders		Why do they value us? Their aspirations for us?		

- Don’t promise stakeholders more influence than you’re actually prepared to give them.
- People should know whether you're asking them to provide their perspective, help shape decisions, or decide.
- The same stakeholder can move across the spectrum during the process.

You can widen input without overcomplicating it

Committee

A few board members and the executive director can serve as the planning committee.

Existing moments

Gather input at program events, volunteer meetings, community events, or regular staff check-ins.

Short tools

Use one-question cards, input boxes/boards, or a brief survey.

Close the loop

Share what was heard, what changed, and what could not change.

The Planning Arc



Goal: Shared learning, meaningful engagement, and *clear decision-making*

- Who decides what?
- Clear decision rights make participation safer and more useful.
- Distinguish contribution from responsibility and from authority

Who decides what?

BOARD	Approves the final plan and major organizational shifts.
COMMITTEE + ED	Guide the process, synthesize learning, and recommend priorities.
STAFF + STAKEHOLDERS	Give input, contribute expertise, and test emerging ideas.
CONSULTANT / FACILITATOR	Designs and facilitates the process. Surfaces patterns. Does not decide.

How will decisions be made?

Fist to Five Model

I need an alternative. I can't support this right now.



I have real reservations about this.



I'm not sure. I need more discussion.



I'm not sure, but I'll trust the group's opinion.



I'm for the idea.



I strongly support the idea.





Would working with a consultant be helpful?

Things to consider:

- Who has the time?
  - Is there staff capacity to gather information, facilitate the process, and write the plan?
- Who holds the trust?
  - Benefit of staff engaging the people you serve
  - Benefit of a third party in eliciting honest responses
- Who holds the space?
  - Benefit of a staff-led process
  - Benefit of staff leaders being able to participate fully and weigh in instead of facilitating

Two fictional organizations we're following



Local Community Arts

- Small, 2 staff (ED + PT program coordinator)
- Relies on volunteers and working board, burnout
- Finances are stable but stretched thin
- Its last plan is 6 years old and had 22 initiatives that were never tracked.
- Strong values, regular listening
- *"How do we focus and build capacity?"*



Regional Human Services

- $15M multi-program, multi-site, ~80 staff
- Changing policy and funding environment
- New CEO looking to set vision and strategy
- Last plan was Board-driven, and the staff were mostly unaware of it
- Siloed, bureaucratic, infrequent listening
- *"How should we evolve over the next 5 years?"*

Local Community Arts: Design Dilemma



The ED wants to write the plan herself. The board chair wants to ask what volunteers, participants, and patrons think.

Process Guide

3 board members and ED serve as the planning committee

Learning & Participation

Use feedback data and gather input on future at existing events

Decision-Making

Board and ED have a retreat to choose 3–4 priorities… not 22

Follow-Through

One board member polishes the plan so it can be shared

Timeline

About 3 months.

Regional Human Services: Design Dilemma



The board is curious but wants speed to reassure funders. The new ED wants time to listen and earn trust.

Process Guide

Cross-functional committee, including frontline staff. Funder reads RFP, suggests consultants.

Learning & Participation

Consultant supports more robust information gathering and neutral listening

Decision-Making

Staff workgroups for workplace and program recommendations, check-ins to test major choices.

Follow-Through

Campaign to share strategic priorities with internal and external stakeholders

Timeline

About 9 months.

Speed of Trust

Participation and feedback loops may be slower, but can prevent delays, resistance, and rework later.



Tool:
Process Design Worksheet

1. Purpose
2. Who participates & how?
3. Who guides?
4. Who decides?
5. Phases + timeline
6. Outside support?

Complete it on your own, then compare answers with your board chair and senior staff.

Where you differ is often where the most useful conversation begins.

Request for Proposals (RFP) or for Qualifications (RFQ)?

RFP

- A detailed project description that asks consultants to propose an approach, workplan, team, and cost.
- **Best when the organization knows the scope and wants comparable proposals.**

RFQ

- A request to learn about qualifications and select based on fit, then shape the approach together.
- **Best when the need is clear but the right method should be co-designed.**

Either way, share the purpose, context, decision process, timing, and budget.

Give enough information for a thoughtful response—but leave room for recommendations.



Key Takeaways

Design for a process you can honor

- Purpose drives design. Start with what the plan needs to accomplish
- Match involvement to trust and capacity. More is not automatically inclusive.
- Name decision rights early. People need to know how their input will matter.
- Keep the full arc. Small processes should still design, learn, engage, and follow through (how plans avoid the shelf).

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Thank you!



Unmute & let's talk!

1. What's one way you've gathered input from staff, board members or the people you serve, and how did it go?
2. How have decisions actually gotten made in your past planning, and what would you keep or change?
3. What feels hardest about designing your next planning process, and what do you want to ask the group?