

Strategic Planning with Effectability, LLC

We believe that strategic planning is much more than a once-a-year event yielding a document that sits on a shelf. It should be an ongoing process that shapes and guides the decisions and actions of an organization. With this in mind, our strategic planning service is designed to be an ongoing part of your organization's business, not a single event. After our process is complete, you will be able to answer the questions:

1. Who are we?
2. Where are we now?
3. Where are we going?
4. How will we get there?

After participating in our strategic planning process, leaders of other organizations have reported the following outcomes:

- Leadership, employees and key stakeholders understand the issues and challenges that currently impact the organization and have an awareness of what might impact the organization in the future.
- Leadership is able to direct key resources (time, people and money) toward the priorities that most closely align with and positively impact the organization's mission.
- Priorities and expected outcomes are more clearly understood among staff, leadership and board members leading to a reduction in conflict, frustration, misunderstandings and re-work.
- Decisions are more efficient and rational, with the short and long term risks, benefits and trade-offs evaluated through the lens of the plan.
- Stakeholders distinctly see the link between key initiatives and the organization mission, increasing their level of support.
- Employees clearly see the impact their daily work has on the mission, helping them be more engaged and satisfied.

Process Framework

The framework below has been proven to produce tangible, actionable strategic plans. It can be adapted to meet your organization where you're at and to suit your timeframe and budget.

Step/Timing	Inputs	Who involved	Questions this step addresses	Outcomes
Analyze stakeholders 6-8 weeks prior to retreat	A list of current and potential stakeholders	Representatives from staff, the board, volunteers, service recipients, current and potential funders, current and potential partners, and community leaders	What does the stakeholder expect from the organization? What are the organization's greatest strengths/weaknesses? What are some of the best ways the organization can help our community? What are some gaps in the organization's service? What are other organizations similar to ours doing better or worse?	A description of the stakeholder groups, their characteristics and how well their needs are being served.
Analyze the budget	Organizational budget	Subteam of the planning team	What are some trends in our financial management and budgeting? What	An understanding

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2 weeks prior to retreat	information, trends in the budget, project expenses and size. Budget projections based on current trends		revenue sources can be increased? What revenue sources are decreasing?	of current financial state.
Perform an environmental scan. 2-4 weeks prior to and/or during retreat	Stakeholder feedback, industry research	Planning team with opportunity for staff involvement.	What trends will affect our business in the future? What is our competition doing? What best practices or innovations exist in our field? What opportunities for collaboration exist?	A summary of the environment in which our organization operates.
Perform an analysis of strengths, weaknesses, opportunities and threats Prior to and/or during retreat	Environmental scan information, stakeholder data	Planning team with opportunity for staff involvement	What do we do well? What needs to improve? What external developments may strengthen our organization in the future? What external developments may weaken our organization in the future?	An analysis to help distinguish our organization from others' to sustain our niche.
Create a mission statement or confirm an existing one. During retreat	Stakeholder feedback, competitive data, community statistics	Planning team	What is our purpose? What impact do we want to make in the community?	A clear, concise, one to three sentence mission statement.
Create a vision statement or confirm an existing one. During retreat	Mission statement, stakeholder feedback	Planning team	What difference do we want to see in three-five years? Where do we want to be in the future? What condition will change as a result of our work?	A clear, concise one to three sentence vision statement.
Create a values statement or confirm an existing one. During retreat	Mission and vision statements	Planning team	What values will guide us as we work toward our mission and vision? What values are most relevant in carrying out our work? What uniquely guides our work?	Four to six values the organization believes are most important to fulfil the mission.
Determine organizational priorities. During retreat	Mission and vision statements, financial information, SWOT	Planning team	Where will we focus our limited resources? How will we know we are successful?	Three to five long term goals.

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	information			
Determine specific strategies for each priority area. During retreat	Organizational goals	Planning team	What are the short term objectives that will move the organization towards each goal?	Three to five objectives for each goal.
Create draft action plans. During retreat	Organizational goals and objectives	Planning team	What specific tasks need to be done in year one and two to accomplish the stated objectives? What work will we say “yes” to; what will we say “no” to?	Tactics to accomplish the objectives including timeline, responsible parties and costs.
Gather stakeholder feedback. Within 4 weeks after retreat	Mission, vision and values statements, SWOT, goals/ priorities	Planning team, other board members and stakeholders	What did we miss? What needs further discussion?	Feedback from stakeholders to guide the process.
Finalize and approve the plan Within 6 weeks after retreat	Strategic plan document	Board members	How will we hold each other accountable for the objectives? How will we monitor the strategic plan implementation? What did we learn during this process? What will be different next time?	A final, approved plan.
Regularly review the action plan, confirm progress and adjust Ongoing	Action plan, financial data, program data, other measures	Board members, executive director, Effectability consultant	Based on our measures, are we on track to achieve our goals or priorities? What adjustments need to be made? What needs to be reprioritized?	An updated action plan.

About Allison Cooley, MEd – CEO of Effectability, LLC

Allison is an experienced facilitator, strategic advisor and leadership coach based in Madison, Wisconsin. Since 1990, Allison has made an impact on more than 20,000 individuals at hundreds of organizations across the US in her professional development workshops, strategic and operational planning retreats and one-on-one leadership coaching sessions. As Founder and CEO of Effectability, LLC, Allison’s unique approach to strategic planning centers around her ability to ask the right questions that challenge conventional thinking and leads to a higher level of performance. Known for her enthusiasm, candor, and her deep knowledge of people and organization systems, leaders turn to Allison for her insights and wisdom to help them set a clear strategic course, navigate through change, and move forward.

Allison holds a Certified Executive Coach designation from the Center for Executive Coaching, is a Board

Certified Coach (Center for Credentialing and Education), is a Myers-Briggs practitioner (CAPT) and is DiSC certified (Wiley). She is also a certified trainer for Richardson, CPP, and Erickson & Company. She received her bachelor's degree from the University of Wisconsin-Eau Claire and her master's degree in Adult Education from the University of Minnesota.

A sampling of client experiences

Sandy Morales, CEO, Big Brothers, Big Sisters of Dane County

"BBBS of Dane County approached Effectability, LLC because we had just gone through a leadership transition and needed help determining our future direction. Allison helped BBBSDC with our strategic planning process by reaching out and getting input from all our constituents. The result was a strategic plan with goals for staff and board leadership to develop and execute. I really liked how Allison was able to share all the information with staff and board so we could determine our goals. I found the experience to be incredibly useful as we think about the growth and sustainability of our mentoring program. I would recommend Effectability, LLC to nonprofits who underwent a leadership transition and need help and guidance determining their long-term goals."

Tom Grogg, President, Millennium Soccer Club

"Our board of directors recently sought assistance from Allison Cooley of Effectability, LLC because we realized that Millennium needed to develop a strategic plan which would not only enable us to improve our current operations, but also put us on a path to greater long-term sustainability.

In our exploratory meeting with her, at which we described our basic needs, it became clear from the questions she asked and the suggestions she offered that she would be an excellent person to provide us the guidance we needed to be successful in our planning endeavor.

Allison's preparation for, and management of, our three-hour planning session was superb. She related well with each of our board members, who range in age from 29 to 72, and did an excellent job of keeping the discussion going and on-track. As a result, we had a lively, substantive, and productive discussion of the issues that we need to address in creating our strategic plan. All of our members left the meeting confident that we were well prepared to move forward with our strategic planning process. We would recommend Effectability without hesitation for any organization seeking to become more adept at assessing the quality of its work and developing, or refining, its strategic goals."

Katherine Dellenbach, Chair of the Wisconsin Women's Network (WWN)

"I approached Effectability, LLC because it had been several years since our nonprofit had done strategic planning. At the time, the majority of my board members had recently taken positions on the board, and I was especially looking for a way to connect all of the board members to each other and the organizational mission moving forward.

Effectability, LLC provided quality, thoughtful facilitation of our strategic planning process. Not only did my board members feel comfortable throughout the process, but Effectability, LLC provided a well-organized and productive environment that allowed for my board to more effectively communicate to each other and work together to establish our mission, values, and goals for the future. The result was phenomenal. Not only were we able to nail down a solid mission and values statement, but we also were able to take ownership of different parts of the plan moving forward. Since going through the

strategic planning process with Effectability, LLC, our organization has had a more directed, organized plan for the future.

I would highly recommend Effectability LLC to people who are looking to both enhance and strengthen the foundation of their organization or business.”

Sharyl Kato, Executive Director, The Rainbow Project

“As someone who has been in the non-profit world for over 3 decades, I have had experience and exposure with many consultants and strategic planning facilitators. So it takes a lot for me to be impressed. What is unique about Allison is the just right balance of experience, skills and personal style to make her an incredible facilitator and coach. She has the rich experience, knowledge and skill in knowing organizations, growth & development as well as process from the bigger picture. Yet she also has the knowledge and experience of the individual employee & group dynamics as well as the details of setting a clear pace and outline for helping organize complex issues into manageable, clear concepts that maximizes positive decision making and creative problem solving skills for both individuals and groups. The special ingredient often missing with facilitators is energy, enthusiasm, fun, humor, genuine caring and a crisp understanding and confident style that compliments their expertise. You have the best of all worlds with Allison Cooley helping to work through the toughest challenges for an organization to move on!”