



Helping Organizations Realize Their Full Potential

Our Approach to Strategic Planning

Ross Strategic has an outstanding track record of helping foundations, non-profits, and local, state, and federal agencies chart their strategic direction. We have experience in strategic planning in all scopes and scales. We are active listeners and facilitators, developers of a results-driven planning process, and experts in information synthesis. Strategy truly suffuses everything we do.

Every strategic plan is different, but our strategic planning process always contain core elements that are tailored to each client's budget, timeline, constraints and aspirations. Our assistance ranges from facilitating one-day highly interactive strategic retreats to developing comprehensive, actionable strategic plans.

Collaboration is critical to a successful strategic planning process and we

draw from many different people and perspectives both inside and outside of organizations. We have deep content knowledge and are experts at assessing the landscape in which organizations operate. We also help clients think about the organizational structure and management systems that are necessary to get where they want to go.

We believe that every strategic planning process should focus on action and implementation from the start. Change does not have to wait until the planning process is over. We work with clients to implement change the moment the need and path for change are clear. We combine our experience in structured learning with our expertise in stakeholder process development to produce a unique and effective 'change while you plan' strategic planning approach.



Our staff are system thinkers, public policy experts, researchers, and planners with decades of experience in helping organizations chart their strategic direction.

SERVICES

Strategy

Research and Analysis

Design and Implementation

Evaluation and Learning

Collaborative Processes

Information Management

Building Blocks of Strategic Planning

UNDERSTAND THE LANDSCAPE AND SET A DIRECTION

- Analyze the strategic environment, both opportunities and threats
- Assess organizational strengths and weaknesses
- Identify areas of greatest value and unique contribution
- Create and communicate vision, mission, and theory of change

GET STARTED AND COURSE-CORRECT ALONG THE WAY

- Identify implementation actions, targets, and timelines
- Align organizational capacity with activities
- Create channels for transparency, accountability, and feedback loops
- Assess progress and adapt approach

AFFIRM DESTINATION AND GET ORGANIZED

- Establish planning team
- Assess strategic needs and clarify desired outcomes
- Identify individuals and organizations to engage for strategic insights
- Affirm project approach, milestones, and products

CHART A PATH OF GOALS AND STRATEGIES

- Brainstorm creative solutions with staff, partners, and stakeholders
- Synthesize ideas into potential goals and strategies
- Prioritize goals and strategies to align with mission
- Share and refine strategic direction with partners and stakeholders
- Clearly and broadly communicate strategic plan

Techniques That We Employ

Strengths, weakness, opportunities, and threats analysis

Scenario planning

“Game changers” analysis

Creative brainstorming, grouping, and prioritization

Constraint-driven problem solving

Small group strategy mapping

Stakeholder interviews and surveys

SELECT CLIENTS

The University of Texas at Austin Energy Institute

The Meadows Center for Water and the Environment at Texas State University

University of Minnesota Energy Transition Lab

Hill Country Alliance

Texas Hill Country Conservation Network

Oregon Department of Energy

Prince William County Service Authority

McKnight Foundation

The Cynthia and George Mitchell Foundation

Alliance for Water Efficiency

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FOR MORE INFORMATION

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