

THE CULTURALLY CONSCIOUS BOARD

BOARD DEPTH SERIES

Strategic Planning Worksheets

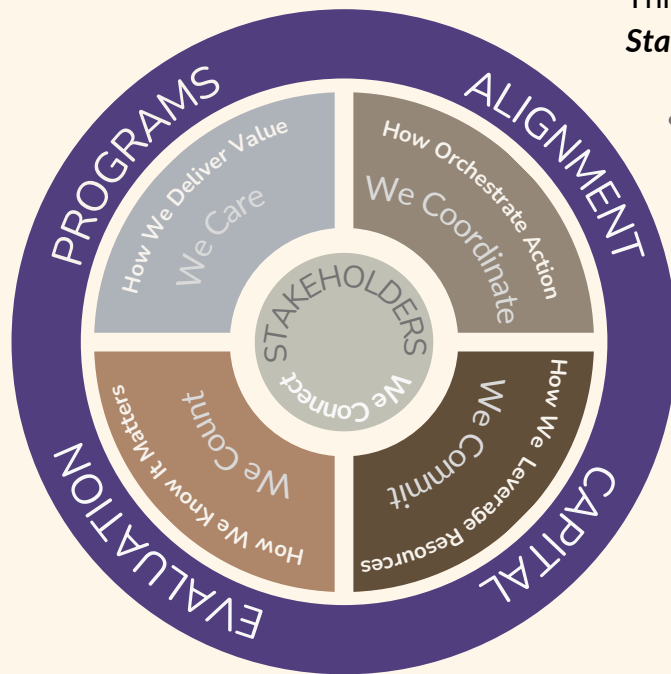
A Tool to Help Boards Commit to
3-Year Advanced Planning Cycles.

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Choosing a Capacity Building Approach

Strategic planning begins by establishing “Situational Awareness” to account for where you are compared to the change you want to realize through your efforts. A serious strategy will be realistic about your current capacity and the requirements to bring about the changes that matter most to your mission and its stakeholders.

This strategic planning process deepens five fundamental capacities:
Stakeholders, Programs, Alignment, Capital and Evaluation.

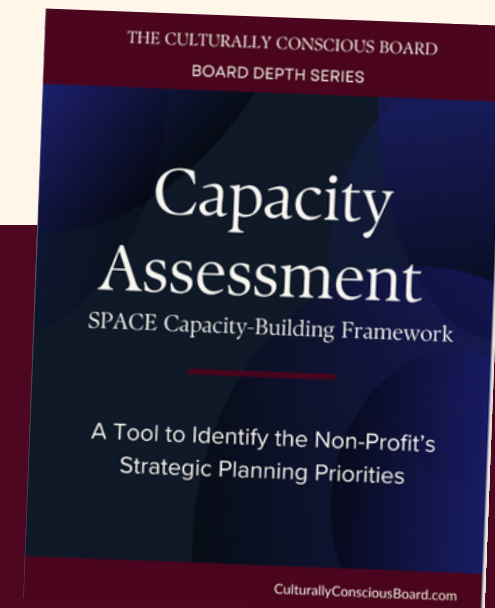


Your Promise Fulfillment System

- **Connection | Stakeholders** - *How do our stakeholders define success for themselves, and how is this reflected in our programs and services?*
- **Care | Programs** - *How do we deliver the value we expect of ourselves, in the manner our theory of change requires of us?*
- **Coordination | Alignment** - *How do we sequence activities to achieve the transformation we expect from our programs and services?*
- **Committal | Capital** - *What commitments must we make or secure to leverage the resources needed to deliver our programs and services?*
- **Count | Evaluation** - *What learning must we collect, and measure to know how our efforts have mattered as intended?*

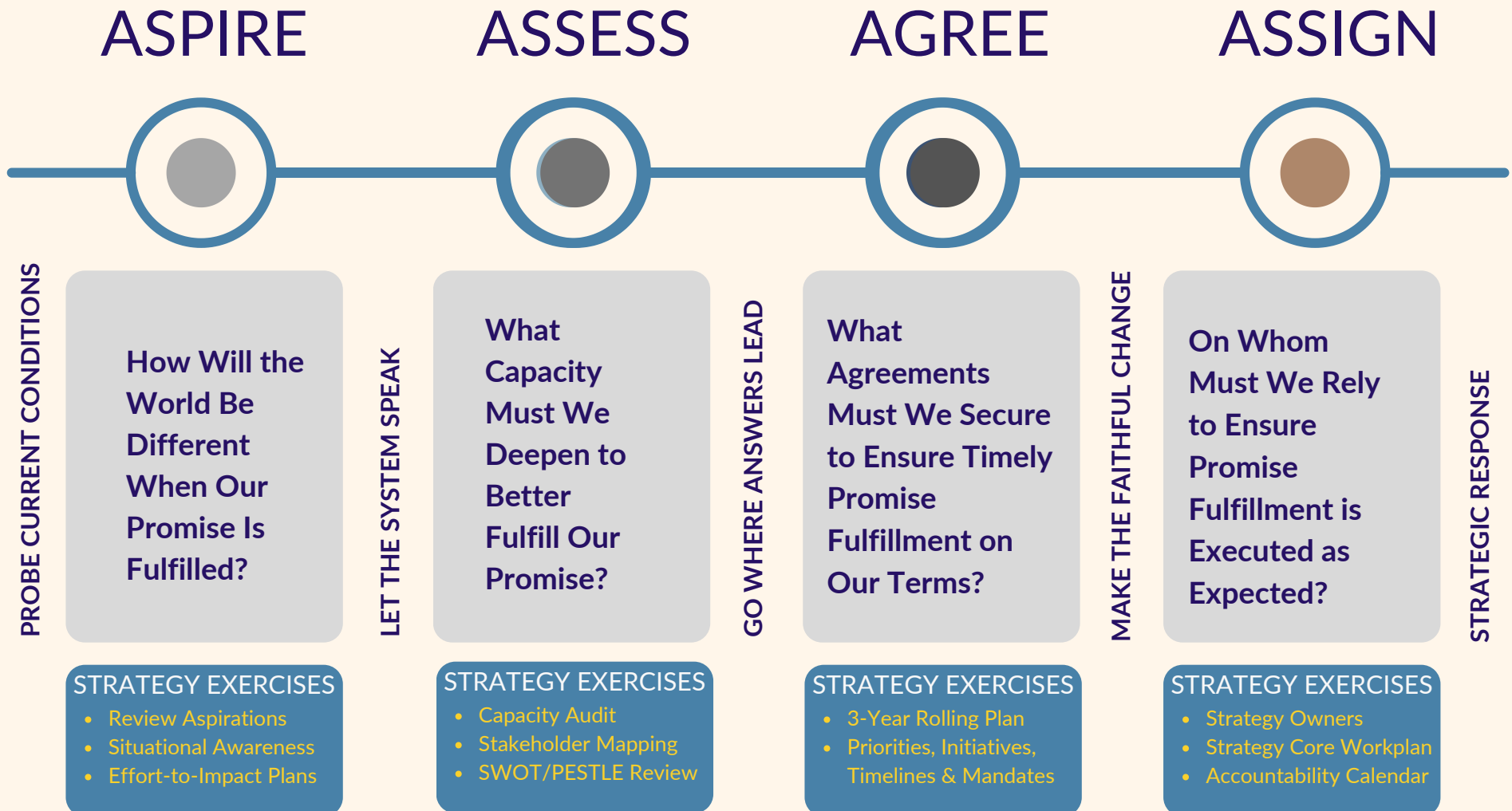
Take the Capacity Assessment

We have prepared a 50-question assessment to help non-profit leaders determine how well their organization addresses the SPACE Framework's five capacities. There are no right nor wrong answers. Instead, this tool can help a board, executive or staff team to think through areas which need intensive strategic attention. This tool is recommended as a preparatory step when an organization is preparing for the strategic review or strategic planning process.



THE STRATEGY DESIGN PROCESS

The strategy design need not be a mysterious, drawn-out process. While every organization has its own complexities, the plan must be simple enough for everyone to understand what is required, why and how to complete it. The process is organized around four tasks that make up the capacity planning process. These are: **Aspire**, **Assess**, **Agree** and **Assign**. The process items for each task are illustrated below.



STAGE ONE

Aspire

THE STRATEGY | A HOW-TO PLAN FOR IMPACT

Aspire

Exercises: Base+Advance

- Positive Progress List
- Impact Fulfillment Map (Outcomes Logic Model)
- Impact Wishlist

Assess

Exercises: Capacity Audit

- Strategic Questions
- Stakeholder Empathy Map
 - Gap Analysis: PESTLE/SWOT
 - SWAG Budget: Resource Wishlist

What is a Capacity-Focused Strategy?

A strategy is an agreement management process that ensures a timely promise fulfillment process aligns between opportunity and intended impact, in spite of uncertainties and obstacles. A "Capacity-Focused Strategy" starts with a team reflection process to gain situational awareness in light of existing capacity.

Assign

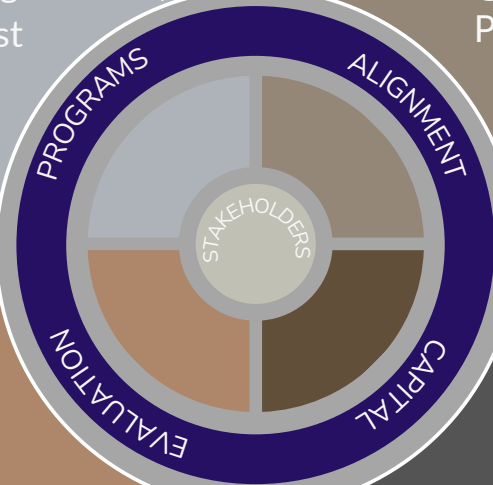
Exercises: The Champions

- Strategy Owners, One Per Strategy
- Strategy Core Workplans
- Accountability Calendar

Agree

Exercises: The Committals

- Strategic Priorities
- Strategic Initiatives
- Strategic Timelines
- Strategic Mandates



ASPIRATIONAL FRAMEWORK

MISSION
THE WHAT

VISION
THE WHEN

VALUES
THE HOW

MANDATE
THE WHO

PROMISE
THE WHY

PLANNING NOTES

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STAGE TWO

Assess

SITUATION | STRATEGY RESPONSE

PAST PROGRESS

PRESENT PREDICAMENT

PREFERRED FUTURE

OPPORTUNITIES

OBSTACLES

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SITUATIONAL AWARENESS CHECKLIST

- | | |
|--|--|
| <input type="checkbox"/> CONDUCT CAPACITY AUDIT | <input type="checkbox"/> CONSULT IMPACT REPORTS |
| <input type="checkbox"/> CONDUCT SWOT OR PESTLE ANALYSIS | <input type="checkbox"/> CONSULT CURRENT LOGIC MODEL |
| <input type="checkbox"/> CONDUCT BUDGET/RESOURCE REVIEW | <input type="checkbox"/> CONSULT STAKEHOLDER INPUT |

STAKEHOLDER EMPATHY MAP | WHAT DO THEY CARE ABOUT?

Instructions. Convene feedback from as many stakeholders as may be impacted by the strategic plan, its goals and initiatives. Consider: Board, Executive Staff, Program Officers, Volunteers, Donors, Beneficiaries, Vendors and Compliance Agencies.

FEEDBACK ON DELIVERING CARE?

FEEDBACK ON FULFILLMENT PROCESS?



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FEEDBACK ON IMPACT?

FEEDBACK ON RESOURCE NEEDS & USE?

STAKEHOLDER EMPATHY MAP

PROGRAMS

On Which Programs Must Our Strategy Focus?

Who Must Make Changes in Our Fulfilment System?

ALIGNMENT

STAKEHOLDERS

Who Are the Stakeholders We Care About and Who Care About Us?

What Must We Compare to Know the Impact of Our Strategy Focus?

How Do We Get More or Less of the Resources Needed for Our Strategy?

EVALUATION

CAPITAL

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STAGE THREE

Agree

STRATEGY WORKSHEET | 3-YEAR ROLLING PLAN

ORGANIZATION

DATE

Next Step Priorities	2025 Year 1 Goals/Initiatives	2026 Year 2 Goals/Initiatives	2027 Year 3 Goals/Initiatives	2028 - 2078 Year 4 thru 50 Ideas*
1				
2				
3				
4				
5				

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PLANNING NOTES

SMART GOAL TEST

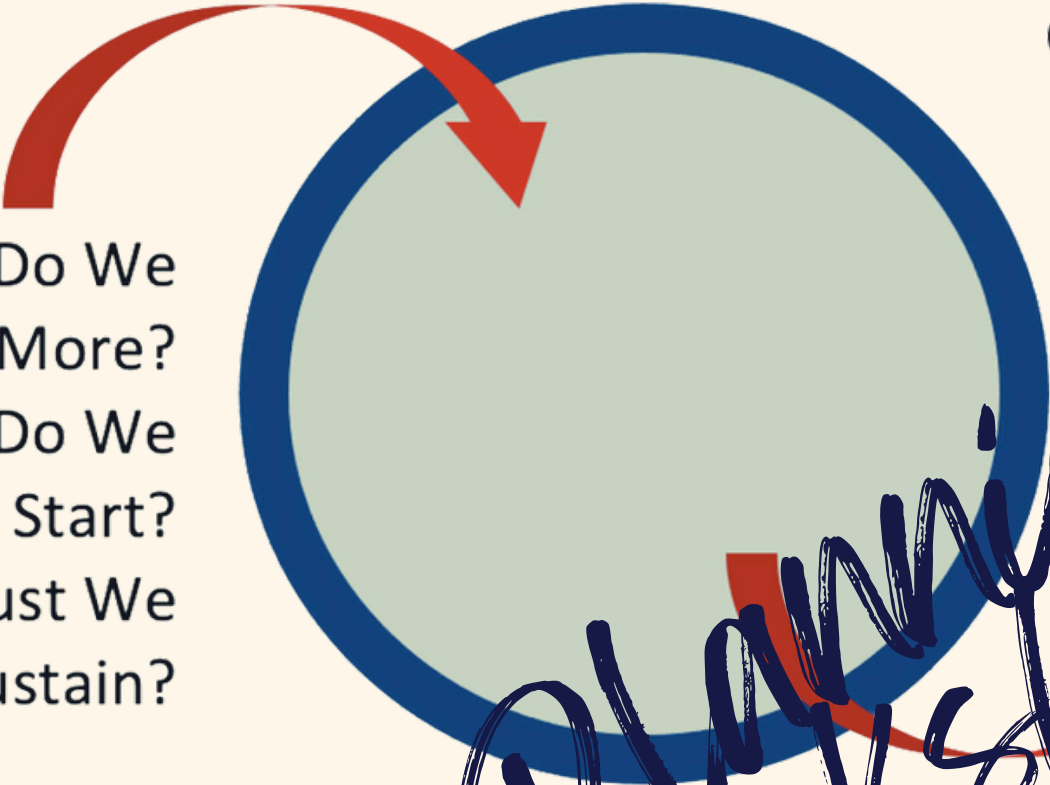
- SPECIFIC?
- MEASURABLE?
- ACHIEVABLE?
- RELEVANT?
- TIME-BASED?

*3-Year Rolling Strategic Plan | Replace Current Year with Year 4 Goals During Annual Strategy Review.

STRATEGY REVIEW RESPONSE | SEARCH FOR TOP 5 PRIORITIES, NEXT 3 YEARS

IN LIGHT OF OUR EMERGING STRATEGY HORIZON

Of What Do We
Need More?
What Do We
Need to Start?
What Must We
Sustain?



Of What Do We
Need Less?
What Do We
Need to Stop?
What Must We
Strengthen?

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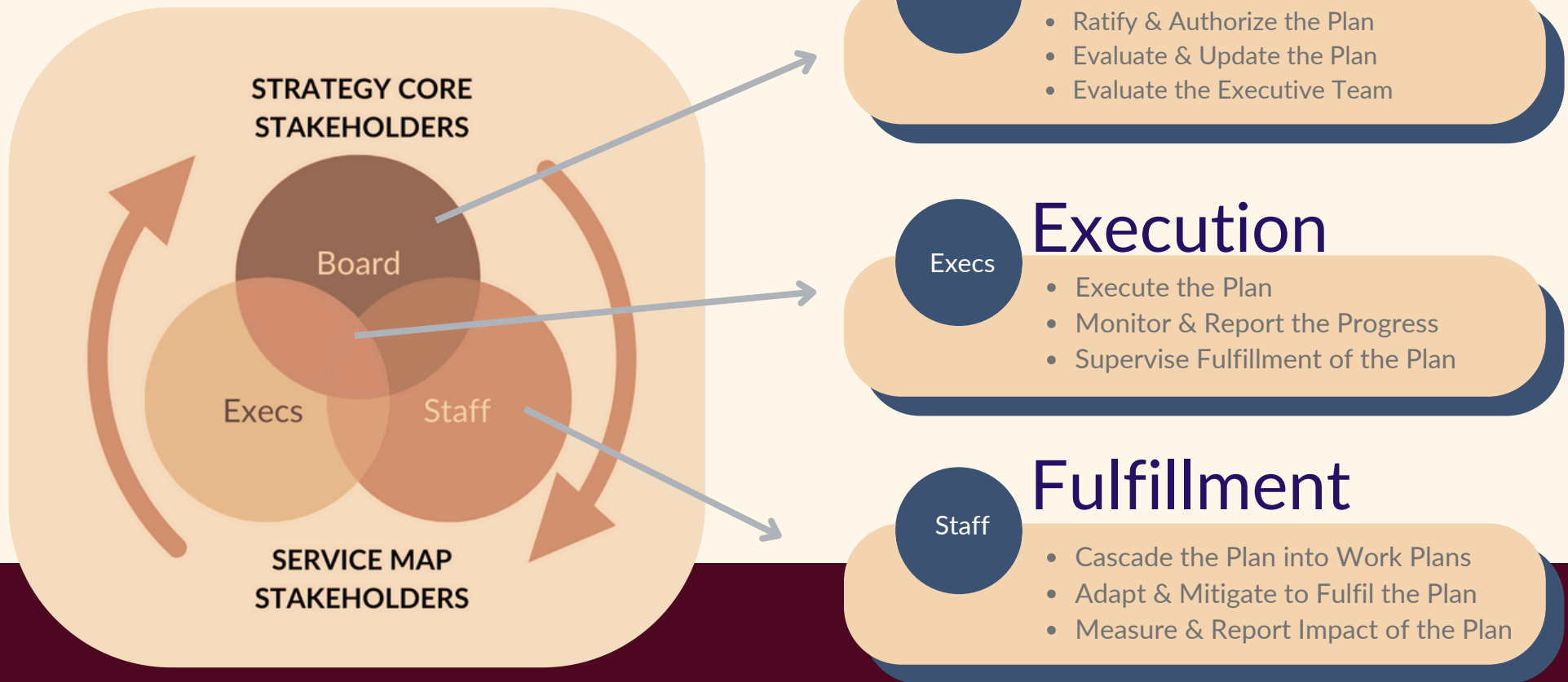
Notes

STAGE FOUR

Assign

STRATEGY CORE | COORDINATED IMPLEMENTATION TEAM

Strategies are seldom more effective than the execution system upon which they must rely for success. Taking stock with this team, is the first step in in Deep Capacity Strategic Planning.

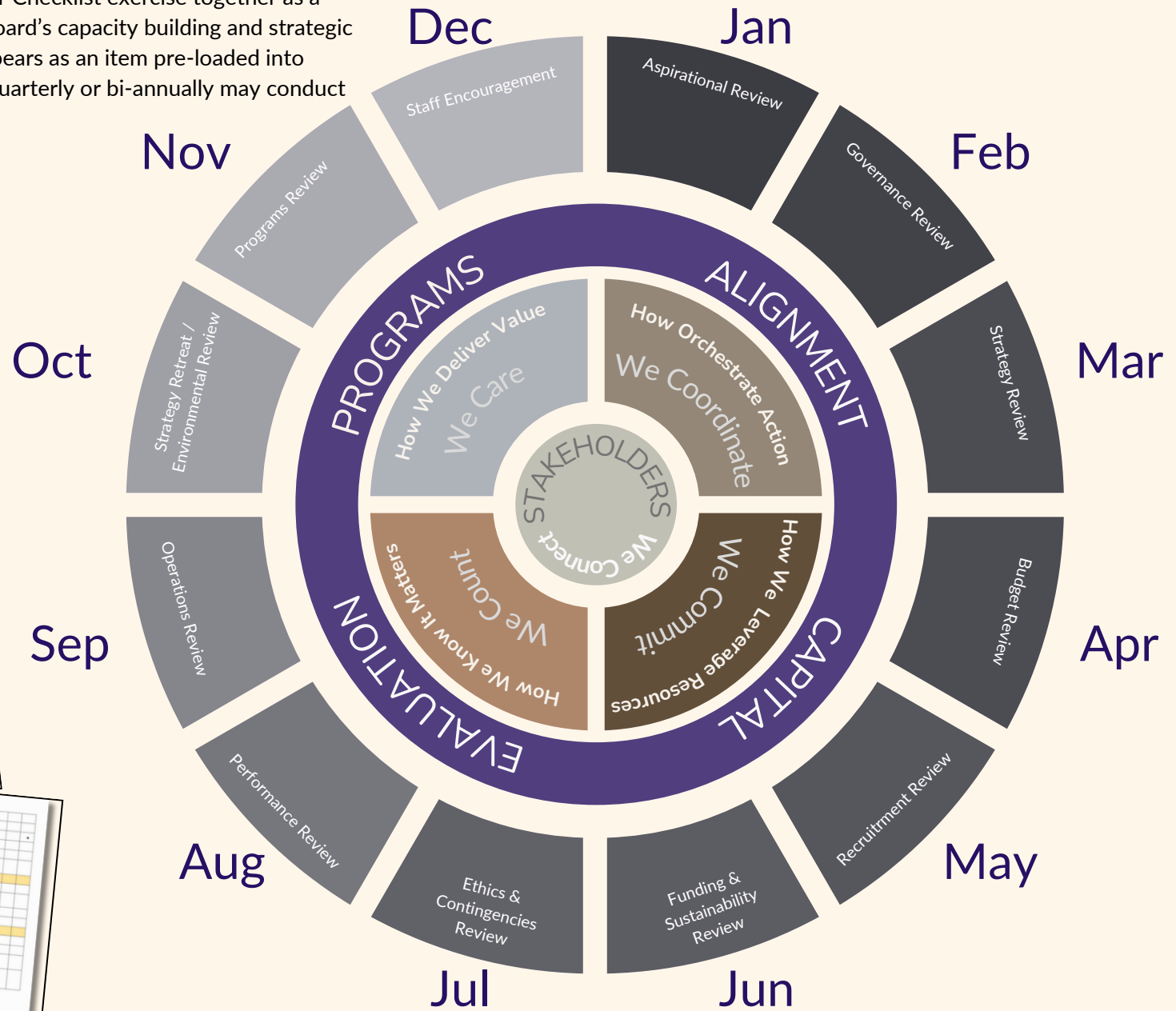
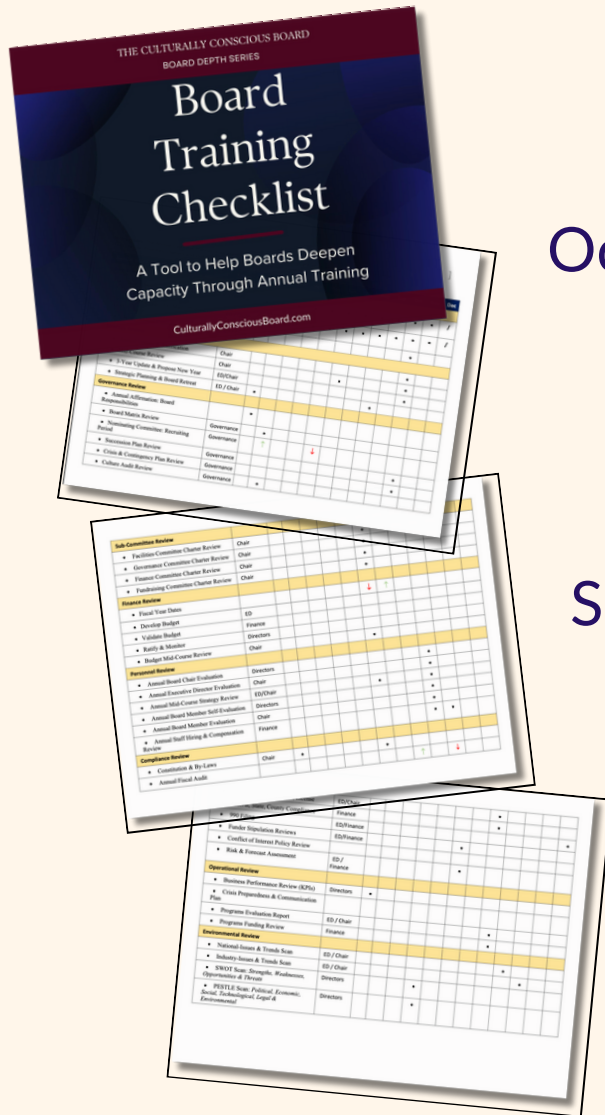


The Strategy Core consists of the alignments between the Board, Executives) and Staff that results in the fulfillment of the mission.

- **The Board** sets missional intent through its policy-informing aspirations, authorizations and actions. It authorizes, oversees and evaluates progress and impact of the strategy and the executive(s).
- **The Executive(s)** translate the board's policy mandates into aligned, actionable and accountable fulfillment system, consistent with mission, vision and values.
- **The Staff** implements, executes and evaluates direct impact, while producing outputs, measuring outcomes and gathering feedback.

WORKSHEET | BOARD ANNUAL TRAINING CALENDAR

Instructions | Complete the Annual Calendar Checklist exercise together as a board. Create an Annual Calendar for the Board’s capacity building and strategic oversight. Note: Each monthly “Review” appears as an item pre-loaded into monthly board agendas. Boards that meet quarterly or bi-annually may conduct reviews accordingly or by sub-committees.



See Board “Conversation Starters Series” at culturallyconsciousboard.com

BOARD ANNUAL CALENDAR

WORKSHEET

Dec

Jan

ORG

DATE

Nov

Feb

Oct

Mar

Sep

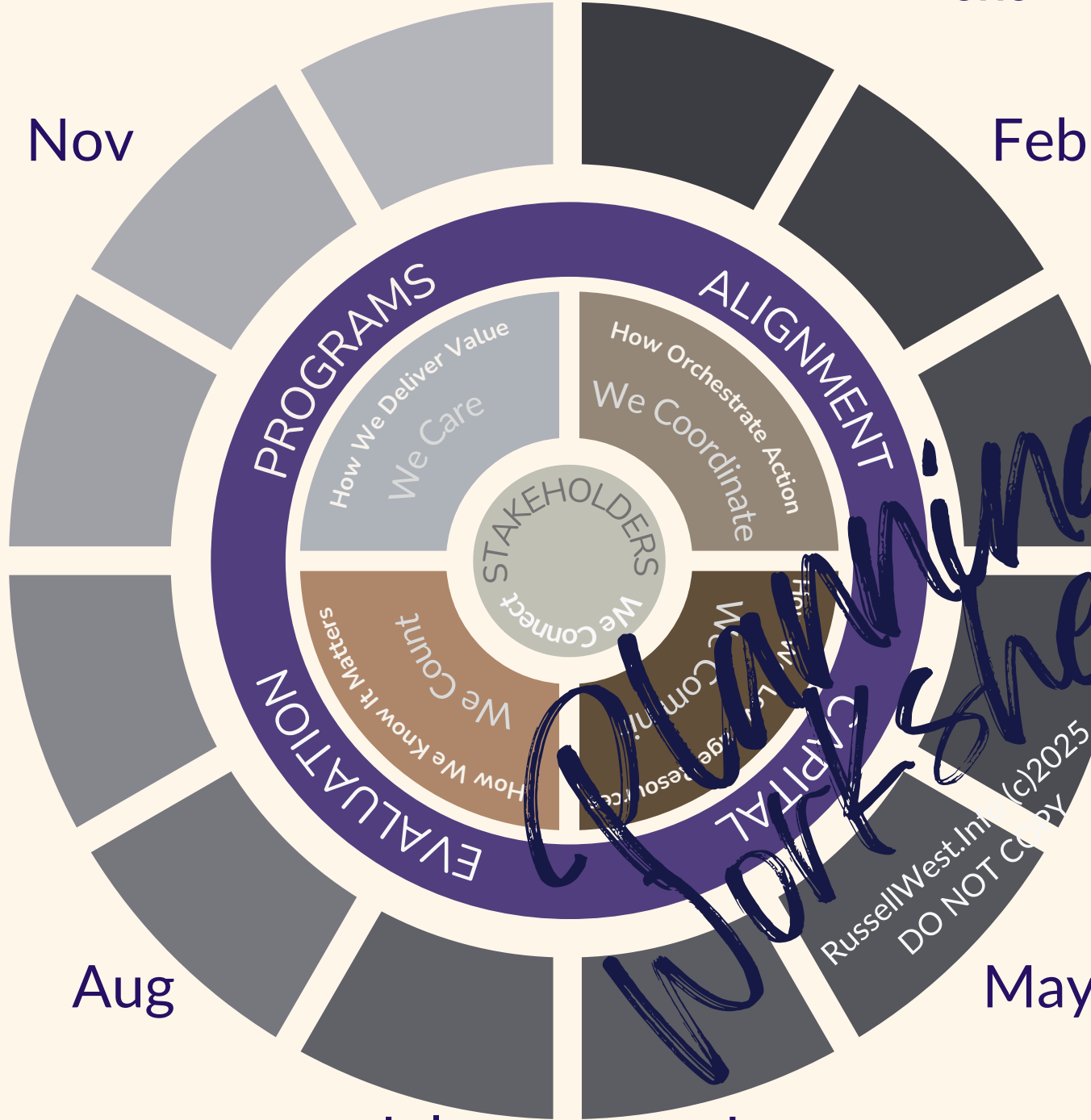
Apr

Aug

May

Jul

Jun



STRATEGY REVIEW SCREEN

Logic Model	Screening Criteria Mission: Instructions: When designing, refining or approving strategic initiatives, Deep Capacity Boards ask capacity-deepening questions. Evaluate every strategy, giving your review when proposals Fits, Needs Work or Does Not Fit . Your mission deserves mastery & depth.	STRATEGY FIT SCORE:				
		STRATEGY 1	STRATEGY 2	STRATEGY 3	STRATEGY 4	
IDENTITY	Capacity Question: How Does It Deepen Who We Are? <ul style="list-style-type: none"> Supports or violates our mission, vision, values, promise, mandates? Intersects or collides with our deeply held ways of working? Requires to get better, maintain status quo, lessen our distinctiveness? Proposed Criteria/Refinements/Questions? 					
	INTENTION	Capacity Question: Why Are We So Deeply Serious About This? <ul style="list-style-type: none"> Demonstrates how results and quality we expect of ourselves are met? Consistent with or contradicts our intentions, aspirations or expectations? Shows a clear link between evidence-based efforts, outputs & outcomes? Proposed Criteria/Refinements/Questions? 				
		INVITATION	Capacity Question: Who Will Go Deep With Us? <ul style="list-style-type: none"> Good or bad stakeholder appeal across demographic markers? Strengthens or weakens partnership and relationships? Demonstrates or denies diversity, equity and inclusion in design? Proposed Criteria/Refinements/Questions? 			
			INVESTMENT	Capacity Question: What Do We Need to Go Deeper? <ul style="list-style-type: none"> Within or beyond our capacity to execute succeed? Financially sensible, viable, profitable, unreasonable, unsustainable? Offers returns mattering to us, requires trade-offs, losing proposition? Proposed Criteria/Refinements/Questions? 		
IMPACT	Capacity Question: How Do We Deepen Our Impact? <ul style="list-style-type: none"> Do positive intended outcomes outweigh conceivable adverse impacts? Is sensitive to the needs of the target community? Enhances our brand and reputation? Proposed Criteria/Refinements/Questions? 					
	TOTALS NOTES: BOARD'S TOTAL SCORE					

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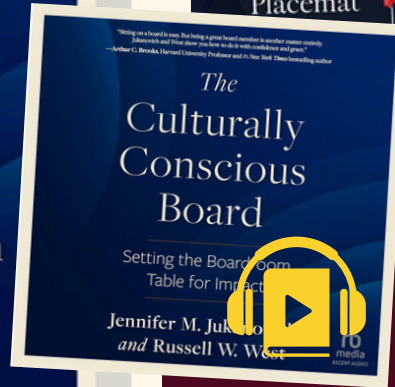
*David LaPiana, *The Nonprofit Strategy Revolution* 2021, (Adapted by R. West, 2024)

The Culturally Conscious Board

Setting the Boardroom Table for Impact

Jennifer M. Jukanovich
and Russell W. West

SCAN
ME



Let's Start a Conversation.

Check Out Our Growing Resource Shelf, Designed to Help Your Board Engage Deeper Conversations.

Go To: CulturallyConsciousBoard.com



ANY QUESTIONS?

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