

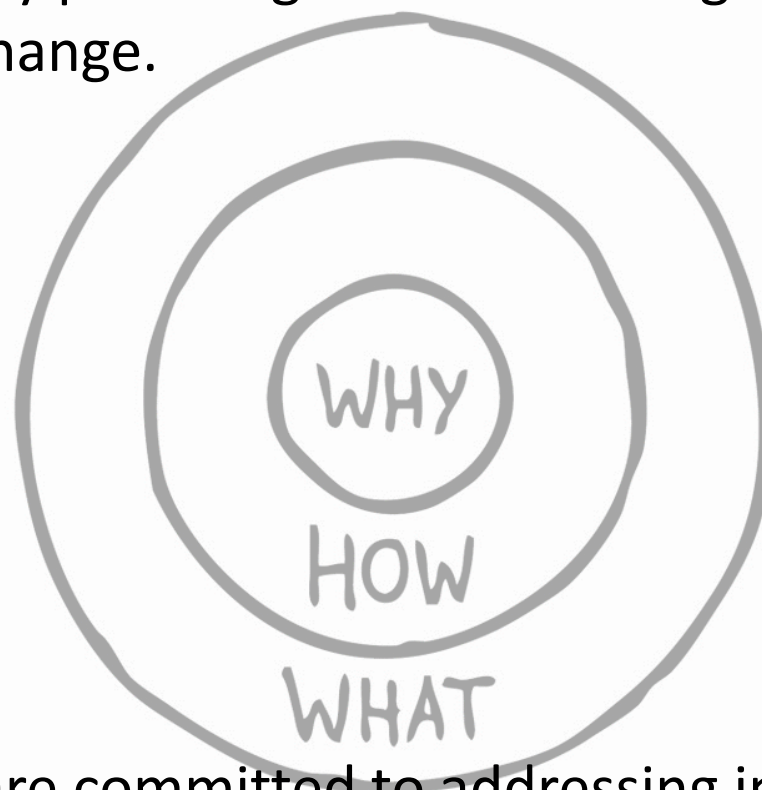
Courageous Conversations: Infusing DEI into Your Strategic Planning & Board Culture

Facilitator: Liz Wooten-Reschke, President/CEO, Connect For More




**ENGAGED LEADERSHIP. EMPOWERED PHILANTHROPY.
MISSION ACCOMPLISHED.**

OUR BIG WHY: Connect For More impacts lives and organizations to equip our community to help others and society by providing confident thought leadership and fostering collaboration for positive change.



OUR EVOLVING WHY: We are committed to addressing inclusion & equity in all strategic work, empowering more than “just” diversity of thought and moving beyond tokenism for all nonprofit leadership, and continuing to create space to navigate tough conversations together.



Integrity is choosing courage over comfort; choosing what is right over what is fun, fast or easy; and choosing to practice our values rather than simply professing them.



Testing Our Tech

- Raise your hand (virtual or physical) if you're looking forward to the Florida fall weather.
- Raise your hand (virtual or physical) if you've participated in a strategic planning process with your organization.
- Using the chat function, describe in "two words" your experience.
- POLL: How would you rate your expertise level with strategic planning (beginner, intermediate, expert)?



- ✓ Disclaimer
- ✓ Holding Sp
- ✓ Conflict Tra
- ✓ Words Mat
- ✓ Permission

PERMISSION SLIP POST-IT NOTE

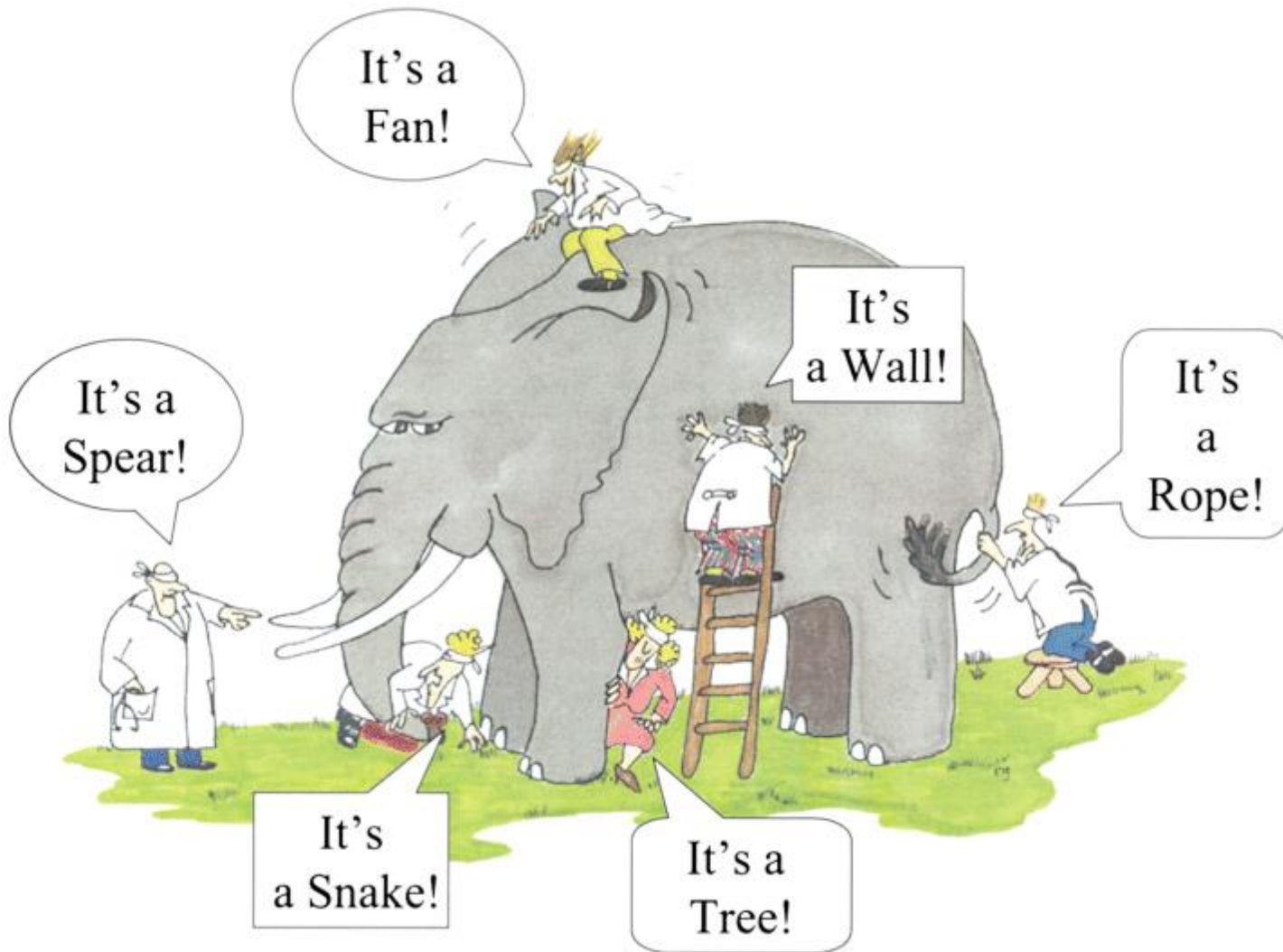
I give myself permission to feel...
I give myself permission to do...
I give myself permission to not...



Our Strategic Planning Philosophy

- * Strategic planning is a **team sport**
- * Plans are **living, breathing documents** that go with you everywhere
- * Given the ever-changing climate, plans between **1-3 years**
- * **Action orientation** with plan specifics, role assignments, timeline and measured success
- * Staff & other stakeholder **input is important** but the **board must own the plan** creation and be “bought-in”





“Plans are useless but planning is everything.”

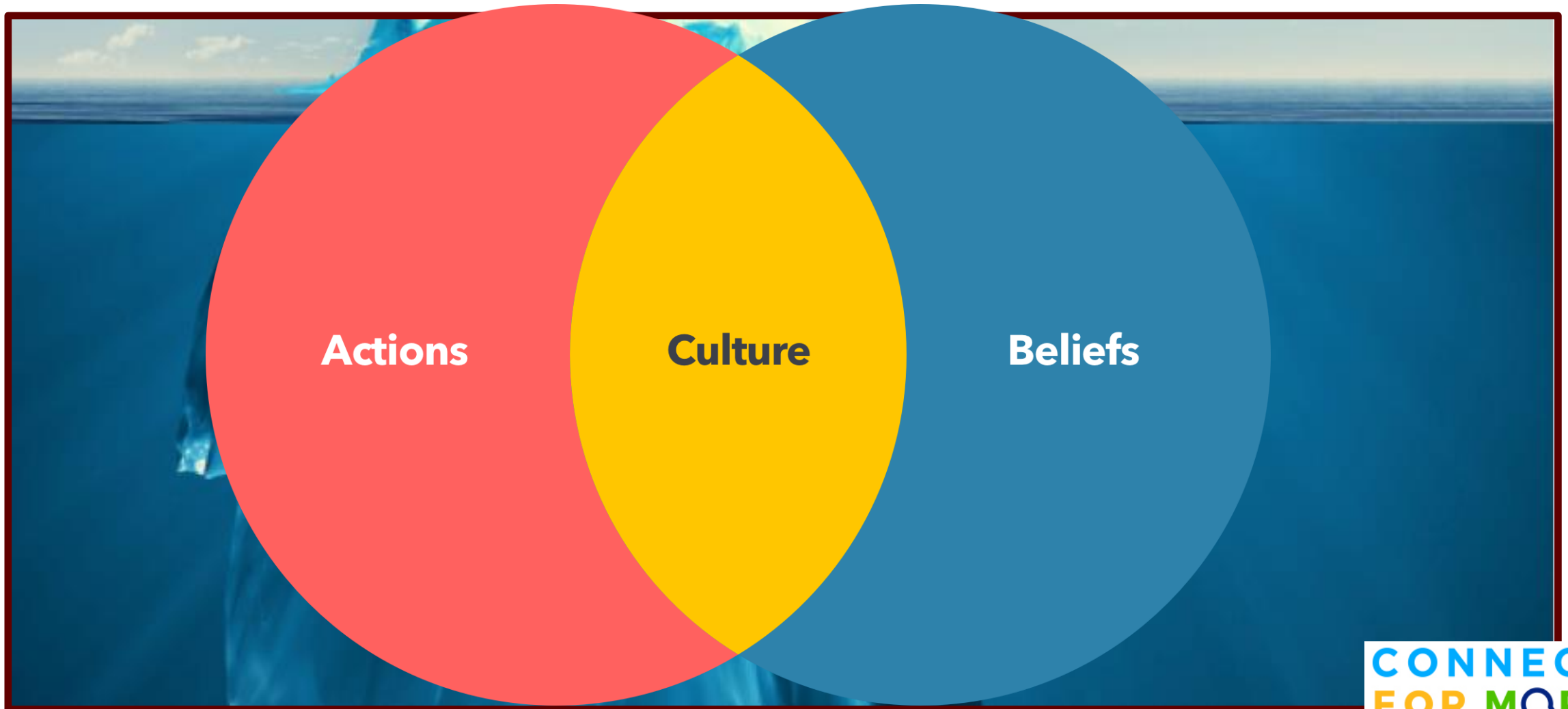
– Dwight Eisenhower

“A great strategy conversation should breathe life into the organization and it’s stakeholders.”

– Joan Garry, *Nonprofits Are Messy*



Culture is...



What is your culture?

How do you promote....

Trust?

Information
Sharing?

Team
work?

Dialogue?

Culture of Inquiry: Healthy Debate in the Boardroom, Nancy R. Axelrod, 2007



Strategic Plan Deep-Dive: FLACDC Plan 2019-21

- **Goal 1:** Provide access to a robust continuum of programs and services that will increase program effectiveness, financial viability and understanding of the work of our member organizations.
- **Goal 2:** Make Membership and active participation in the Alliance a valued, essential component of community economic development organization success.
- **Goal 3:** Develop an earned income strategy that creates a steady source of discretionary funding to support our strategic plan.
- **Goal 4:** Have a strong, capable, dedicated, diverse Board of Directors and staff and efficient infrastructure.

Strategic Plan Deep-Dive: FLACDC Plan 2019-21

1. What is our common understanding of what we mean by this goal?
2. What does “done” look like?
3. What other information do we need to know?
4. How will we measure, monitor and communicate success with our board, staff, development committee and funders?

Strategic Plan Deep-Dive: FLACDC Plan 2019-21

- **SPECIFIC:** What exact goal(s) do we wish to accomplish?
- **MEASURABLE:** How will we measure our progress & success?
- **ACHIEVABLE:** What skills/help will we need to reach our goal(s)?
- **RELEVANT:** In what ways is our goal worthwhile?
- **TIMELY:** When will you complete your goal and follow-up?
- ***INCLUSIVE:** How can we eliminate gaps across race, class, gender and other groups?
- ***EQUITABLE:** How can we prioritize those with the least access?

Strategic Planning Inclusion

- Who are our important stakeholders?
- What are our current client/community needs? How do we know?
- In what ways are they/could they be evolving? How are we cultivating a deeper understanding of the stakeholders that we serve?
- Are we ever at risk of making decisions without fully understanding how these decisions may affect those we serve?
- Who else do we need to have informing our decisions?



Rumble Tools for Courageous Conversations

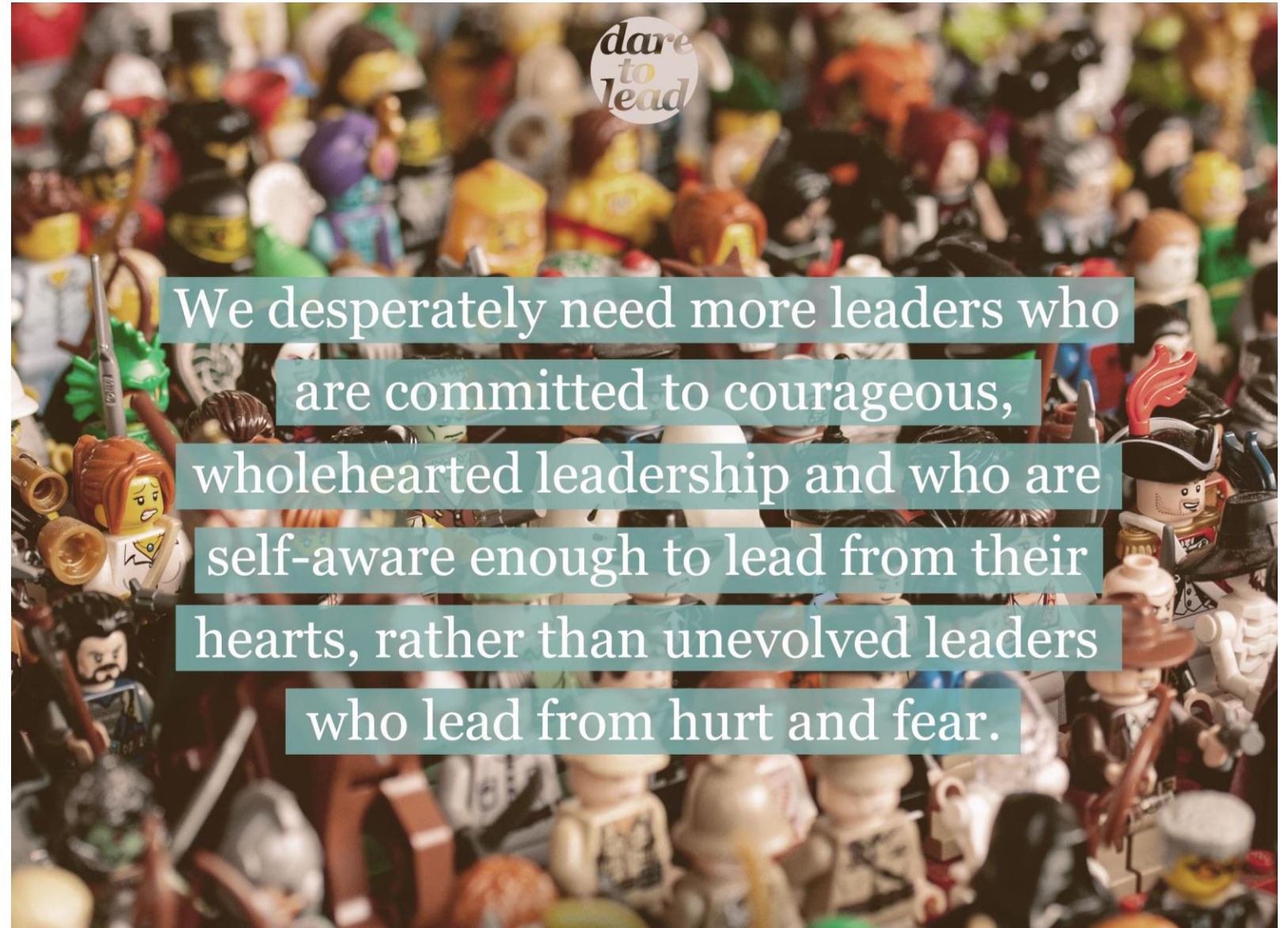
- The story I'm making up is...
- I'm curious about...
- Help me understand...
- Tell me more.
- That's not my experience...
- I'm wondering...
- Walk me through...
- Tell me why this doesn't fit/work for you.
- I'm working from these assumptions – what about you?
- What problem(s) are we trying to solve?
- What result(s) do we hope to have?

Adapted from Dare to Lead, The Rumble Process, Dr. Brene Brown

Values
Rumble
Trust
Vulnerable
Strong
Rise
Braving
Heart
Live



What's one thing we discussed today that you can do tomorrow to be a more courageous leader tomorrow?



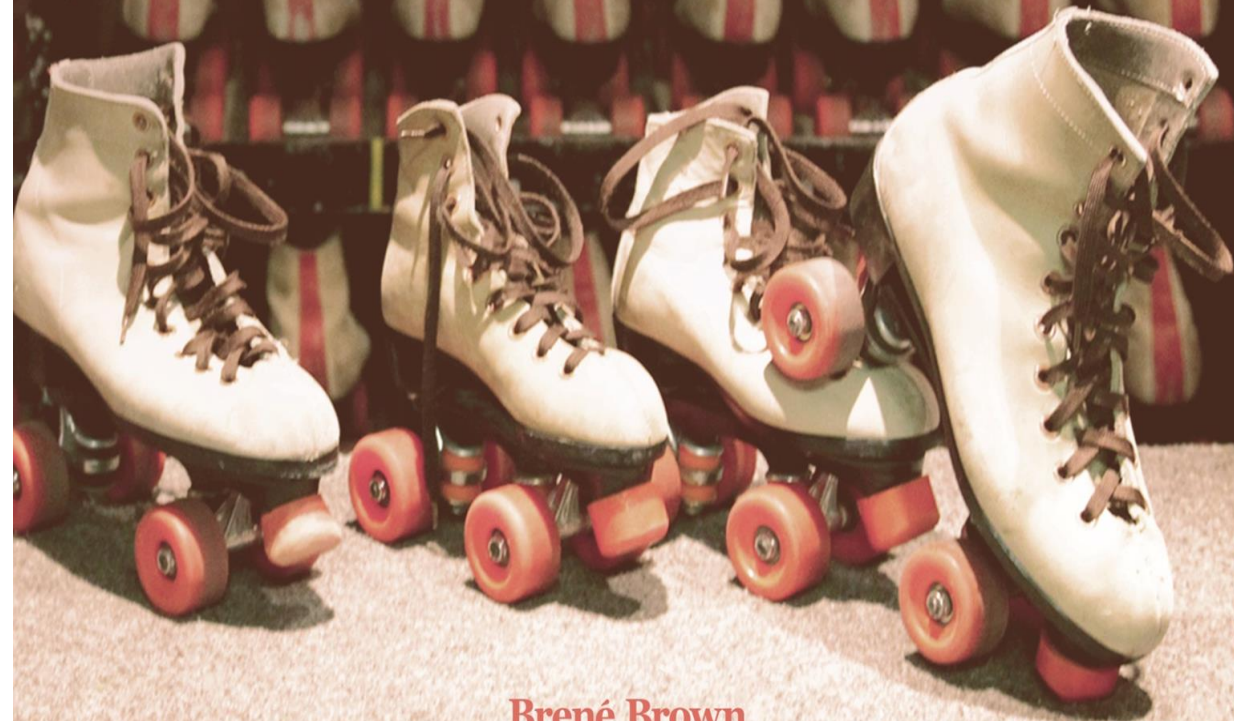
Thank You!

CONNECT FOR MORE

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IMPERFECTIONS ARE NOT INADEQUACIES;
*they are reminders
that we're all in
this together.*



Brené Brown