



TAPROOT
CONSULTING

Strategy Sessions

for nonprofit organizations,
collaboratives + partnerships,
and community groups

Facilitated group strategy sessions . . .

- develop elements of strategy, to be utilized as standalone tools or building blocks for a strategic plan
- sharpen your existing plans, evaluating and adapting approaches to the present moment
- generate tools for ongoing strategic decision-making
- build relationships and nurture an inclusive and participatory culture in your organization
- identify action steps to move your strategy forward.



Session Descriptions

1 Vision + Purpose Workshop

2.5 hour session Virtual or In-Person

Sharpen the focus of your collective vision and align your collective purpose. Generate or update agreed-upon statements of vision and shared purpose for your organization to incorporate into future strategic planning or use for decision-making.

2 Boundaries Workshop

2 hour session Virtual or In-Person

Define the boundaries of your work and create a framework that can be used to evaluate future opportunities. If knowing when to say "yes" and when to say "no" is a struggle in your organization, this process and the tool you will create together will support ongoing strategic decision-making and define your niche.

3 Strategy Screen Workshop

2 hour session Virtual or In-Person

Go further in developing your organization's criteria for ongoing strategic decision-making in this companion session to the Boundaries Workshop above. Work as a group to create a tool to use alongside your Boundaries framework to screen opportunities and ideas to ensure that your choices are strategic and aligned with organizational priorities.

4 Big Questions Workshop

2-3 hour session Virtual or In-Person

Identify and explore the current Big Questions in the life of your organization. In this session we will focus on 2-5 major strategic questions that define this moment and will determine future choices. Your team will engage in facilitated conversation about these questions and generate action steps to move your organization through major strategic decisions.

5 Dynamic Tensions Workshop

2-3 hour session Virtual or In-Person

Dig into the active tensions within your work that can lead to strategic breakthroughs. What challenges, conflicts, and sticking points can reveal opportunities for growth? Identify ways to work with these tensions and agree upon a strategic course of action informed by group learning and discussion.

6 SOAR Analysis Session

2 hour session Virtual or In-Person

Scan your organization with a "SOAR" analysis. The SOAR framework is an alternative to SWOT that invites participation and generates creative, strategic thinking in a fast-paced group session. You will emerge with an inventory of organizational assets and strategic ideas to inform planning.

7 Culture Check Up

3 hour session In-Person

Assess your organization's culture, envision your dream culture, and identify actions and changes you can make together to build the organizational culture of your dreams.

8 Adaptive Strategy Session

3 hour session Virtual or In-Person

Refresh your strategies and update your existing plans. Evaluate your organization's work in an interactive, participatory format and decide together what's working and what needs to change. Work as a team to adapt plans based on what you are learning.

Contact Beth Trigg

Email: beth.trigg@gmail.com

Schedule a call: <https://calendly.com/beth-trigg>

Strategy Session

Facilitation costs





Strategy session cost is determined by 3 factors:

- Format (virtual or in person)
- Number of participants
- Length of session

Groups of 25 or more require co-facilitation with at least one additional facilitator. Co-facilitation may be added for smaller groups if desired. For groups of 50 or more participants, ask for a cost estimate specific to your organization.

Costs for all sessions include a **pre-session planning meeting**, **background document review**, and **documentation of session results**. For groups scheduling multiple sessions, prep time is reduced and bundling discounts apply.

	 VIRTUAL	 IN PERSON
2 Hour Session		
Up to 25 participants	\$1,000	\$1,300
25-50 participants	\$1,500	\$1,800
More than 50 participants - let's talk!		
2.5 Hour Session		
Up to 25 participants	\$1,200	\$1,500
25-50 participants	\$1,700	\$2,000
More than 50 participants - let's talk!		
3 Hour Session		
Up to 25 participants	\$1,500	\$1,700
25-50 participants	\$2,000	\$2,200
More than 50 participants - let's talk!		
BUNDLES		
2 strategy sessions	-10%	
3 strategy sessions	-15%	
4 strategy sessions	-20%	