




5 Things to Know About Board Engagement in the Strategic Planning Process



At Schunk Moreland Strategies, we believe that a strategic plan should never be created in a vacuum—or dropped in the lap of the board for rubber-stamp approval. Instead, it should be a shared journey that engages both board and staff as thought partners. When board members are meaningfully involved from the beginning, the result is not only a stronger strategic plan, but also a stronger, more unified organization.



1

Set the Stage with Shared Vision, Mission, and Values

Great strategy starts with a clear sense of identity and purpose. That's why we begin every planning process by co-creating or reaffirming the organization's vision, mission, and values. This is not a "wordsmithing" exercise. It's a powerful opportunity for the board to ask—and answer—big questions: Who are we? Why do we exist? What do we believe? What future are we building toward?

When board members participate in this foundational step, they help anchor the plan in a deep understanding of the organization's core purpose—and they're more likely to champion the final plan because they helped shape its roots.



2 Ground the Plan in Reality: Honest Assessment Through SWOT

Next, we invite board members to participate in a thorough SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis. While staff often bring programmatic and operational insight, board members contribute a different—and equally valuable—lens: external trends, community needs, policy shifts, and donor perspectives. Their vantage point helps surface issues that may be invisible internally and uncovers opportunities that could otherwise be missed.

This is also a chance for candid reflection. What's working well? Where are we falling short? What could we do differently? When boards are part of this honest inventory, they become stewards not just of vision, but of continuous improvement.



3 Strategy Is a Conversation— Not a Presentation

One of the hallmarks of the Schunk Moreland approach is engaging the board in the actual development of strategy—not just asking for approval at the end. We facilitate dynamic, generative conversations that focus on why a strategic direction matters and what might be getting in the way.

We often use prompts like:

- “What do we want to be true that isn’t true today?”
- “What’s stopping us?”
- “If we could only do three things over the next three years, what should they be?”

By stepping into this conversation, board members aren’t just observers—they’re co-creators. And they leave the process with a clear understanding of not just what the strategy says, but why it matters.

A background image showing a business meeting. Two people are seated at a wooden table. On the left, a woman with blonde hair, wearing a light blue shirt, has her hands clasped and is holding a pen. On the right, a man with dark skin, wearing a white shirt and a dark tie, is pointing with a pen at a document on the table. The document features a colorful bar chart. A laptop is visible on the left side of the table.

4 Clarify the Line Between Governance and Implementation

Board members play a vital role in reviewing and approving the framework of the plan—the goals and strategies that define the organization’s direction. But when it comes to execution, staff should take the lead. Implementation requires operational expertise, daily decision-making, and nimbleness—things that are best handled by those closest to the work.

Boards that understand this division of roles are more effective in their governance. They stay high-level, hold the organization accountable to its goals, and support the staff without micromanaging.



5

Keep the Plan Alive with Regular Board Updates

A strategic plan is only as powerful as its follow-through. That's why we encourage organizations to integrate the plan into regular board meetings—not as a bulky report, but as a living document. Regular updates keep the plan visible, track progress, and allow the board to serve as thought partners in real time when course correction is needed.

Some boards even dedicate one meeting per year to reviewing the full plan, identifying accomplishments, and recommitting to long-term priorities. These touchpoints build momentum and ensure the plan doesn't gather dust.



The Power of Partnership

At Schunk Moreland Strategies, we've facilitated over 60 strategic plans across sectors—and in every successful case, the board was not on the sidelines. They were in the conversation. They were visionaries, realists, challengers, and champions.

If you're a board member reading this: your voice matters. Your curiosity, your questions, and your commitment to your organization's mission are essential to the success of the strategy. And if you're a staff leader: invite your board to be partners early and often. You don't have to do this alone.

WHEN WE BRING THE RIGHT PEOPLE TO THE TABLE AT THE RIGHT TIME, STRATEGIC PLANNING BECOMES MORE THAN A PROCESS—IT BECOMES A CATALYST FOR TRANSFORMATION.



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