

**Topic:** Strategic Planning

**List Serve Question:** What has your coalition done for Strategic Planning, and if you have used a specific consultant, who did you use?

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| State | Consultant  Used | Additional details |
| Alaska  Ann Rauch FVPSA Admin | $8,905, 391 | For both domestic and sexual violence programs |
| Idaho | Jara Dean Coffey  (Luminere) | We went through a theory of change of process beginning in 2014 and the board voted on it in 2015, field tested it, and board voted again in 2016 (after some opposition).  We had a working group of 5 staff, 5 board (with representation from urban and rural and tribal programs and external partners), and 2 external partners and worked closely with a consultant Jara Dean Coffey from Oakland (Luminere).  It was a deep investment that transformed our organization.  We also worked on an operational language document and did a tour around the state to have programs learn about it through experiential activities. This is an internal document, and we shared it with program members and organizational members in small sections (small cards).  We also had a decision screen that we used for any decision (and still go back to) the first few years.  Some members loved it, some were fearful.  We have gained 100 fold of anything we could describe as a loss.  It’s also important to make it a living document and integrate it into everything, such as my contract with the board is linked to the theory of change, board reports are organized around the theory of change, our onboarding, our conferences, etc.  All our grant applications align with the theory of change, etc.  The lessons learned – we had people on the initial working group who we identified as the most open, ready, and willing to transformation and had the strongest muscle on risk taking, imagining, and being bold.  It was also critical to have a richly diverse group who were influencers. The positive side is that we could go bigger than if we had a group across the spectrum of enthusiasm for this kind of change, and it took a while for all staff and board to come along even though we shared everything along the way.  We used a graphic designer for each design meeting.   We had some staff and board peel off once we started field testing (the first year) and living into the theory of change.  Even though we were always sad for anyone to opt out, I would still strongly recommend going with the boldest group. |
| Vermont | Luminere | Our approach mirrors WSCADV’s.  We are one year into our Theory of Change process and deeply engaged in testing our Theory of Change.  We used Luminere, a TOC group that works out of San Francisco.  And I echo Judy is saying that we have found the TOC to be a transformative structure.  We convened a core team from our staff and board who worked with Luminaire to frame out the various elements of the TOC, then we did the real work to fill in the frame with a group comprised of our staff and contractors, board of directors (who, are the ED’s of our membership), a few advocates from member organizations with whom we have worked on statewide projects, and various and sundry partners and stakeholders. Because our TOC is being tested it is embargoed for 2019. Some member of our board (who struggle to occupy the board role as opposed to their membership role) really hated it all. They expressed feeling blind-sided by the process and struggled to find themselves within the emergent draft.  I offer this knowing that we worked with this group for two years prior, introducing the concept of TOC, sharing information about the process, and preparing them for the moment when we would be asking them for input. If I had to do it again, I would have done the work we are doing now to change the composition of our board years ago. We reconvened the staff and the board last year to finalize the draft, which they did with few modifications.  I’m pleased with the outcome but I wish our board had been in a better place.   And the TOC itself serves us well in all the ways Judy described. |
| Washington | Michelle Gislason  CAStrong Field Project | WSCADV created a Theory of Change instead of re-doing our strategic plan. This took about two years start to finish, and was an in-depth process, but the outcome has been transformative for our coalition – board, staff, membership. The Theory of Change is scaffolding how WSCADV is making the [3 pivots](https://www.movetoendviolence.org/wp-content/uploads/2015/05/building_movement_conversations_vision.pdf) necessary for our movement (identified by Move To End Violence: from reactive to pro-active, from silos to interconnection, from only social services to combining that with social change). We are now more clearly addressing root causes of violence with cornerstones of race equity, economic justice, and gender and reproductive liberation, along with working in relationship. Here is the visual representation and FAQ:<https://wscadv.org/strategic-plan-annual-report/>. An example of this is a major shift in our legislative advocacy from more criminal bills to options for formerly incarcerated people (including survivors) to be able to clear their records in certain circumstances.  We interviewed a few “Theory of Change” consultants but none of them really got us, so we hired Michelle Gislason whom some of you know from the CA Strong Field project and consulting with DV/SA orgs. She is now a solo practitioner in Seattle. At her direction, we formed a Board/staff committee with rural and urban membership representation. Board members were responsible for taking the Theory of Change back to their programs and getting feedback. We presented the final adopted version at our annual conference. My now-retired co-worker Tyra Lindquist and I headed up the process.  A few lessons learned: Speak/write in common language and don’t impose the vision. The written documents we struggled mightily with, and endlessly word-smithed, aren’t getting used at all, only the visual. We spent maybe $15K in cash outlays (consultant, visual artist – well worth it, meetings).  Something I didn’t anticipate: Our membership LOVES the Theory of Change, and so far, this has strengthened our relationships. What I saw as radical and somewhat woo-woo, they see as inspirational, relevant to life issues in their communities (especially rural economically struggling areas), and something that they can invite their supporters – including men – to play a role in. |
| Wisconsin | Yes | In Wisconsin, we developed a Theory of Social Change (attached) with the help of Karen TS and have now hired a strategic plan facilitator to operationalize it. Our planning is happening in June 2019. |

This information reported by Coalitions through the list serve in April 2019.