



*Nonprofit*

**STRATEGIC PLANNING TRAINING**

*Montana Nonprofit Association Members*



**PLANNING SCHOOL**



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# Nonprofit

## STRATEGIC PLANNING TRAINING

Learn the process + **build** a Strategic Action Plan.

*Need help with strategic planning?*

It's time to **shape your future**. Envision the next chapter. Prepare for what's to come. **You need the CLARITY, FOCUS, and INSPIRATION** a strategic plan can provide.

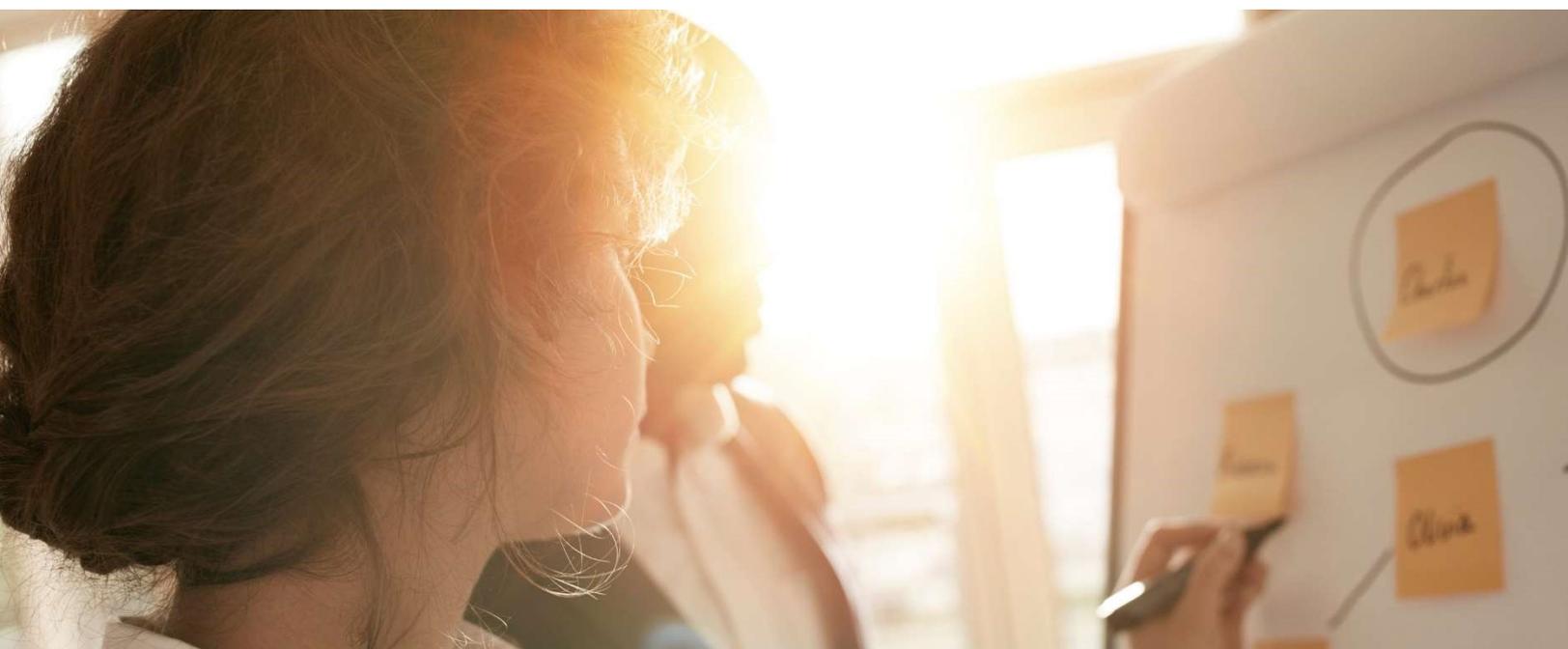
We live in a time of complexity and uncertainty, and **leaders can no longer only** do strategic planning when they have the time or the money to bring in an outside facilitator.

You must be responsive and adaptable. **That means CONTEMPORARY STRATEGIC PLANNING approaches are now part of a leader's BASELINE skill set.** We are NOT talking about generic strategic acumen.

We are talking about **PROCESS knowledge, skill, and expertise.**

- **STOP settling** for inadequate planning meetings.
- **STOP relying** on others when you can learn it yourself.
- ✓ **START taking control** of the future you are creating.

[**READ MORE** about why you should learn instead of hiring a consultant.]



# About the Training

A 10-week virtual program that teaches you **contemporary approaches to nonprofit strategic planning** as you **build your Strategic Action Plan**. [[READ MORE](#): What is a Strategic ACTION Plan?]

## LEARN IT

So you can plan when and how you need.

The old way of planning DOESN'T **FIT your style or your reality**. Now, you must plan **more often** and **adapt** your plans to unforeseen circumstances. 🛑 **Stop depending** on expensive outsiders to lead you through mechanical and rigid planning retreats. ✅ Instead, **learn CONTEMPORARY STRATEGIC PLANNING**.

## DO IT

So you can get moving toward your future.

You need a strategic plan IN HAND, ready to **execute**. But you don't ONLY need it done - you need it **done RIGHT so it doesn't sit on a shelf**. Learn a **reliable and effective approach** to strategic planning, and practice by **building a plan as you go**. 🔥 You'll leave with a **Strategic Action Plan that serves as a TOOL THAT YOU USE** instead of a document you read.

## WHAT YOU WILL LEARN:

- ✓ a RELIABLE and REPEATABLE process that allows you to MEET YOUR GOALS while operating amidst complexity
- ✓ how to get the most from ALL FOUR phases of strategic planning
- ✓ best practices for organizing PLANNING TEAMS
- ✓ how to ENGAGE STAKEHOLDERS so your staff, partners, and other key stakeholders are contributors to the process and the end result
- ✓ a process to EVALUATE THE CURRENT STATE of your business, assess its READINESS for planning, and determine an appropriate planning SCOPE
- ✓ how to create a vision and goals that can WITHSTAND uncertainty and change
- ✓ how to ROLL OUT and EXECUTE a strategic plan, and how to ADAPT your plan when things change
- ✓ how to make a TOOL THAT YOU USE instead of a document that you read
- ✓ planning ADAPTATIONS specific to nonprofits

 EXPERT INSTRUCTORS COHORT LEARNING LEARN-APPLY FORMAT SUBSTANTIAL TOOLKIT SECTOR ADAPTATIONS

## WHO IS THIS FOR?

**Do you relate?** If you've had these thoughts or share these needs, this training might be perfect for you.

- ✓ Mechanical and rigid **TRADITIONAL APPROACHES to strategic planning DON'T FIT your style or your reality.** You want something that gives you **STRUCTURE, ADAPTABILITY,** and purposeful **ACTION.**
- ✓ You fancy yourself to be a bit strategic and savvy already, but **there's SOMETHING MISSING from your toolkit** you can't quite put your finger on. Sometimes planning works. Sometimes it doesn't. You want **CONFIDENCE that your approach to strategic planning will deliver.**
- ✓ You are interested in making **contemporary strategic planning a SKILLSET YOU HAVE** instead of strategic planning being an **ACTIVITY YOU HIRE** someone to do for you.
- ✓ **You are purpose-driven.** You are worried that your organization's **IMPACT** might be **COMPROMISED** without a strategic plan.
- ✓ You want to **TAKE CARE** of your **TEAM.** They are regularly **OVERWHELMED** and need **FOCUS** and **INSPIRATION.** They want **CLEAR DIRECTION** and **SHARED PRIORITIES** that they support.
- ✓ You want your leadership to be **EFFECTIVE** and your guidance to create **RESULTS.** And, **you want a plan your whole team is PROUD of.**



## ABOUT PLANNING SCHOOL

### Why are we here?

Our purpose is to **make it easier for you to have the biggest impact possible**. We do this by teaching **the #1 skill for effecting change: strategic planning** to the people working on **the greatest challenges** of our time.

We're here to shift the paradigm that useful strategic planning is part magic and part suit jackets and replace it with the understanding that **strategic planning is a tool anyone can learn to wield**.

We're here to help everyday changemakers do the most important work there is to do.

### Where did we come from?

Planning School was born from experience, disruption, and a desire to support meaningful work. Liz Moore, our founder, spent nearly a decade facilitating and consulting on strategic planning nationwide. She's consulted with over a thousand leaders at some of the most complex resource management agencies and facilitated small nonprofits, entrepreneurs, and businesses through strategic processes.

But her love was always for teaching, breaking down the illusion of mystery in planning and making it accessible, repeatable, and effective amidst constant uncertainty. When the pandemic hit and her travel stopped, she seized the disruption to create the first version of our Strategic Planning Course. Krista Guardino, our lead instructor, and Liz previously worked together and hit it off immediately. Krista is one of the best instructors and facilitators around, and she's helped create our programming and our flagship course. Now, a couple of years later, they've teamed up to bring you Planning School.

## MEET YOUR INSTRUCTORS



**Liz Moore** | [Founder + Instructor](#)

I love this work! On the surface, it looks like helping leaders solve complex problems, build strong teams, and execute nimble strategies. Underneath, it's really about delivering experiences that light up people's courage and turn on their connection to purpose. I've spent a decade as a consultant and trainer specializing in strategic planning, change management, and leadership coaching. Going back over twenty years, I've been behind the scenes, facilitating organizations and individuals to define their purpose and professional identity. At this point, I'm a strategic thinking expert, master facilitator, skilled teacher, and coach. *Read more about Liz [here](#).*



**Krista Guardino** | [Lead Instructor](#)

I refuse to accept the adage, "That's just how things are" and believe through creativity and collaboration, any problem can be solved and every system can be streamlined. I specialize in questioning assumptions to promote innovation and complex problem-solving. I've worked with people around the country, facilitating the development of strategic plans. My experience with complex organizations is with Silicon Valley tech start-ups. I led marketing for an educational company disrupting the traditional textbook industry, and I'm a fan of people and organizations who are questioning the status quo and doing hard work to change systems. *Read more about Krista [here](#).*



## What people are saying.

"Finally! A training that provides a framework for understanding how to do TRUE strategic planning effectively! We used to struggle with our 'planning' meetings but now we know what was missing and how to do it in a way that creates alignment, clarity, and action!"

"I hate to admit it, but our plans used to be long, over-written, overly detailed, and not very useful. My team needed a shared vision for our future and agreement about priorities. Our old approach just didn't work. Now, we understand what was missing and how to create strategic action! It's exciting to see the progress we're making already!"

"I had never been involved in strategic planning but kept thinking that it might be exactly what we needed to get more focused and be able to have more impact with our services. I needed help to figure out where to start and how to go about strategic planning. Then we found Planning School! They made it so easy and fun! Now, we will always have a strategic plan!"

"The idea of strategic planning sounded good but also seemed totally overwhelming. And, some of my team members had bad experiences with planning so they weren't exactly excited about the idea. I needed help with strategic planning but I didn't want to have to rely on a contractor who didn't know our nonprofit to lead the process. I'm so grateful I found Planning School! They gave me the tools, skills, and confidence to do planning in-house, and now we have a plan we are actually executing!"

# Common Questions + Concerns

*Below are common concerns and questions we get, so we thought we'd preemptively share our responses in case you have them, too.*

## **What's the commitment?**

10 weeks. Weekly, 60-minute classes (recorded in case you miss) plus 1-3 hours of homework per week, and 3-4 onsite staff and/or stakeholder meetings over the course of the program. That's an average of 2-4 hours per week. We won't pretend it's not a time commitment. Discovering what's truly important for your organization always requires hard work. Building a skillset you'll use throughout your career takes time. It also offers unprecedented rewards for clarity, inspiration, and accomplishment. This program is only for people willing (not "able," no one has a bunch of free time to throw at this) to put in the time and the work. The kicker? You'll learn, really learn, how to do strategic planning.

## **The timing isn't right.**

You don't have time because you are overwhelmed. You are overwhelmed because we've been on a trajectory of increasing complexity and uncertainty. Most teams struggle to figure out what to STOP doing so they can focus on what's most important. So, here you are, doing too much. In our experience, the only way out of the continuously-reacting mode is to be more strategic. So, find a solution that works for your organization, or keep treading water. And, maybe the timing is NOT right. Sometimes, you need to "let the earthquake stop" to see where all the shelves fall before you figure out how to pick everything up and move forward. But remember: the uncertainty and turmoil we are facing are not likely to diminish in the months or years to come. Have a heart-to-heart with your hesitation (and maybe with an instructor), and make sure waiting is truly the best choice. (If you've read this far, we have a hunch it's time.)

## **My team requires an outside facilitator.**

If your team is dysfunctional, we recommend you start working on team function BEFORE you begin strategic planning. A truly dysfunctional team will implode a planning process. As leaders, isn't it our responsibility to work with team members to be productive and not destructive? Letting bad behavior be the reason you can't do proper strategic planning isn't acceptable. Instead, let it be a clear indicator of what you need to do FIRST: team development or working with individuals on their performance. And

another point: if you need a "big stick" to get this type of work done and the "big stick" leaves at the end of the process, how do you expect execution will go? We've been the "big sticks" for a long time and deeply believe that an internally led process results in an EXECUTED plan (instead of a written one). And, of course, there ARE TIMES when complexity requires an outside consultant. We can help you decide what's best for your situation.

## **Does the training include sector-specific education?**

While we offer sector-specific training, this cohort is specifically for nonprofits and will include planning adaptations relevant to the nonprofit sector.

## **Can I see a plan?**

Possibly. We are very protective of our client's confidentiality, and we do have permission to share plans in certain scenarios. It requires that you set up a time to [chat](#) with us about the program, and we can determine if there's a plan we can share. And everyone enrolled in the courses gets to see a variety of finished plans.

## **Can I do a private cohort?**

Absolutely! Maybe you're a subsidiary of a global nonprofit and want to have a cohort with a few of your teams. Maybe you're a nonprofit and want a cohort with your partner organizations. Or, maybe you are part of a professional group and would like to take the course with them. We require a minimum of ten students to join a private cohort; we can take up to 15. Whatever your interest, let us know. We'll contact you to [schedule a time](#) to discuss your needs.

## **How much does it cost?**

All of our full programs are priced to be less than the cost of an external strategic planning expert doing the process for you. Pricing depends on the size of your organization, and we offer early-bird discounts, nonprofit pricing, discounts for members of certain professional associations, and situational slide scales. Schedule a [chat](#) with an instructor who can provide pricing for your specific situation. FYI, when you reach out, we won't spam you. We'll just answer your questions. **Continue to the next page for pricing.**

# Investment

Nonprofit Strategic Planning Training Tuition - ~~\$3,400~~

**\$1500**

Montana Nonprofit  
Association Members

**April 2024 Cohorts**

If your strategic plan is for **less than** 20 people, having just one person from your team take the training works great! When your plan is for teams of this size or smaller, one person can reasonably manage the workload. You are welcome to enroll more than one person from your team, but it is not required.

*NOTE: If your strategic plan is for **more than 20 people** or large organizations, schedule a time to chat with us. The facilitator's training may be a better fit for larger organizations, or we can advise you on managing strategic planning for your circumstances. Email us at [chat@gotoplanningschool.com](mailto:chat@gotoplanningschool.com) to discuss.*

## REGISTRATION REQUIREMENTS

- Payment is required **at registration**.
- **You must speak to an instructor before registering** for the program. For a complimentary, no-obligation conversation with an instructor, email us at [chat@gotoplanningschool.com](mailto:chat@gotoplanningschool.com).

**Not sure which enrollment option is right for you?** Talk to an instructor (not a salesperson) to discuss your specific needs. Email us at [chat@gotoplanningschool.com](mailto:chat@gotoplanningschool.com).

## BUSINESS DETAILS

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EIN: 83-2783875

DUNS: 117118126

# STRATEGIC PLANNING TRAINING *Comparison*

Program Details	Nonprofit Strategic Planning Training	Strategic Planning Facilitator's Training
<b>Type and Length of Program</b>	Live, virtual cohort. 10 weeks.	Live, virtual cohort. 20 weeks.
Learn what strategic planning is, how it <b>differs from</b> operational planning, and the <b>best times</b> to do planning.	✓	✓
Learn <b>ALL FOUR PHASES</b> of strategic planning and <b>best practices</b> for each.	✓	✓
Develop <b>advanced</b> strategic planning skills and knowledge.	✗	✓
Learn how to <b>ENGAGE STAFF and stakeholders</b> in the planning process.	✓	✓
Learn <b>sector-specific planning adaptations</b> for nonprofits, for-profits, and public sector agencies.	✓	✓
Learn <b>advanced strategic planning</b> processes and skills for complex organizations.	✗	✓
Learn to <b>FACILITATE the process</b> + lead a Planning Team; earn your <b>Strategic Planning Facilitator Certificate</b> .	✗	✓
Learn how to leverage planning to <b>develop high-performing teams</b> (and interrupt unhealthy dynamics).	✗	✓
<b>BUILD YOUR Strategic Action Plan</b>	✓	✓
Be in a <b>COHORT</b> with like-minded and/or like-industry professionals.	✓	✓
<b>Expert instruction</b> from strategic planning <b>consultants</b> .	✓	✓
Advice for <b>your organization's</b> unique needs and complexities in class and office hours.	✓	✓
<b>One-on-one coaching</b> with a strategic planning expert.	✗	✓
Permanent access to your <b>online toolkit and training resources*</b> .	✓	✓
<b>Strategic Planning Workbook</b> (electronic and physical).	✓	✓
<b>Investment</b>	<b>\$1500</b> Montana Nonprofit Association Members <b>April 2024 Cohorts</b>	<del>\$3400 USD</del> <b>\$6250 USD</b>

As long as we are in business, you can access your program in our online learning platform! While there's no guarantee, we plan on sticking around for a long time! 😊 You can download materials, and you'll receive a Strategic Planning Workbook (in electronic and physical formats).