# Putting the Strategy Back in Strategic Planning

August 14, 2026

## Learning Objective

Participants will strengthen their leadership team's capacity to effectively assess, refine, and monitor their strategy for the greatest potential impact in an increasingly dynamic world.

## Session Overview

Today's nonprofit leaders are experiencing unparalleled change and uncertainty, with the promise of even more to come. You demand actionable tools and approaches to developing and implementing strategy. You also want practical techniques to motivate your teams to welcome – and perhaps thrive on – change.

The following content is based on La Piana Consulting's powerful *Real-Time Strategic Planning* methodology — described in our book The Nonprofit Strategy Revolution — as well as our extensive experience guiding nonprofit leaders to position their organizations for strategic, equitable, and sustainable impact.

## Workshop Agenda

| Time | Topic | Details |
|---|---|---|
| 9:00 | Welcome | Introductions, Overview and Objectives |
| 9:15 | Taking Stock: Assessment & Strategy Building Blocks | ▪ Assess your organization's strategy and operations across various dimensions (programs, finance, fundraising, facilities, etc.)<br>▪ Discuss principles of effective nonprofit strategy |
| 9:30 | Identity & Environmental Trends | |
| 9:55 | What's Your Superpower? | ▪ Consider trends and the strengths of other players in your field<br>▪ Identify (or confirm) your organization's unique strengths |
| 10:20 | Decision-Making Criteria | Draft (or update) the decision-making criteria your organization uses to develop, evaluate, and communicate your strategic choices |
| 10:35 | Break | Network / Recharge |
| 10:45 | Big Questions & Scenario Mapping | ▪ Determine what question is most critical to answer through the strategy development process<br>▪ Identify high-importance and high-risk scenario planning drivers |
| 11:05 | Supporting Teams Through Change | Discuss approaches to build a culture that effectively navigates change |
| 11:40 | Workshop Recap | Q&A |
| 12:00 | Adjourn for Lunch | |

## Pre-Read

Please review this document in advance of the workshop to familiarize yourself with the terms and concepts upon which we will build. Additional information and worksheets for the small group activities will be provided on-site.

## Strategy Development Overview

### Definitions

***Vision***: Describes the inspirational, long-term impact that is desired by the organization (*How will the world change for the better because of our contribution?*)

***Mission***: An organization's purpose and reason for being? (*What is the contribution we will make toward our desired impact?)*

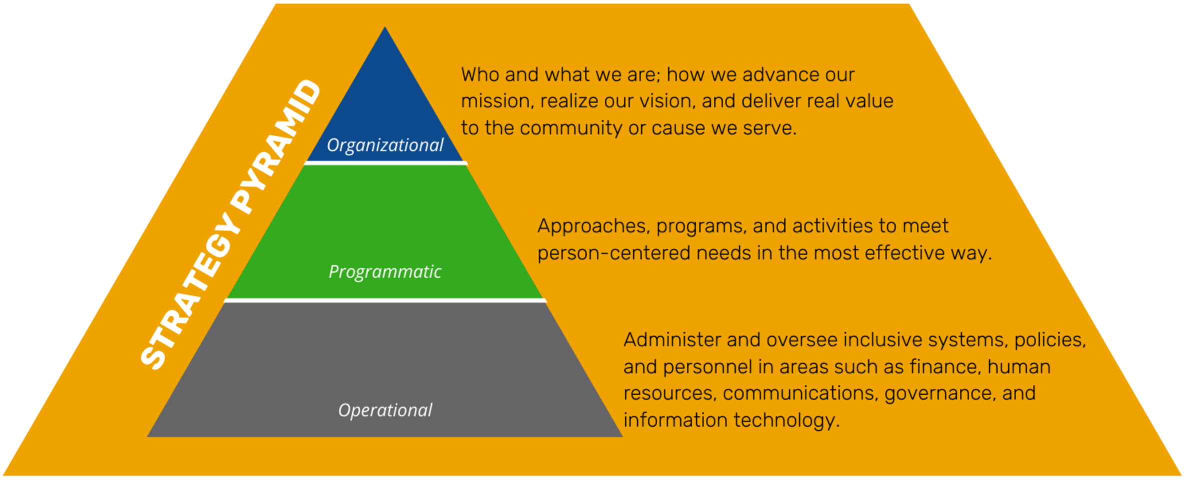
***Strategy:*** is how an organization will leverage its unique strengths to advance its mission (*How will we focus and align our efforts in the current environment to achieve our mission?)*

***Strategic Planning***: How an organization operationalizes its strategy (*What are the actions, milestones, and resources that will advance our strategy?)*

Put another way, **strategy** is a ***coordinated set of actions*** aimed at ***creating and sustaining a unique strength*** in ***carrying out the nonprofit's mission***.

### Strategy Pyramid

There are three levels of organizational functioning, each of which requires a different type of strategy: organizational, programmatic, and operational. The Strategy Pyramid below displays these levels — to be read from the top, beginning with organizational strategy. All three levels of strategy must align with your high-level strategic intent in a mutually reinforcing system. Organizational strategy typically is set by a nonprofit's board. Most boards then delegate to staff the development of programmatic and operational strategies.



## The Building Blocks of Strategy

This strategy development process was built around the following principle:

*The Right Questions + Relevant Information + Clear Decision Criteria =* ***Good Decisions***

In contrast to many strategic planning efforts, the most successful nonprofits first get to clarity on strategy (how they will leverage their strengths to advance their mission), and only then to begin developing specific plans for how to operationalize that strategy. The image at right visually represents elements of the process for strategy development process.


## Organizational Identity

***Effective strategy is a choice*** – rooted in a firm understanding of “who we are” and “who we are not” as an organization. Agreement on an organization’s ***current identity*** — including its purpose, desired impact, primary audiences, programs and services, and funding sources — sets a foundation on which to imagine a different future.

## The Market – Trends and Players

### Trends

Environmental factors likely to impact your organization as it moves forward include, but are not limited to: **Social Trends** like demand for your programs/services based on societal perceptions; **Economic Trends** like unemployment, inflation, income, etc.; **Demographic Trends** by age, gender, race, and ethnicity; **Available Funding** for our programs/services **from individual donations, corporate sponsorship, government, and other sources; and** Political or Policy Trends **at the local, regional, state, and/or national level.**

### Players

When engaging in strategy development, it is important to identify what strength makes your organization unique and what types of collaborations can bring strengths your organization does not possess. To do that, you need to identify and understand other players in the field, and their unique strengths.

Other players in the field may be partners and collaborators, they may also share similar programs, or serve the same population and geographic area. There may be some that meet the same need in a different way or pursue the same funding sources, board members, volunteers, staff and media coverage.

## Competitive Advantage

Your organization's "competitive advantage" is the ability to have an impact or advance your mission by using a **unique asset** that no similar organization in your field or geographic area has and/or **outstanding execution** such as being faster or less expensive, or having better service.

Competitive advantage is determined by identifying ***how your organization differs from its peers in how the mission is advanced or impact is made*** in a way that customers and funders value.

## The Strategy Screen

Leaders with clear decision-making criteria are well-equipped to make better decisions. The strategy screen allows the decision-making process to align strategic choices with an organization's mission, vision, and capabilities while avoiding hasty decisions made under pressure. It is also a valuable communication tool for fostering agreement on what information is needed to succeed, surfacing important issues, and clarifying the rationale for those decisions for stakeholders.

### How to use the Strategy Screen

When faced with a strategic choice, apply the strategy screen by considering how each option (including keeping the status quo) addresses each criterion.

The criteria help inform decision-making but should not be the sole method of determining the path forward. Update the list of criteria as needed to ensure its relevance.

## The Big Question

***A Big Question is an opportunity or threat to which the organization must respond.***

A Big Question is usually an opportunity or challenge that requires a response and is beyond the scope of the organization's current strategies and thus requires a new approach.

Big Questions typically arise from one of three sources, a **new opportunity** the organization perceives that can improve its ability to achieve its mission in a measurable way, a **competitive challenge** as a result of a decision made by an entity outside of your organization, or a **business model challenge** that impacts all organizations in your field from a policy shift, economic circumstances, etc.

# Change Management Overview

## The Role of Culture in Change Management

Organizational change is *a systemic response in reaction to, or anticipation of, a new set of internal and/or external factors*. To stay relevant and always ready to deliver on the mission, organizations need to be willing to handle the difficulty and uncertainty that come along with change. This will help ensure exciting opportunities and innovations do not pass by.

Any change effort begins with the recognition that the current state is undesirable and necessitates identifying a path forward. The ability of a team to understand, embrace, implement, and embed change has an outsized impact on the probability of success.

*This formula illustrates the relationship:*


## The Right Solution

Getting to the best solution involves a series of steps:


A deliberately inclusive process greatly enhances all the elements listed above.

## Good Execution

Requirements for outstanding execution of any new strategy include:


Closely linking decisions with organizational priorities and **connecting execution goals to individual performance expectations is critical**.

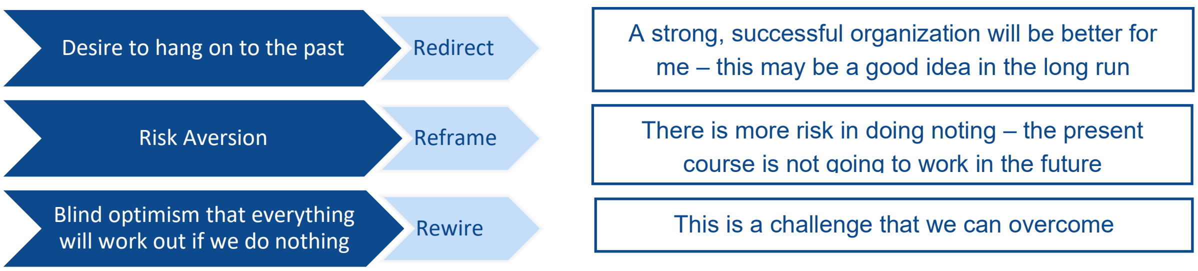
## Adaptive Culture

Centering an adaptive organizational culture where change is both a habit and a motivator leads to success in constantly shifting circumstances and can mitigate “change fatigue”. Types of Responses:

- **Technical Responses**: The solution can be provided by an authority figure, by an outside expert, or by implementing a new tool or process
- **Adaptive Responses**: Actions in which people must change the way they think about their roles and their approach to work

## Redirect / Reframe / Rewire

An adaptive culture surfaces, addresses, and redirects the common human tendencies of self-interest, risk aversion, and a biased toward optimism that often hinders change. A highly adapted culture will redirect, refrain, and rewire these tendencies toward progress.




## The 20-60-20 Rule

For any major opportunity or challenge, people tend to fall roughly into three categories:

- Twenty percent are **early adopters**. They already knew this change was needed.
- Sixty percent are **cautious accepters**. They will move forward if it feels safe and are convinced leadership is serious about it.
- Twenty percent may be **active resisters**. They are against the proposed change and will try to impede implementation efforts.

Leaders often spend most of their energy responding to the active resisters. While they can help reveal any fatal flaw in the emerging solution, **once you are ready to decide, shift your focus and energy to the early adopters**. Engage them in visible roles in the change process and recognize them within the organization. The cautious acceptors will be motivated to come along and, eventually, the active resistors will either get on board or leave the organization (voluntarily or otherwise).

## Engagement Is Critical in Change Efforts

Front-end input is not the same as engagement and power-sharing. **The core of deep engagement is inclusion, which motivates people to co-create the solution.** When people feel excluded, they may ignore the situation or criticize proposed solutions offered by others.

- Share information to help your team recognize there is a problem that needs attention
- Engage with the team authentically
- Give careful thought to *how* diverse perspectives are included in the process
- Err on the side of overcommunicating
- Manage change at all levels of the organization (board, management, front-line staff, association members, volunteers, current or past program participants, and other stakeholders)

## Change and Transition Models

### Lewin: Unfreeze, Change, Refreeze

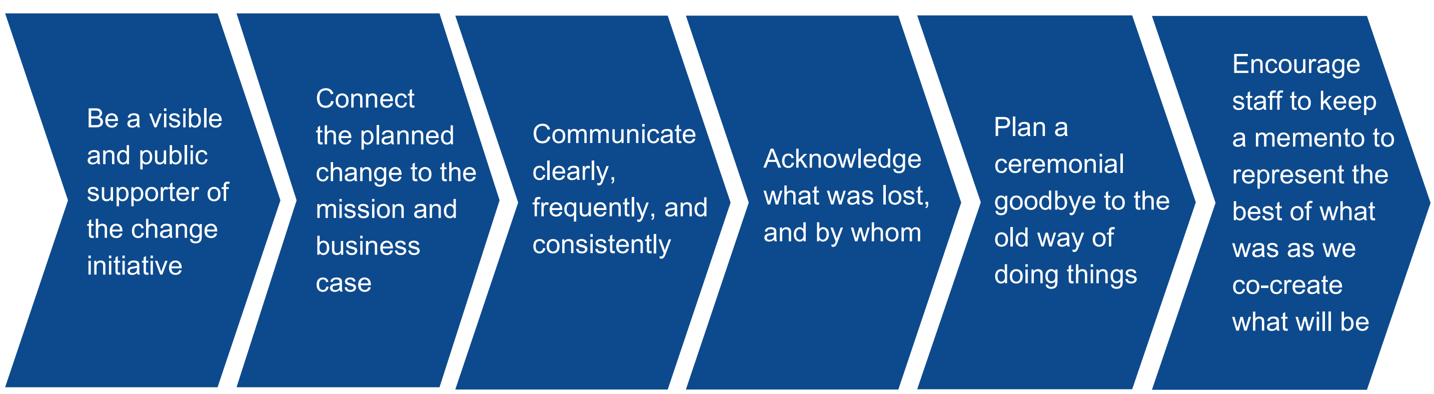
Kurt Lewin's research led to a model that first focuses on creating the motivation for change and 'unfreezing' the current state of the organization. Then, the team works together to initiate the change and build momentum by removing obstacles and celebrating wins. Finally, once the change is complete, it must be institutionalized to avoid instances of reverting to old ways of doing things.

### Bridges: Change versus Transition

It can be helpful to distinguish between *change* and *transition*. William Bridges defined change as an external event or situation that is generally in response to external events. **Transition is the inner psychological process of coming to terms with a new situation.** Those impacted by a change first experience a sense of loss in the *Endings* phase. Partway through a change process, they may find themselves in a *Neutral Zone* full of confusion, resentment, and discomfort, but too late to revert to the past. As new clarity and attitudes set it, people experience *New Beginnings* and gain energy and motivation around the completed change. Without proper planning and support, significant change can put people in a crisis state of mind. Thus, change leaders must support people through transition rather than pushing forward stubbornly.

## Strategies for Leading Change

John Kotter suggests six strategies to lead teams through change and minimize the discomfort of the transition Neutral Zone.




## The Manager's Role in Leading Through Change

Often, managers are caught in the middle of change efforts. They may not have been the decision makers but are seen as the face of the change by their staff. However, they are critical to effective change management. Change leaders should engage managers early and often and establish a two-way communication that allows managers to feed questions and realities to the project team and provide important project updates and context to their own teams.

## Pre-Work: Organizational Self-Assessment

Whether in times of change or in the regular course of operations, an organizational assessment can help determine where best to focus your efforts. The following scorecard is a tool to prioritize investment of attention and resources. Using the prompts that follow the scorecard as a reflection tool, select and circle which color best represents the status of each assessment category.

| Category | Assessment |
|---|---|
| Strategic Framework / Plan | 🔴 🟡 🟢 |
| Governance | 🔴 🟡 🟢 |
| Programming and Activities | 🔴 🟡 🟢 |
| Finances | 🔴 🟡 🟢 |
| Fundraising | 🔴 🟡 🟢 |
| People & Partnerships | 🔴 🟡 🟢 |
| Marketing / Communications | 🔴 🟡 🟢 |
| Facilities / Technology | 🔴 🟡 🟢 |
| Legal | 🔴 🟡 🟢 |
| Other (Consider leadership, accessibility, sustainability, etc.) | 🔴 🟡 🟢 |

- 🔴 Area of high concern
- 🟡 Needs work but is manageable
- 🟢 We're good!

# Organizational Self-Assessment Prompts

## Strategic Framework / Plan

- Have staff recently reviewed the strategic plan?
- What is still true and relevant?
- What would it take to refresh your plan as a roadmap for the next 12-24 months?
- Is this an opportunity to address diversity, equity, and inclusion (DEI)?
- Do you actively refer to your strategic plan when new opportunities or challenges arise?
- Have you shifted your strategy to continue to meet your mission?
- Are you clear on what makes your organization unique?
- Is it the same unique strength or is there a new strength/superpower you've discovered?

## Governance

- Does the board have the appropriate skills and experience to fulfill its responsibilities?
- Is the strategic plan aligned with the board's clear vision of what we want our organization to be known for now and in the future?
- Has the board identified key indicators for tracking progress toward the organization's strategic goals?
- Does the board approve major changes in programs?
- Has the board recently reviewed the strategic plan?
- Are you optimizing your Board and Committee structure?
- Is there an opportunity to create a more inclusive Board and Committee structures?

## Programming and Activities

- Have you conducted trend and player analysis?
- What are your highest-impact programs? How do you know?
- Have you considered reinventing your programs to meet critical needs?
- What resources are needed? (E.g., systems, training, infrastructure)
- Do you need to educate stakeholders on changes?
- Can you keep clients, staff, volunteers safe?
- Are there adjustments to make to uphold our commitment DEI?
- Have you laid out scenarios and back-up plans?

## Finances

- Have you reviewed your year-to-date finances?
- What do they show?
- What is your cash position?
- What is your monthly burn rate?
- What indications have you been hearing from donors/funders?
- Can you adjust the terms of restricted grants?
- Have you stress-tested your budget? (E.g., reductions of 10%, 25%, or 40%)
- Are you effectively engaging your Finance Committee?

## Fundraising

- Are you clear on your funding mix and areas of fundraising strength?
- How are you engaging your strongest donors and partners?
- What is your current messaging/outreach?
- What feedback are you getting?
- Does your fundraising approach need to change?
- What resources are needed?
- Is there a way to better incorporate DEI in your approach?

## People

- Has there been leadership turnover?
- Have you had to make staffing changes?
- If furloughs/lay-offs – are there creative and equitable solutions? Are you considering options through a lens guided by your values?
- Have leaders been modeling self-care approaches for staff?
- Are there opportunities to maintain flexibility?
- Have you reviewed personnel policies?
- Are you able to provide training or infrastructure to keep staff, clients, and volunteers safe?
- Who are your key partners? How have your relationships been strengthened or weakened?
- Are there opportunities to work together to address gaps?
- How does your organization work best in partnership?
- What new partnerships might bring mutual benefit?
- How might you reach out to those organizations to problem-solve?

## Marketing / Communications

- Have you reviewed your communications plan?
- Is there an opportunity to adapt?
- Are you being transparent about the impact of current events on your organization?
- Do you segment how you reach audiences?
- Are current channels working?
- Does your messaging reflect inclusion and dignity for all?
- Are you linking communications to fundraising efforts?
- Do you need additional resources to implement changes?

## Facilities / Technology

- Have you had to make changes in your facilities or in your technology?
- What additional changes may be needed under different scenarios?
- What are the costs (out-of-pocket or lost revenue) to implement?
- What contingency plans do you have for last-minute changes?
- Are there soft skills to be acquired as well?

## Legal

- Are you in compliance in all matters?
- Have you your contracts, policies, by-laws, and manuals been reviewed by counsel in the last year?
- Have any new federal, state, or local polices changed that impact or threaten your organization or people?

## Other

- What's an area that was not covered?
- What are the key drivers in that area?
- What are the risks related with each driver?
- How would you assess your organization's ability to address any shortcomings?
- What are the costs involved?
- What are the timing implications?
- How does it impact other areas?