

TAKING CHARGE *of Your* STRATEGIC PLAN

TIPS *for*
Small- to Mid-Size Organizations

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FOREWORD

The task of developing strategy for an organization is an essential act of leadership. At a volatile time in U.S. history when social justice organizations and movements confront an often-dizzying mix of challenges and demands, it's critical to have a clear set of strategic priorities to help guide decision making and collective action.

At its essence, strategic planning involves making choices about where and how the organization is best positioned to have an impact, aligning the work of the organization with its values and mission, and ensuring the organization has the resources to address its priorities. Leaders need to be able to inspire and engage others towards a resonant vision and strategic direction.

It's not surprising that strategic planning is one of the leadership development activities that many organizations prioritize with support from their Flexible Leadership Award (FLA) grants. In the following pages, the FLA plan consultants and staff share tips and insights from their decades of experience partnering with social justice leaders in the design, planning, and facilitation of strategic plans. We are grateful to them for their generosity of spirit, and hope that this serves as a useful resource to those who are embarking on a planning process.

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INTRODUCTION

Social justice leaders intuitively understand the importance of strategic planning and strategic thinking. With sound strategies in place, organizations and movements are better positioned to ensure that their decisions and actions are aligned with their broader goals for social change.

But planning can be time-consuming, intimidating, and worse. Indeed, many nonprofit leaders have had difficult experiences with strategic planning and are reluctant to jump in again. The following comments are frequently shared:

- “We don’t want a plan that’s just going to sit on the shelf gathering dust.”
- “There were not a lot of true strategy conversations in our strategic planning.”
- “Strategic planning often fails to place core constituencies at the center and be culturally sensitive.”
- “Strategic planning sucks up a lot of time and energy.”
- “Today’s environment is changing too rapidly for strategic plans to be useful.”

Another challenge is that it’s easy to get confused by all the different expert opinions about planning. Some experts, in fact, argue *against* formal planning and say that organizations instead should develop strategies that can be adapted to changing conditions.¹ Others acknowledge that strategic planning is often beset by faulty assumptions and ineffective practices. But when it’s done right, many say that planning can make the difference between success and failure for organizations.²

The authors of this publication believe that social justice leaders and their movements will be better off to the extent that they break out of this dualistic thinking. We’ve seen how effective planning can make a huge difference. And we believe the practice of strategic planning is evolving and changing for the better. The best path forward is to learn from multiple perspectives on strategic planning and then to design an approach that fits your organization’s needs and goals.

Today, social change leaders and the consultants who support them increasingly are experimenting with different approaches to strategic planning³ to meet the changing needs of organizations, alliances, and social movements. There are many valuable ways in which the field of strategic planning is evolving, including:

- More focus on directionality;
- More emphasis on strategy;
- More emphasis on real-time testing of ideas;
- More support for creativity and innovation;
- More attention to theories of change;
- More understanding of the need for change management and alignment of staff and board; and
- More attention to what is different about strategic planning for alliances, networks, and social movements.

1 See, for example, Dana O'Donovan and Noah Rimland Flower "[The Strategic Plan is Dead. Long Live Strategy.](#)" Stanford Social Innovation Review, January 2013

2 See, for example, "[Strategy Needs a Plan](#)" by Michael Allison, Stanford Social Innovation Review, May 2015

3 Some colleagues are increasingly using the language of "strategic thinking" or "strategic direction setting" because they want to distinguish between strategy and planning. Henry Mintzberg said in *The Rise and Fall of Strategic Planning*: "Strategic planning is an oxymoron. Strategic thinking does not lead to a plan, it leads to a strategy. Rather, planning must follow strategy. If you don't want to call it operational planning, call it 'Planning that Follows Strategy.'" Others use the language of "strategic alignment." For some, these distinctions and the precision of language are fundamental. For others, the exact terminologies and phrasing are less important. For the purposes of this paper, we will use the term "strategic planning" to include many approaches to strategic planning, strategic thinking, and building strategic alignment.

About This Guide

This resource is the result of many conversations among plan consultants, staff and grantees of the Flexible Leadership Awards (FLA) program. Toward the end of each engagement, plan consultants and staff dedicate time to learn together with FLA grantees about what worked and what did not. In addition, FLA plan consultants initiated a volunteer learning group in 2015 to tap grantee observations on practices of strategic planning. This learning group grew into a small project of developing guidance that could be valuable to FLA grantee leaders—and potentially other nonprofit leaders—when considering a strategic planning process.

Based on these discussions, we produced this guide to support organizations and alliances in designing the strategic planning process that is right for them. Given the relatively high cost of many strategic planning efforts in money, time and effort, this document was conceived to assist organizations and their leaders in getting maximum value from the work. This document is not an encyclopedic review of the strategic planning literature and methodologies. Rather, its purpose is simply to help you make sense of the value that is possible through a strategic planning process, to help you be clear about what you seek to accomplish, and to help you make informed choices about what the best approach will be for your organization or alliance.

Additionally, in sharing our guidance, we aim to demonstrate how leaders can hold and leverage a racial equity and intersectional lens as organizational visions are articulated, strategic directions formulated, new partnerships imagined, and strategies to strengthen organizations crafted. By an ‘intersectional’ lens, we mean a way of examining the work that recognizes the centrality of race while acknowledging the multiple and simultaneous identities that we hold, including gender, sexual orientation, immigration status, ability, class, and ethnicity.

2 Why Do a Strategic Plan?

When it's done well, strategic planning can help ensure that social justice organizations are able to:

- Achieve the goals and impacts outlined in your mission
- Do so in a way that is consistent with your organization's values
- Establish a way of working that is sustainable and effective
- Advance mission while advancing racial equity

The Essential Elements of a Strategic Organization

A strategically-led organization encompasses a set of core elements. An effective strategic planning process will pay some attention to each of these elements. How much time your organization dedicates to each element during strategic planning, what approaches and methodologies you use, and which elements, if any, are supported by outside consultants will vary—and are wholly dependent upon the needs, circumstances, and interests of your organization.

STORIES OF BREAKTHROUGHS IN STRATEGIC PLANNING & STRATEGIC THINKING:

The Black Alliance for Just Immigration (BAJI)

The Black Alliance for Just Immigration (BAJI) has grown rapidly to become a national organization with a strong presence in both the immigrant rights movement and the Black liberation movement. During the course of its most recent strategic planning effort, BAJI carried out an executive transition from its founder to a new leader. The strategic planning process began with developing a new focus and strategic priorities for the organization, but it also became a helpful way for managing the leadership transition. With the completed strategic plan as a springboard, BAJI convened a retreat with its board to help build their fundraising capacity. Within a year, the organization achieved significant progress on its strategic priorities while also holding its first major fundraiser, an event that exceeded its goals and netted over \$200,000. While the planning process focused on BAJI's strategy and plans, it also helped the organization fully step into its envisioned future with new staff leadership and a newly energized board.



<i>Elements of a Strategic Organization</i>	<i>How to Build them into Your Planning Process</i>
Strategy	Clarify what your organization seeks to accomplish and how (broadly speaking) it will achieve success. Make choices about where the organization is best positioned to have an impact.
Planning	Create plans to operationalize the strategy.
Values	Articulate your values and examine how your organization and its people will live those values through the work.
Racial Equity with an Intersectional Lens	Assess your organization's readiness to address racial equity, intersectionality, power, and privilege both inside the organization and externally. Take a deep look at the organization's culture, behaviors, internal systems and policies, collaborations, partnerships, and networks and assess how well they reflect, promote and support the principles of racial equity and intersectionality.
Leadership Development	Use the strategic planning process as a vehicle for leadership development of staff, board, grassroots leaders, and partner organizations.
Organizational Assessment	Gather quantitative and qualitative data about: 1) the internal state of the organization (including the organization's culture, unique strengths, challenges, and impacts); and 2) the external context (including key funding and policy trends, other organizations with overlapping or complementary missions, and the organization's position within movements, networks, and partnerships).
Stakeholder Input and Transparency	Gather input from a cross-section of stakeholders who can offer insight and constructive criticism. This includes partners, other groups in the movement, members, staff, board and supporters, etc., including those who would be most affected by the resulting strategy. Plan to share the results of the strategic planning process with everyone in the organization and the community.
Compelling Story	Include a coherent and compelling narrative about how you will use the strategic plan to create a powerful, sustainable, and effective organization. This will particularly serve leaders who join the organization after the strategic planning process.
Financial Sustainability	Review and test the strength of your organization's current revenue model given the changing context, and recommend actions accordingly.
Resource Plan	Develop a resource plan for strategic plan implementation, including a set of specific and informed ideas about how to acquire the monetary and non-monetary resources needed to be successful with the plan.
Alignment	Build alignment between mission and values; priorities and goals; strategies, and resources through the process; and establish practices for maintaining alignment.
Decisiveness	Make tough choices about what the organization will and will not do.
Learning Through Doing, Adaptive Leadership	Develop a system and ongoing practice of experimentation, learning, monitoring of changing conditions, and adaptation of strategy and plans as needed.

Planning as a Balancing Act

There are several common tensions in leading social change organizations. An important goal of strategic planning and strategic thinking is to try and balance these tensions in a way that enables your organization to thrive. The following is a working list of questions that touch on the tensions and challenges embedded in the work of most social change organizations. To some degree, different approaches to strategic planning and strategic thinking offer different ways to address these questions.

- How do we balance the need for direction and strategy and the need to remain nimble and adaptive?
- How do we determine the right approach to (and amount of) research, stakeholder engagement, and team learning in the context of limited time and resources?
- How do we build in transparent processes and appropriate levels of participation around decision-making? How do we avoid “fake” engagement?
- How do some aspects of strategic thinking and planning replicate unproductive dynamics of race, power, and privilege? What are the best practices to root strategic thinking and strategic planning in racial equity with an intersectional lens?
- What are effective strategic planning processes for team-based organizations and looser networks that do not operate like a traditional organization?
- Given constraints on time and resources, how do we use our time most efficiently (staff and board) to address the elements of strategic planning needed for our organization?



In the end, the key to successful strategic planning is designing a process that engages all of the organization’s key stakeholders in a respectful, energizing manner, and that builds enthusiasm and hopefulness for the road ahead. Leaders and teams should stay open to the possibility that new insights might lead to transformative change during the strategic planning process. As Jude Kaye, a nationally respected strategic planning consultant and author, would oft repeat, “Remember, the past has a vote but not a veto!”

STORIES OF BREAKTHROUGHS IN STRATEGIC PLANNING & STRATEGIC THINKING:

National LGBTQ Task Force

As part of its strategic planning process, the **National LGBTQ Task Force** collaborated with the Institute of the Future to sit down in discussion with leaders from Facebook and other technology companies. The focus of the conversation was how the future is already playing out in Silicon Valley. Leaders at the Task Force say the encounter was transformative, and now technology strategy is a major priority for the organization.



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Assessing Your Organization's Needs and Goals

If your organization or alliance is interested in entering a deeper strategic planning process, a first step is engaging in reflection. Among the key points to consider are: 1) the state of the organization in this moment; and 2) the questions you need to answer in a strategic planning process.

Many organizations find it valuable to form a strategic planning team (often a mix of board, staff, and grassroots leaders). Members of this team participate in the assessment and consultant interview process and play an advisory role throughout the strategic planning process.

Eight Questions to Ask Before Starting a Strategic Planning Process

Below are eight overarching questions that are important in the assessment phase that will help you design a tailored strategic planning process. We have included a set of more detailed questions for your reference in Appendix A.



1. What is propelling your interest in strategic planning? What are the important questions that your organization is trying to answer or the strategic issues you are trying to address? Why is this the right time to plan?
2. How healthy is your organization overall in this moment? What does a review of your “organizational vital statistics” (mission, programs, campaigns, governance, partnerships, finances, etc.) tell you about what needs attention? (See Appendix B for more details.)
3. What is the strength of your organization’s leadership and the quality of the relationships among different levels of leadership? (Planning can bring people into alignment, but it cannot be expected to bridge significant rifts.)
4. What is your analysis of culture, values, race, power, privilege, and other identities within your organization, and how should that inform the design of your planning process?

5. What are your preferences in the design of the strategic planning or strategic thinking process? Whose engagement and input do you need to ensure that you develop a well-informed, well-supported plan? Over what timeframe could/should the planning happen?
6. How much data on your strategic questions can you generate internally, and how much new data collection is likely needed?
7. What are the tools or products you would like at the end of the strategic planning process?
8. Based on your preliminary assessment, what's the best planning approach for your organization or alliance at this time? Is it a comprehensive planning process or more streamlined process? Or should you consider putting any planning process on hold to address more pressing matters?

With answers to these critical questions in hand, your organization is ready to move to the next phase: deciding on a planning approach.

STORIES OF BREAKTHROUGHS IN STRATEGIC PLANNING & STRATEGIC THINKING:

National Korean American Service and Education Consortium (NAKASEC)



The **National Korean American Service and Education Consortium (NAKASEC)** entered a strategic planning process in 2015. At the time, NAKASEC was undergoing an organizational transformation, moving from a focus on Korean American organizing to a broader strategy of organizing both Korean Americans and other Asian American communities. The strategic planning process was a space for staff, board, and grassroots leaders to try on this new identity and to build understanding and alignment. Given that this was NAKASEC's first formal strategic planning process, its leaders asked their consultant to conduct interviews with a wide range of staff, grassroots leaders, board members, ally organizations and funders. This was followed by a national retreat and planning in work groups. NAKASEC leaders ultimately decided that their best direction forward was to build the grassroots power of Asian Americans more broadly while staying connected to their Korean social movement roots.

Given that the organization had operated historically with a much greater focus on its external work vs. internal operations, NAKASEC leaders also used the strategic planning process to create plans for how to pursue their strategic direction. Their final product included a strategic framework (with direction, priorities, and keys to success); a narrative on the historic and current context for NAKASEC's emergent direction; highlights from the stakeholder interviews; an updated mission statement; guidance about how NAKASEC and the local affiliates would work together (in terms of operating values and roles); a fundraising plan; and potential benchmarks over a 10-year period. The plan also included a section called "Frequently Asked Questions and Answers," with language on how to talk about the transition within the organization and with external partners.

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Deciding on a Planning Approach

Once you have decided that this is the right time to engage in strategic planning for your organization or alliance, it can be helpful to get a “map of the territory” and better understand the different approaches to planning.

Two Broad Approaches to Strategic Planning

Generally speaking, it's wise to avoid dualistic thinking about what approaches of planning are right or wrong. A better strategy is to harvest the wisdom and lessons learned of different approaches. The reflections below are designed to give an overview of some approaches to strategic planning. While it is somewhat artificial to group approaches into two different buckets or schools of strategic planning, doing so provides fodder for discussion and consideration of the best approaches for your organization. Certainly, there can be overlap between the broad approaches, each of which has multiple variations.

A. The Three- to Five-Year Strategic Plan Approach

Summary: There are many books about strategic planning that support organizations in developing three- to five-year strategic plans. The core of this approach is that leaders develop a direction, goals, strategies, and a plan to operationalize those strategies within a specific timeframe.

Pros:

- When done well, these processes take into consideration the input of many stakeholders and the internal and external context of an organization, while building unity and skills.
- Mapping an organization-wide multi-year plan and linking it to annual operating plans can help leaders and staff understand their roles and how they will work as an integrated team to pursue the organization's strategic direction.
- This process often incorporates many planning best practices:

understanding the current state (internal and external), adopting creative methodologies, setting a strategic direction, identifying strategies, and preparing an organization to adapt its strategies.

Potential Downfalls:

- When not done well, this process does not give enough attention to fundamental questions of strategy by focusing too much on planning and execution.
- Plans can suggest a linear path for change and not take into account constantly changing conditions.
- Because there are so many potential elements to planning, this approach is more likely to be prolonged. Therefore, leaders and consultants have to be clear about what decisions relate to generative and strategic issues (and are best addressed during strategic planning), and what decisions concern tactical and operational issues (and are best made just before or during implementation of the plan).

CASE STUDY:

East Bay Asian Local Development Corporation (EBALDC)

A nonprofit community development organization based in Oakland, EBALDC used the **three- to five-year strategic planning approach** in developing its 2013-2016 strategic plan. The organization's planning process was deeply informed by a study published by the Alameda County Public Health Department, *Life and Death from Unnatural Causes*. The study documented the impacts of social and economic inequities on the health of individuals and entire communities—known as the “social determinants of health.” As part of a planning process, EBALDC organized a viewing and listening tour using the PBS documentary series “Unnatural Causes” to engage and build energy among stakeholders.



As a result of the process, EBALDC expanded its longstanding strategy of building and managing affordable housing and providing neighborhood development services to include a much more comprehensive understanding of what it takes for low- and moderate-income people to achieve well-being. In the process of shaping the plan, EBALDC recognized that it had to align with a broader set of partners and adopted a “collective impact” approach to working in a few priority neighborhoods. The focus:

engaging many other nonprofits, city agencies, neighborhood residents, and even small businesses as partners in neighborhood transformation.

EBALDC's story shows many of the qualities of effective strategic planning and implementation. The organization chose methodologies that would engage and energize stakeholders. It examined the data, thought out of the box, and allowed for new thinking to emerge. It is important to note that EBALDC did not experience this plan as a constraint; it regularly adapted to changing opportunities and circumstances and yet continued to be guided by the plan.

According to EBALDC's chief operating officer, Charise Fong, the strategic planning and implementation process was not neat and tidy. Rather, it was an ongoing cycle of practicing and learning. Recently, EBALDC launched a process to update its strategic plan with a firm commitment to continue using the core strategy developed in their last strategic planning process.

B. The Strategic Framework Approach

Summary: Some leaders are moving away from making detailed strategic plans to generating less detailed guiding frameworks in support of *strategic thinking*. For example, CompassPoint developed one-page theory-of-change frameworks to guide the work and decision-making of its client organizations. Norma Wong, cofounder of Forward Stance and strategic thinking consultant to FLA grantee Mobilize the Immigrant Vote, encourages leaders to focus on determining an organization's strategic direction and just two to three things that will leverage their position and organize their choices. La Piana Consulting draws a sharp distinction between strategy development and business planning, which they consider to be two related but distinct bodies of work for an organization.

Pros:

- Some leaders report that it is easier to think about strategy when it is separated from planning.
- These simple guiding frameworks can be faster to develop (though this is not always the case) and potentially easier to use as a guide and practical tool.
- This approach may help organizational leaders get on the same page about what should inform their choices. Leaders pursuing this approach also may find they can adapt more easily and be less mechanical in their pursuit of the organization's strategic direction.
- There is less emphasis on formulating detailed action plans in this approach, so the process can be less time-intensive for staff.

Potential Downfalls:

- Organizational leaders may be left with different understandings of how to pursue an organization's direction and strategies.
- The framework may not provide enough exploration or analysis about the context in which the organization is operating. This kind of understanding is key to helping leaders make clear choices about where they are best positioned to have impact.
- Organizations may fail to develop operational plans based on their strategic frameworks, or take a long time to do so, after the formal strategic thinking process is over.

CASE STUDY:***Mobilize the Immigrant Vote***

Mobilize the Immigrant Vote, which focuses its work in California, used the strategic framework approach in its strategic thinking process. The process kicked off with research on the current and projected demographics and voting profiles of the New American population in California and the U.S. (including immigrants and their family members). Next, the organization hosted facilitated strategic thinking sessions with staff, partner organizations and the board to assess and explore the mission, the substance of the work, and the ultimate impact it seeks to achieve. Leaders of the organization wanted a relatively swift process that would result in a guiding framework for the work, not a detailed plan.



Mobilize the Immigrant Vote developed a strategic framework with a succinct statement of the conclusions reached in the process. This framework included a fresh statement about the ultimate impact the organization seeks to achieve: to improve the living conditions of New Americans and all immigrants. In the course of the process, Mobilize the Immigrant Vote also affirmed its mission, which is to build the electoral power of New American communities in California as one strategy in a broader movement for social justice. The organization closed its more formal strategic thinking process in 2013 and began to live into the new strategy with a commitment to flexibility and nimbleness based on what the staff and board were learning and changing conditions.

Mobilize the Immigrant Vote's experience illustrates the evolution of strategy over time, sometimes referred to as emergent strategy. As the organization's environment changed (with increasing detention and deportation of immigrants and refugees, mass incarceration of people of color, the emergence of Black Lives Matter), Mobilize the Immigrant Vote made a commitment to build more bridges with the immigrant rights movement and the Black liberation movement. As well, taking into account

recommendations from MIV partners who work with refugee communities, MIV committed to intentionally lifting refugees as migrants whose experience is different from other immigrants. In addition to the core program work it had been doing, the organization decided to experiment with adding a “cultural strategy” dimension to its work. In 2015, it co-launched Until We Are Free, an arts- and-culture-based racial justice project with CultureStrike, an arts-based strategy hub, in partnership with Black Alliance for Just Immigration.

The mission of Mobilize the Immigrant Vote is still to build the electoral power of immigrants, refugees and young people of color, yet the organization has come to believe that cultural change is a precursor to systemic power and policy change. This shift has been a game-changer in energizing the staff and partner leaders for Mobilize the Immigrant Vote’s work. The story of the organization’s planning journey is an example of using a strategic framework as an anchor and allowing for emergent strategy. Mobilize the Immigrant Vote entered a new strategic thinking process in 2017.

Planning with a Racial Equity Lens

Today, most social justice organizations understand that they cannot achieve their missions without fully understanding how race intersects with their issues of concern. Integrating a racial equity lens into a strategic planning process can help organizations produce plans, goals and ways of working that are more effective, especially when that lens takes into consideration the multiple other identities people hold simultaneously, such as gender, sexual orientation, or class.

One core element of a plan that advances racial equity relates to the quality and depth of your organization’s relationship with the communities that have a stake in your mission, particularly the people for whom your work is meant to directly benefit.

To build trust with beneficiaries, organizations can cultivate cultural humility. When an organization routinely invites community input and engagement about program direction and strategy; when it regularly reports about its work and results to the community; when members from the impacted community are fully represented as staff, volunteers and board members – there is the possibility for authentic community connection to be established, mutual communication channels to be institutionalized and trust to be engendered. This foundation equips an organization to enter strategic planning with ready access to the perspectives and lived experiences of the people at the center of its mission.

A second aspect of planning with equity, is collecting and analyzing data that reveals how race impacts the experiences of people and communities your organization reaches. Disparities in outcomes are often created and maintained inadvertently by policies and practices that contain barriers to access and opportunities. You can use this data to inform internal and critical planning questions with an eye towards discerning

structural racial impacts by asking powerful questions, such as

- *Who is disproportionately affected?*
- *Who is not represented?*
- *Who benefits and who does not?*

This inquiry can lead to deeper analysis of root causes of problems, and provides for possibility of solution-making that produces greater equity.

Only strategies that are shaped by planning processes that specifically consider of race offer real potential to close racial equity gaps.

Planning with equity also includes establishing ways for people with different ways of knowing and showing up to participate as essential informants and decisionmakers, with particular attention to creating space for the voice, visibility and leadership of impacted communities and people of color. This may mean challenging prevailing organizational culture that prioritizes a sense of urgency, quantity over quality, documentation and writing skills, either/or thinking, the idea that progress means ‘bigger or more’, and conflict avoidance.

STORIES OF BREAKTHROUGHS IN STRATEGIC PLANNING & STRATEGIC THINKING:

Mujeres Unidas y Activas (MUA)

Over more than two decades of work, **Mujeres Unidas y Activas (MUA)** has regularly developed and implemented what could be called “standard” strategic plans. A grassroots organization focused on empowering immigrant women, MUA has expanded its scope and impact in recent years and is recognized as an effective advocate at the statewide level. Because of the organization’s growth and the changing demographics of its immigrant community base—especially as the daughters of immigrants joined the membership and staff—MUA was interested in looking at dynamics of race, class, and power that impacted its effectiveness. MUA supplemented its strategic plan with racial equity work focused on aligning its values and principles with its structures, policies and practices. This was an iterative process—an ongoing cycle of experimentation and learning for board, staff and members—intended to strengthen and deepen MUA’s leadership at every level. In addition, many MUA leaders were able to participate in the National Domestic Workers Alliance SOL (Strategy, Organizing, and Leadership) training. This provided a shared language and an approach to leadership and to working through trauma and differences in a healthy, open, and productive way.



MUA’s work is now undergirded by clear racial equity and inclusion principles and shared practices for hiring, supervision, internal communications, and organizational structure. The process has been transformative for members, staff and board. A report that tells MUA’s racial equity and leadership development story, called *Futuro Fuerte*, will soon be available.

One way to facilitate creating space for a different kind of thinking might be to try what Tema Okun and Kenneth Jones describe as “Seventh Generation Thinking” -- ask how the actions of the group now will affect people seven generations from now. Okun and Jones also suggest making sure “that any cost/benefit analysis includes all the costs, not just the financial ones, for example the cost in morale, the cost in credibility, the cost in the use of resources.” How can you build in mechanisms for the community to give feedback to the organization? How you will assess whether your plan is working by engaging in systematic inquiry that reflects the multiple ways people know, learn, and understand?

Other considerations include incorporating process goals into your planning that speak to **how** you want to do your work, not just what you want to do. This might include developing a culture of appreciation where everyone’s contributions to the work are acknowledged and celebrated. Your organization’s values and mission should guide how you approach your planning process. Invite community to name and refine operating values. Discuss them often once established, including how you expect them to show up in your messaging, your hiring, your decisions about where to locate your facilities and programs or with whom to partner.

Recognize that there are many ways to get to the same goals. Make room for different and new ideas. Be transparent and clear about how decisions will be made and by whom. Make certain everyone knows their level of responsibility and authority in the planning process. Make sure to get input from the people who will be responsible for particular benchmarks to ensure that they are realistic workplans and feasible timeframes.

In summary, as you design your strategic planning process, here some planning practices that promote racial equity.

<i>Practices that Promote Racial Equity</i>	
<i>Instead of...</i>	<i>Leaders can ...</i>
Seeing a small group of people as the experts and sources of wisdom	Craft processes that harvest the wisdom of multiple stakeholders and actively use that wisdom to inform strategy.
Seeing racial equity work as separate from strategic planning	See strategic planning as an opportunity to examine and live into the organization’s values of equity.
Allowing the power and authority of senior leaders to go unchallenged	Encourage team members to raise hard issues, and not require that those issues be raised in “acceptable” ways. Name where there are differences of power and privilege within the organization.
Speeding through packed meeting agendas	Design spacious meeting agendas that allow groups to take the time to be inclusive of all participants.
Valuing intellectual ideas above all else	Also value emotions, the body, and spirit as legitimate sources of wisdom.
Relying heavily on written material (memos, reports, PowerPoint presentations, English only, insider terms, etc.)	Use a multi-media approach that allows people to share, learn, and express themselves in more than one way (visuals, videos, storytelling, songs, interactive activities, culturally-relevant practices, mind-body practice, multiple languages, everyday language, etc.).

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Diving In. How to Choose Consultants... and More

Once you have conducted your pre-planning assessment and have a map of the territory in terms of approaches to strategic planning and strategic thinking, it is time to make some decisions. The following are key steps in shaping and launching your strategic planning process:

1. **Identify possible consultants/firms.** Members of the strategic planning group should discuss different approaches and methodologies and talk through the pros and cons of each. You also should talk together about “fit,” what specialized consulting could be useful, and what you might need from a “generalist” strategic planning consultant. Based on these deliberations, you can develop a short list of reputable, recommended consultants or firms that you believe are most likely to meet your needs.
2. **Interview consultants/firms and make your selection.** The team should draw up a simple written description of what you are looking for from your process and consultant, including a draft interview guide. Identify a small subset of people who will interview 2-3 candidates for each need and choose the consultant(s) that you believe are the best match for the organization. (The interview team could include some of all members of your strategic planning team. We do not recommend that executive directors choose strategic planning consultants on their own.)
3. **Design your process in partnership with your chosen strategic planning consultant(s).**
 - a. Name the strategic questions you seek to answer.
 - b. Name the desired outcomes for the process.
 - c. Decide what approaches and methodologies you will use. Consider how these reflect your organization’s values and attend to issues of racial equity and intersectionality.

- d. Decide how you will incorporate the essential elements (page 7) of strategically-led organizations in some form. Consider which of these elements will be the final written strategic framework or strategic plan.
- e. Decide who will be a part of this process and who will lead it.
- f. Determine how decisions will be made.
- g. Decide the time frame and budget for planning.

As you embark on your planning journey, it's important to remember that the planning process is actually the beginning of implementation. Through strategy development, organizations have the opportunity not only to explore possible futures and gain input from multiple stakeholders, but also to build the team's capacity to effectively implement a strategy and plan.

What Goes in the Final Plan

When it comes to strategic planning, the *process* and the *product* are both important. While the following may not all be captured in one written document, we feel these are generally key components of a strong strategic plan. This list will help ensure that you and your team can act on your strategy, describe it to others, and manage the aligned work.

Here's what you want reflected in the final plan:

1. The **problem(s)** you are solving, your **vision** and **mission**
2. Clarity about **values**—for many of us, our work centers racial equity
3. Clarity about **direction**—often a laser-focus goal or North Star for your work that makes sense for this time in history
4. Clarity about **strategy**—your best thinking on how to leverage your position to advance in your work and achieve your goal
5. **Accountability** vis-à-vis how well the group is succeeding—including methods for understanding your actual impact and how your organization is experienced by those with which it partners and aims to help or affect
6. **Plans to operationalize the strategy**—an implementation plan that outlines who will do what by when, plus the material and human **resources** necessary to implement the plans
7. A plan to **resource** the work—a clear business model and associated fundraising strategy
8. **A communications** plan (internal and external) - to communicate to your various audiences about your direction, values, and mission, and to shift hearts and minds
9. **A technology** plan - outlining the technology tools, practices, and policies that will support your strategy and attainment of your goals

10. **An evaluation** plan—to gauge whether a strategy is working and aligned with your values through systematic and intentional inquiry that respects multiple ways of knowing.
11. **Mechanisms and practices that will be used keep the plans current**, and to manage strategy implementation

STORIES OF BREAKTHROUGHS IN STRATEGIC PLANNING & STRATEGIC THINKING:

Coalition for Humane Immigrant Rights of Los Angeles (CHIRLA)

The **Coalition for Humane Immigrant Rights of Los Angeles (CHIRLA)** has engaged in strategic planning on a fairly regular three-to-five-year schedule. In 2013, when it began the process to develop its current strategic plan, CHIRLA had a number of core questions it was trying to explore and understand. One of these questions was about its strategy for local, statewide, and national impact. CHIRLA leaders wanted to clarify the organization's future strategic direction, since CHIRLA was increasingly feeling pressure to build from its local base in Los Angeles County to work across California and even nationally. CHIRLA's leadership also wanted to ensure that any future growth and expansion would be sufficiently resourced.



CHIRLA developed a robust plan that clarified program strategy while identifying organizational capacity needs—an important balance that can sometimes be hard to achieve in strategic planning. In particular, CHIRLA created a thoughtful resource development model to continue to attract significant support from institutional funders and individual donors, while increasing government funding as appropriate, and building a fee-based membership approach.

Working with a consultant, CHIRLA set up a strategic planning committee, consisting of both board and staff members, to design the plan. The committee engaged staff and board at key moments throughout the process, including final approval by the board. After this internal approval, CHIRLA created an executive summary of the key changes envisioned in the plan. The organization hired a well-informed and impartial consultant to share the executive summary with key stakeholders and solicit their feedback. This feedback proved important to CHIRLA as it began to implement its statewide expansion strategy and membership development program. Today, CHIRLA uses the components of the strategic plan to develop its annual work plans and to inform progress and learning at its regular staff and board retreats.

Gauging Your Organization's Readiness to Put Your Plan into Action

Part of strategic planning is building your organization's capacity to carry out the plans in the implementation phase that follows. As you decide how best to conduct strategic planning for your organization, consider your current and past experience creating and using strategy:

- What approaches have you used previously to develop strategy and plans, and how have they worked for you?
- How successful has your organization been in the implementation of these plans?
- Do you currently work with dashboards or other mechanisms to make it easy to track progress collectively toward achievement of desired goals?
- Is it an everyday occurrence for your team to have honest conversations about race, gender, power, privilege, and other identities within your organization and in the external work?
- How are you accountable to your constituencies and strategic partners?
- How effective is leadership in your organization, including board, management and program leaders?
- Does your organization have an orientation toward being a “learning community” where new ideas are readily surfaced, explored, and acted upon? How do you learn with your constituencies and strategic partners?
- How well does your organization adapt to change? What do you do now, either explicitly or implicitly, that supports your organization in being nimble and responsive to new information and changes in your environment?



Answering these questions will give you insight into your organization's strengths and areas for growth going forward. The planning process itself can serve as a “training” exercise by engaging multiple organizational players in strategic thinking and coaching them to be effective strategists. By intentionally focusing on what supporting roles and mechanisms will be needed to succeed in crafting and implementing your plan, this work can increase your likelihood of making good use of the strategy and plans you develop.

6 Conclusion

Planning can take organizations to a new level of possibility when they bring in new data and new thought partners to challenge their thinking; tailor their processes to what is most needed for their organizations or alliances; allow themselves to think out of the box and be open to transformative change; adapt strategies and tactics based on new learning and changing conditions; and use the planning process as a vehicle to energize and unite their stakeholders in a shared direction.

We hope this guidebook will support you in taking charge of your strategic planning. We are confident that you will develop a process and set of products that can catapult your organization or alliance forward to even stronger impact while building alignment and increasing your team's capacity for experimentation, learning, and advancing racial equity.

Appendix A

Detailed List of Pre-Planning Assessment Questions



1. What is propelling your interest in strategic planning at this time? What are the important questions that your organization is trying to answer or the strategic issues you are trying to address? Why is this the right time to plan?
 - a. Do you believe that your organization and your mission will be around 10 years from now? Why or why not?
 - b. What is the state of the systems of which you are a part?
 - c. Does the answer to either of the questions above suggest other strategic issues with which you should grapple?
 - d. What will success for this strategic planning process look like?
 - e. What are the “lines in the sand,” “sacred cows,” or “constraints” at play?
 - f. What are the “elephants in the room”?

2. How healthy is your organization overall in this moment? What does a review of your “organizational vital statistics” (mission, programs, campaigns, governance, partnerships, finances, etc.) tell you about what needs attention?
 - a. Are there any current or looming crises? (If so, this may not be a good time for strategic planning.)

3. What is the strength of your organization’s leadership and the quality of the relationships among different levels of leadership? (Planning can bring people into alignment, but it is rarely a process that will bridge significant rifts.)
 - a. What is the relative strength and quality of the board chair-executive director relationship?
 - b. What is the relative strength and quality of the executive director-senior staff relationship?
 - c. Do you have strong leaders in your organization (board, senior staff)? What about your managers? Do you have a deep bench?
 - d. Is there any impending transition in leadership?

4. What is your analysis of culture, values, race, power, privilege, and other identities within your organization, and how should that inform the design of your planning process?
 - a. What is the formal and informal power structure in your organization?
 - b. What are the values that animate your work and mission?
 - c. Justice and equity are core values for most social justice organizations. In what ways does an understanding of racial equity with an intersectional lens

- shape your work with partners and the community? How does racial equity manifest in your organization? In what ways is your organization falling short of living your values of justice and equity?
- d. How would you characterize the culture of your organization? How do you get work done? Is your culture “functional”?
 - e. Who sets the “tone,” “feeling,” and/or “pace” of the organization?
5. What are your preferences in the design of the strategic planning or strategic thinking process? Whose engagement and input do you need to ensure you develop a well-informed, well-supported plan? Over what time could/should the planning happen?
 - a. When is the last time you did strategic planning or strategic thinking, and what worked well about that process? What did not work well?
 - b. How do you use strategy now? How do you set goals and plan currently?
 - c. Given your questions, what information do you need to collect? From whom? In what ways? Whose input is needed?
 - d. Do you have an updated theory of change and is it generally understood by board and staff? How clear is what you do and why internally, and to your various communities? Should a look at your theory of change be part of this process?
 - e. How do you currently engage your base?
 - f. Who needs to be involved? In what ways?
 - g. What’s your appetite for the process in terms of time and resources?
 - h. How do you imagine decisions will be made in this process? What’s your usual practice? How will that approach advance your value of racial equity with an intersectional lens?
 - i. What’s your experience working with consultants? Are you working with other consultants now? If so, how will their work inform or relate to the strategic planning process?
 - j. What would be a good consultant fit for your group?
 - k. Do you have particular expectations or hopes for how the process is managed?
 - l. Who will be the key organizational liaison (holder of this process, partner to the consultant)?
 6. How much data on your strategic questions can you generate internally, and how much new data collection is likely needed?
 7. What are the tools or products you would like at the end of the strategic planning process?
 8. Based on your preliminary assessment, is a comprehensive planning process or a more streamlined process the right thing for your organization or alliance at this time? Or should you consider putting any planning process on hold to address more pressing matters?

Appendix B

Organizational “Vital Statistics” Outline

Vital Statistics Outline

This tool can be helpful early in a planning process. It is one way to organize facts about the organization **so that all stakeholders engaged in the planning have the same baseline information available to them** – whether they are board members, staff, community members, partners, etc.

If **trend** data is presented about fundraising, finances, membership growth, etc. – **this tool also helps stakeholders pinpoint issues that would benefit from attention in the planning process.**

This is a suggested outline that should be adapted to fit the interests and concerns of your organization.

Elements to Consider Tracking

- I. Mission: What is your mission and what is your theory of change?
- II. Programs: What are the current programs? What is their scope? Their relative strength and value? How do you know?
- III. Campaigns: Are you currently in a campaign? What is the current status of your campaign or campaigns?
- IV. Governance Structure: What is the governance structure? Who is on your board and are its members working well together to fully inhabit their roles?
- V. Partners and Networks: With whom are you collaborating and for what purpose? What are your network’s relative strengths and values, given your mission and the current context?
- VI. Funding: What are your organization’s sources of funding?
 - a. What is the proportion of funding that comes from these sources and how reliable are they likely to be going forward?
 - b. What do you notice about whether funding has increased or decreased from any particular source or type of revenue?
- VII. Financial Health: What is your organization’s financial health and the status of its compliance requirements?
 - a. Have you had balanced budgets the last few years? If you drew on reserves, was it for a strategic purpose or because you had no other choice?



- b. What is your current budget for this fiscal year and how much of that budget has already been raised?
- c. Have you had clean audits?
- d. What is the total equity figure on your balance sheet? Are there any other key observations from your balance sheet?
- e. How much does your organization have in unrestricted reserves?
- f. What is the current mix of different sources of revenue?
- g. What is your business model? What are the operating assumptions about your revenue mix that underlie beliefs about your organization's sustainability?
- h. Do you develop fundraising strategies each year? What's the forecast for revenue for the upcoming fiscal year? Are any major funders phasing out?
- i. What is the status of your latest 990? What is the status of your state-based filings? If you do lobbying, have you made the 501(h) election? If you do lobbying, do you have a system to track lobbying and ensure your organization is in compliance?

VIII. Capacity: What is your organizational capacity?

- a. Evaluation: What kind of data do you have now to inform your understanding about your impact?
- b. Staff: number, distribution, tenure, expertise, diversity, knowledge-management systems, professional development/talent pipeline approach
- c. Communications: To what degree are your communications intentional, strategic, resourced, and effective?
- d. Technology: To what degree and in what ways does technology inform and advance your mission?

Appendix C

Different Methodologies Frequently Used To Support Strategic Planning

Below are some different methodologies used to develop strategy. They are not necessarily comprehensive approaches to strategic planning on their own, yet each can play a valuable role in strategy development.

Design Thinking

Design thinking often refers to applying the methods and approaches used by designers including architects, urban planners, and product developers. There are many different understandings of design thinking. It is generally understood that design thinking methods share the following common traits: 1) creativity, 2) ambidextrous thinking—whole body and whole brain approaches, 3) teamwork, 4) user-centeredness and empathy, 5) curiosity, and 6) optimism. Social justice groups sometimes use design thinking to center the needs of the people being served at the core of the strategic planning process. One premise of design thinking is that the bigger the problem (or the more the constraints), the more magnificent and creative the solution. For more about design thinking and its application, see [Stanford Design School](#), [Interaction Institute](#) or [Idea Lab](#).

Future Search

Started by Marvin Weisbord and Sandra Janoff, [Future Search](#) is a defined approach to a three-day planning meeting. On their website, they describe Future Search as a “planning meeting that helps people transform capability for action very quickly. The meeting is task-focused. It brings together 60 to 80 people in one room or hundreds in parallel rooms. People tell stories about their past, present and desired future.” Several principles form the basis for Future Search: 1) Getting the whole system in the room; 2) Exploring all aspects of a system before trying to fix any part; 3) Putting common ground and future action front and center, 4) Treating problems and conflicts as information, not action items; and 5) Having people accept responsibility for their own work, conclusions, and action plans.

Scenario Planning

Scenario planning—which is often associated with the work of physicist and military strategist Herman Kahn—is an alternative or supplement to research on trends. Scenario planning can be done in many different ways. One method starts by dividing a group’s knowledge into two broad domains: 1) things we believe we know something about, and 2) elements we consider uncertain or unknowable. Using stories or “scenarios,” the group works through a strategic thinking process to identify the probable outcomes and implications. The part of the overall process that is radically different from most other forms of long-range planning is the central section, the production of the scenarios. At its most basic level, scenario planning follows six steps: 1) Decide on the drivers for change and a group’s assumptions; 2) Bring drivers together into a viable framework; 3) Produce seven to nine initial mini-scenarios; 4) Reduce to two to three scenarios; 5) Draft the scenarios; and 6) Identify the issues arising. When scenario planning is integrated with a systems thinking approach to scenario development, it is sometimes referred to as “dynamic scenarios.”

Theory of Change

As with strategic planning, there are competing views and opinions about developing and using theories of change. The Aspen Roundtable for Community Change pioneered the theory of change approach in the 1990s, mostly applying it to community change initiatives. Later, they expanded this approach to such topics as structural racism, international development, public health, human rights, and more. A theory of change is essentially an organization’s blueprint for how to bring about the change it is seeking in the world. Organizational leaders develop their “theory” of what the necessary building blocks are to bring about their “intended impact.” A core assumption of the theory of change methodology is that social problems, by their nature, are complex. Thus, no single organization alone can bring about these changes.

Strategic Concepts in Organizing and Policy Education (SCOPE), founded by Anthony Thigpenn and currently led by Gloria Walton, identifies three parts to an organization’s theory of change (analysis, goals, and strategies) and lays out a series of questions that social and racial justice organizations can ask in building their theory of change. Many practitioners develop theory of change flow charts that start with strategies and activities and then outline short-term outcomes, intermediate outcomes, long-term outcomes, and an organization’s ultimate goal or vision.

Practitioners have documented numerous challenges that groups face when wrestling with these big long-term questions. Yet, leaders and consultants also describe the theory of change planning process as enormously robust and an exceptionally powerful tool. They say it helps to bring multiple perspectives to the table and to align and focus an organization on where it can have the greatest impact in the larger ecosystem in which it operates.

Transformative Practices

Transformative practices link human transformation with organizational and social transformation. While these practices and technologies are not strategic planning methodologies per se, many leaders point to them as being key to breakthroughs in their strategic thinking and/or effectiveness in pursuing their strategic directions. Recently, a field of practitioners has set out to bring transformative practices to social and racial justice organizing. These include: Black Organizing for Leadership and Dignity (BOLD), Rockwood Leadership Institute, Social Transformation Project, Generative Somatics, Forward Together, Move to End Violence, Movement Strategy Center, Momentum Institute, and the Applied Zen Program of the Institute of Zen Studies.

Forward Stance is a transformative practice that some FLA grantees are integrating into their practice, including into their planning processes. It is mind-body technology co-developed by Norma Wong (of the Applied Zen Program of the Institute of Zen Studies) and Forward Together (formerly Asian Communities for Reproductive Justice) to support leaders as they identify solutions and build their capacity to pursue them. A basic premise of Forward Stance is that we can find answers and interrupt habits much faster through the body than through our minds. In an interview in *transform* (an online magazine produced by the Center for Transformative Change), Wong explains: “*Forward Stance* is a mind-body approach to movement building. A mind-body approach utilizes the physical *experience* to develop, explore, and demonstrate human actions. By developing a physical and conceptual understanding of basic *Forward Stance* principles, organizations and allies can literally shift the way in which we move in the world. The basics include characteristic principles of stance, energy, awareness, and rhythm. *Forward Stance* emphasizes proactive, strategic action that draws from sustainable energy in a constantly changing environment.”

Forward Stance is a powerful tool for unlocking the creativity and curiosity of a team—allowing them to ask difficult questions and challenge assumptions that often limit nonprofit organizations. Dana Ginn Paredes, co-founder of Momentum Institute and a senior trainer in Forward Stance, has done Forward Stance work with FLA plan consultants, staff, and grantee leaders.

Appendix D

Readings on Strategic Planning

The following are some additional resources on strategic planning. We recognize that much of the wisdom on strategic thinking and planning among social justice leaders, leaders of color, LGBTQ leaders, immigrant leaders, and women leaders—among many—never makes it to print. If you are interested in sharing your experiences and insights, we would love to hear from you!

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