

MOTIVATE MONDAY

April 13, 2026



ROSS

THE ROSS COLLECTIVE



About Renee

Dr. Renee Rubin Ross guides leaders and organizations in strategic plans and governance processes that deepen social change, racial justice, stakeholder engagement and community strength. Director, CSUEB Nonprofit Management program. Author, *[Inclusive Strategic Planning for Nonprofits](#)*.

- ★ **[TheRossCollective.com](https://www.therosscollective.com)**
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- She/Her pronouns
- White
- Past or current clients include: Bike East Bay, Civicorps, East Oakland Collective, Feed Black Futures, La Cocina, Los Altos-Mountain View Community Foundation, Mission Bit, National VOAD, New Museum of Los Gatos, SOS Meals on Wheels, Yerba Buena Gardens Conservancy, Student Achievement Partners, Youth ALIVE!.

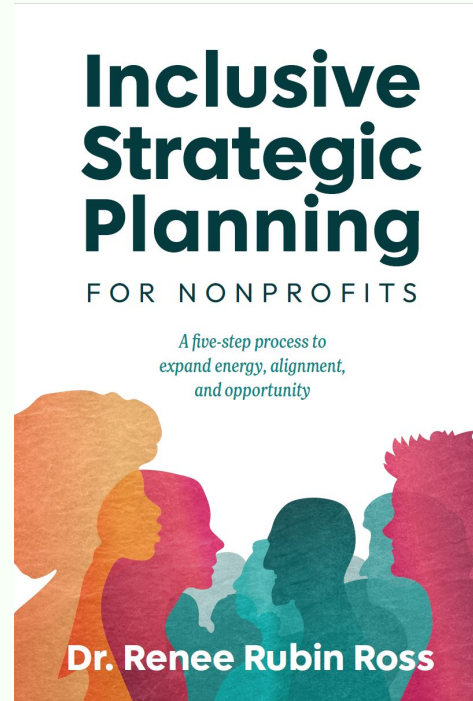
New book!

Based on our popular Nonprofit Strategic Planning course and the strategic planning processes that The Ross Collective leads with clients around the United States, *Inclusive Strategic Planning for Nonprofits: A five-step process to expand energy, alignment, and opportunity* explores our successful, well-tested process, which brings out the wisdom among organizational staff and boards, builds investment in planning, and creates clarity and focus.

Learn more: <https://www.therosscollective.com/book>

Buy on Amazon -

<https://www.amazon.com/dp/B0GLDRQ255>



Outcomes

By the end of this session, participants will ...

1

Reflect on a definition of **inclusion**, and learn a framework for designing an inclusive process and the benefits of that approach (Deciders, Builders, Sharers)

2

Reflect on **readiness for strategic planning**, using the matrix outlined in the book

3

Learn about the **five steps** of Inclusive Strategic Planning

1. Inclusion

What is *Inclusive* strategic planning?

Inclusion is a dynamic state where individuals and groups feel safe, respected, engaged, motivated, and valued for who they are and for their contributions to organizational and societal goals*.

*From *Equity: How to Design Organizations Where Everyone Thrives* by Minal Bopaiah

Why Inclusive strategic planning?

Research tells us that the most effective teams are those where team members create psychological safety, are doing work that is personally meaningful, and believe their work matters and creates change*.

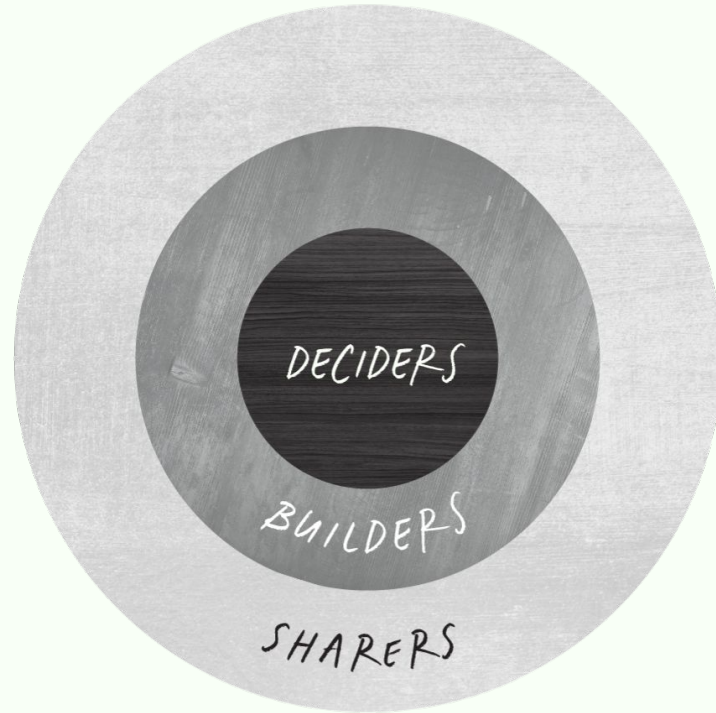
*<https://rework.withgoogle.com/intl/en/guides/understanding-team-effectiveness>

**How do *you* make strategic
planning inclusive?**

Making strategic planning inclusive - key ideas

- Use participatory methods
- Involve more people especially people who will be doing the work and are closer to the challenges the organization is working on
- Be transparent about decision-making and power
- Build in communication throughout the process

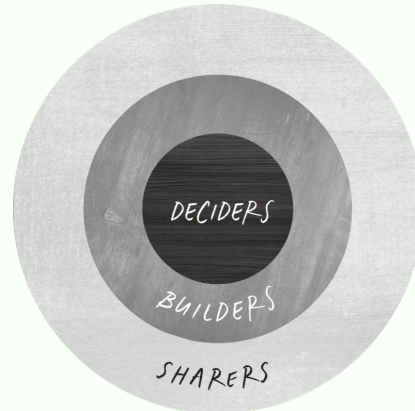
Inclusive Strategic Planning



Inclusive Strategic Planning

If your organization was to do strategic planning:

- Who would be the people in each category?
- What questions come up?



2. Readiness for planning

“Step 0”

Should we do strategic planning now?





Assess your **organization capacity**

Consider...

Do we have the **energy** and **motivation** to dig in to some big questions about our organization?

Given what is on our plate, **how important is planning?**



Assess your **financial stability**

Consider...

Is our organization in a place of financial **stability**?

To what extent do we have financial **resources** to invest in strategic planning?



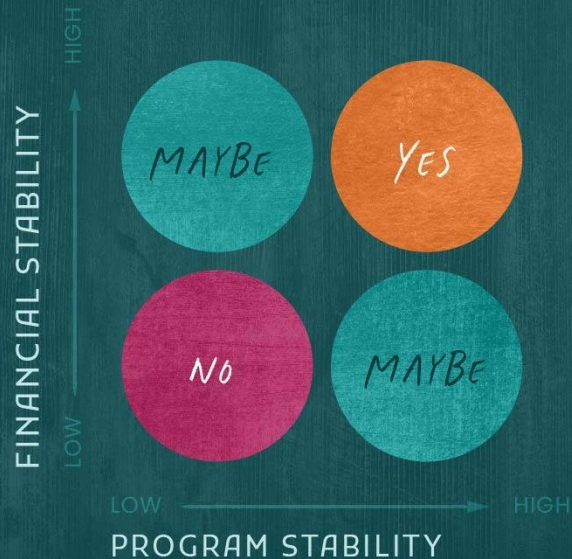
Assess your **programmatic stability** Consider...

How much have we **shifted** our program due to changes in the external environment?

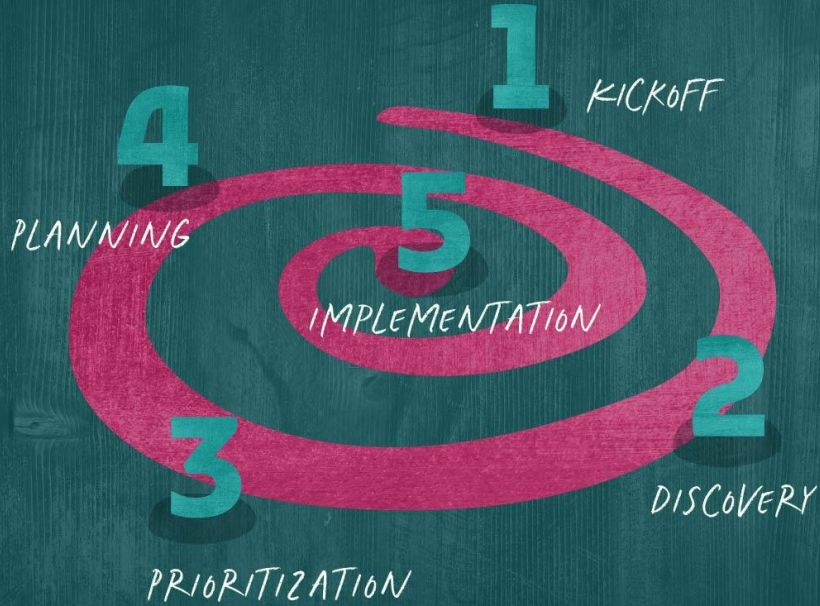
Are there **significant unknowns** about program delivery in the next few years?

Should we do strategic planning

SHOULD WE DO STRATEGIC PLANNING NOW?



Reflect on your organization.
Where does it fit on this table?
What questions do you have?



The five-step spiral

Closing

- What is one idea you're taking away from the session?
- What is exciting? Challenging?
- What is one implication for your work?
What is one next step you want to take?

To support this project

- Buy the book on Amazon [here](https://www.amazon.com/dp/B0GLDRO255) <https://www.amazon.com/dp/B0GLDRO255> or <https://www.therosscollective.com/nonprofit-strategic-planning-book> . Note the Kindle version is discounted through the mid April.
- Leave a 5-star review. :) More reviews will create more visibility for Inclusive Strategic Planning.

Questions & Discussion



CONTACT

Reach out to schedule a consult for strategic planning or training:
therosscollective.com/contact



NEWSLETTER

TheRossCollective.com/subscribe to receive our free Strategic Planning Template



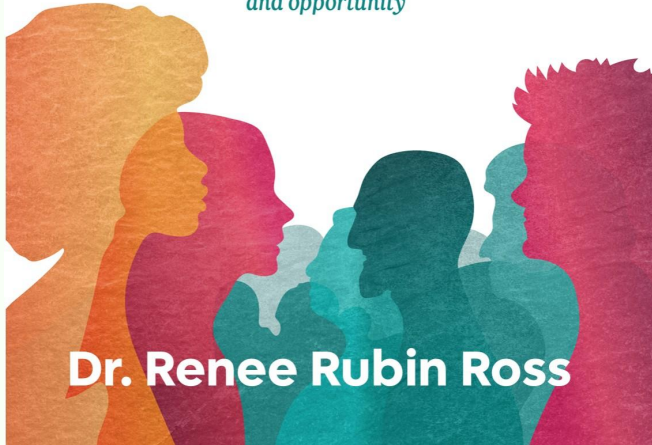
LINKEDIN

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Please send a personal note!

Inclusive Strategic Planning

FOR NONPROFITS

*A five-step process to
expand energy, alignment,
and opportunity*



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**Thank
You!!**

