

**Five steps to planning for**

**2023**



The Ross Collective

# About Renee and The Ross Collective



*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. Dr. Ross also serves as Director of the CSUEB Nonprofit Management program.

[TheRossCollective.com](https://www.TheRossCollective.com)



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# Five steps to planning

STEP 1

**Get the right people at the table**

STEP 2

**Take stock of 2022**

STEP 3

**Build your 2023 goals**

STEP 4

**Create an Action Plan**

STEP 5

**Set a time to revisit and adjust the plan**

**2023**

STEP 1

**Get the right  
people at the  
table**

## **To consider as you “set the table” :**

- Who needs to participate in planning so that the people have the lived experience to reflect on the challenges that your organization addresses are weighing in on the solutions?

2023

STEP 2

**Take stock  
of 2022**

## Questions to explore with the planning group:

- What is one key fact about our work over the past year? (Each person should share.)
- What were key accomplishments?
- What were key challenges?
- Given what we have heard, what are the implications for our work going forward?
- What are next steps we can take?

2023

STEP 3

**Build your  
goals**



## Some sample goals:

- Over the next 12 months, we will recruit three new board members to join our board who share the lived experience of the community we serve.
- Over the next 12 months, we will increase our donations from individuals by 20%.
- Over the next 12 months, we'll expand program X to serve 20% more clients.



2023

STEP 4

**Create an  
action plan**

## Here are some questions to work through :

- In December 2023, what would success look like?  
*(Example – at the end of the year, three new board members who have similar lived experience to our clients will join our board.)*
- What are benchmarks to accomplish each quarter?
- Who are the “team leaders” who will keep track of progress?



2023

STEP 5

**Set a time  
to revisit  
and adjust  
this plan**

## **Before you leave the planning meeting...**

Set a time on the calendar to check in.

This might be in a week away or in a month.

# Stay in touch

## ★ CONTACT

Reach out to schedule a consult for strategic planning or training:

<https://www.therosscollective.com/contact>

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