

### LFA is your strategy partner to:

- Increase your capacity and culture to drive strong organizational performance
- Develop systems for using data to improve program delivery and results
- Streamline processes for ongoing goal-setting, reflection, and adjustments
- Improve communication – internally and externally – about what does and does not work

LFA brings **insight, practicality, and customization** to our strategy engagements. We share your desire for results, and we use strategy-setting and strategy-monitoring as powerful levers for impact.

We help organizations **choose a path** forward that will lead to greater impact, then **design and implement the tools** that enable:



### LFA guides you to develop systems and practices to draw insights from data when important organizational decisions need to be made

Generally, it is inefficient and ineffective to start strategic planning each time from scratch. LFA's approach to strategy emphasizes **building enduring organizational systems for learning** that can inform ongoing strategy development and refinement.

We employ **Theory of Change** – the blueprint for impact – as the basis for strategy engagements. With clarity about desired outcomes and an organization's role in creating them, it is possible to confidently plan and, more importantly, implement a clearly defined strategy.

### OUR PROCESS

While each strategy development process is unique, all of our engagements involve four phases:



*Learning for Action enhances the impact and sustainability of social sector organizations through highly customized strategy, evaluation, and research services.*



**Phase 1: Develop (or Clarify) Theory of Change.** LFA believes that mission and vision statements are not detailed enough to adequately establish the purpose and identity of an organization. Developing a Theory of Change enables an organization to define its activities to create change for clients, communities, and systems.

After conducting an assessment of strengths, areas for development, and strategic opportunities (commonly referred to as a SWOT analysis), LFA will spend one to two sessions with program leadership and organizational decision-makers to help your organization define the critical components of its change model. Our process ensures that your Theory of Change sets the stage for establishing priorities, helps you craft effective strategy, and ultimately provides a roadmap for learning.



**Phase 2: Assess Current Performance.** Now it's time to learn! Building upon the initial SWOT analysis, and using the Theory of Change as a touchstone, LFA will lead your organization through a systematic process of assessing organizational performance, program impact, and adaptability to the changing environment. This process will help your organization understand what is most important to address in each of these domains, addressing questions such as:

1. To what extent are we achieving the outcomes in our Theory of Change?
2. Is there anything happening in our environment that would cause us to question our assumptions or take a different approach to achieving our impact?
3. What aspects of our organizational performance must be enhanced to better execute on our Theory of Change?

Answering these questions will help you identify your organization's current **strategic imperatives**.



**Phase 3: Develop Organizational & Program Strategy.** To develop organizational and program strategy, you need to make intentional choices about where to focus within the set of opportunities identified in Phase 1. This requires identifying and applying a set of criteria and values by which to assess the "fit" of each potential opportunity for strengthening organizational performance and programmatic outcomes. The strategy development process requires discipline in understanding and making tradeoffs to ensure the right mix of choices that balance "mission and margin": what areas of focus and set of strategic priorities will advance the mission while ensuring and enhancing organizational sustainability?

LFA tailors how the strategy development process looks for each organization based on their goals and imperatives. We've worked through this process with organizations of different sizes, at varying stages of lifecycle development, and with different strategic imperatives at the start of the planning process.



**Phase 4: Plan for Implementation & Develop Learning Systems.** You've done the difficult work of strategy formation, now its time to plan for implementation! An LFA-crafted implementation plan clearly articulates your strategies, and identifies for each strategy a set of tactics that have timelines, responsible parties, progress indicators, and costs. As a part of implementation planning, LFA will work with your organization to design learning systems and practices, including:

1. Practical measurement tools (such as surveys or interview protocols)
2. Systems for collecting and analyzing the data you capture; and
3. Learning processes that ensure that the right data are produced at the right times for the right decision-making bodies.

Equipped with short-term strategies, a set of metrics, and systems for learning about progress toward your desired outcomes, you will have all the key attributes of a **high-performing organization!**