

**Consultant Network Convening - Trends in Strategic Planning**  
**Anne Yurasek, Fio Partners**  
**December 14, 2022**  
**Zoom Chat Transcript**

**Introductions:**

From Marilyn Hoffman To Everyone:

Hi from southern NH. We do executive search for museums -- lately several clients in CT and Hartford area.

From Maren Brown (she/her) To Everyone:

I'm Maren Brown from Maren Brown Associates, and I specialize in arts management consulting. I haven't joined a session for a couple of years, so it is nice to be back!

From Gayle Gifford To Everyone:

Gayle Gifford, based out of Providence. Been around for a while.

From Jeff Sun To Everyone:

Hello everyone from Groton, MA. I have not participated in this network in a while, but am looking forward to it. My focus is in K-12 and Informal Educational Org (e.g., libraries and museums).

From Sarah Shrewsbury To Everyone:

Sarah Shrewsbury principal of Vineyard Consulting [www.vineyard-consulting.com](http://www.vineyard-consulting.com) Fundraising consulting to small and medium sized nonprofits

From Keri Humphries To Everyone:

Hello! This is Keri Humphries from Farnam Associates in New Haven, CT. We specialize in program development, strategic planning, and grant writing for non-profits statewide. This is my first session.

From Wendy Helmkamp To Everyone:

Hi all, I'm Wendy from Moon Shadow Consulting- I focus on strategic planning and organizational change with an equity lens and am also a DEI consultant

From Frank Abdale (he/him) To Everyone:

Frank Abdale - recurring - strategic planning, succession planning, board development, facilitation

From Diane Gordon To Everyone:

Diane Gordon, based in the Boston area. I specialize in strategic planning, evaluation, and outcome measurement, and have done work with the Hartford Foundation in the past. Thanks for organizing this session.

From Robert DeLisa To Everyone:

Bob DeLisa, Founder of Cooperative Systems. We provide managed IT services using Microsoft or Google platforms. Nice to be here!

From Howard Garval To Everyone:

Howard Garval, Leaders4FuturesLLC, focused on preparing the next generation of nonprofit leaders for senior and executive leadership positions.

From Jennifer Aniskovich To Everyone:

Hello from Branford, CT. Specialize in development, strategic planning, and governance, with some policy work (former lawyer).

From Samantha Williams To Everyone:

Sammi with The CMWP Foundation is an entrepreneurial support organization (ESO) providing targeted support for Black and brown business owners nationally. <https://cmwpnetworking.com/foundation/>. We are based in New Haven and serve Black and minority entrepreneurs across the state. We currently have a contract through CRCOG/DECD to work in the greater Hartford area. <https://cmwpnetworking.com/foundation/>

From Rebecca Tuttle To Everyone:

Rebecca Tuttle, Grant Write Now, LLC. Results Accountability Practitioner, Grants & Fund Development Consulting & Education.

From Karen Milton To Everyone:

Hello, Karen Greve Milton from Danosky & Associates where I am a senior consultant, specializing in strategic planning, Board governance, evaluation, ED searches and interim ED services. I am new to Danosky and consulting. Great to meet everyone.

From P. Todd Pickens To Everyone:

P. Todd Pickens, President of PTP & Associates in Hartford. The firm specializes in nonprofit management--strategic planning, organizational effectiveness, change management, and DEI issues. I have participated in workshops and seminars hosted by the Nonprofit Support Program for several years.

From Roxanne Pin To Everyone:

Roxie Pin, returning, but after a bit of a break, fundraising, estate planning working mostly with women.

From Thomas Phillips To Everyone:

Good afternoon everyone! Tom Phillips from TL Phillips Consulting. Have and continue to work with clients on not only developing strategic plans, but also companion implementation action plans. Interested in any info that I could use to enhance my work.

From Laura Roberts To Everyone:

Laura Roberts, planning consultant in Cambridge MA, I get to HFPG workshops when I can!

From Bob Serow To Everyone:

Hello. I'm Bob Serow, principal of RLS Consulting in the New Haven area. My focus with clients are in the broader areas of governance and fundraising, with much activity in strategic plans, fundraising plans, board retreats, and capital campaigns.

## **Comments:**

15:34:34 From Gayle Gifford To Everyone:

Have been turning down that type of one day limited planning process for many years now.

15:36:03 From Thomas Colligan To Everyone:

there is a balance between on input, building a sense of engagement with various levels of stakeholders and the urgency to set a course for the org.

15:38:03 From Wendy Helmkamp, she/her To Everyone:

I like the equitable and inclusive process you are describing. Very important!

15:39:16 From Maren Brown (she/her) To Everyone:

I've always seen strategic planning as a way to engage constituents, and to build their sense of commitment to the organization

15:39:58 From Gayle Gifford To Everyone:

Agree 100% Anne. The process is so critical and such an important tool in organizational strengthening.

15:41:10 From Howard Garval To Everyone:

I like the idea that you are building the muscle for strategic thinking and strategic planning as an ongoing activity for organizations that continues after your consultancy ends.

15:41:41 From Diane Gordon To Everyone:

I agree with all that you are saying. I'd add that it is equally important to help the organization figure out what to do with what they hear, and then how to incorporate input/ feedback and role for people with lived experience in ongoing decision making. This takes place after we have left usually, but we can help them develop a method for ongoing engagement.

15:42:00 From Maren Brown (she/her) To Everyone:

I'm inspired by the DEIA-focused strategic plan done by the California Arts Council:  
<https://arts.ca.gov/about/how-we-think/>

15:42:37 From Laura Roberts To Everyone:

I have found that the folks who are moving the organization's discussions forward on equity are a powerful set of change advocates.

15:45:25 From P. Todd Pickens To Everyone:

I believe that every strategy and tactic of an organization's strategic plan should be informed by DEI.

15:45:41 From Maren Brown (she/her) To Everyone:

Agreed Todd!

15:47:11 From Andréa Hawkins To Everyone:

The political landscape has made these convos tricky!

15:48:16 From Maren Brown (she/her) To Everyone:

I like thinking of creating two levels of each plan: internal and external.

15:49:12 From P. Todd Pickens To Everyone:

When it comes to change management, cultural change is the toughest type of change to get organizations to understand and embrace. But it can happen.

16:20:54 From Anne Yurasek @ Fio (she/hers) To Everyone:

Importance of implementation support as well!

16:26:58 From Gayle Gifford To Everyone:

Still a challenge... getting clients to truly embrace the idea that their partners/stakeholders are equally important pieces of creating the community change. Truly thinking the change makers include those beyond their own walls.

16:28:11 From Wendy Helmkamp, she/her To Everyone:

+1 Gayle and also remembering who they are actually accountable to at the end of the day.