

# HUE Strategy

## Strategy Planning for Non-Profits Prioritizing Culture Change

A HUE (Human Understanding & Engagement) Program  
Designed Especially for Greater Milwaukee Non-Profit Leaders



May 7 - 8, 2025



9:00 am - 4:00 pm



Greater Milwaukee  
Foundation

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### PROGRAM OVERVIEW

An introduction to a strategic planning framework and the leadership concepts necessary to lead cultural and strategic change.

### LEARNING OBJECTIVES

Learn to develop and communicate your vision, build successful plans, and inspire your team to move into meaningful action.

### 3-PART LEARNING JOURNEY

Leaders from approximately ten organizations will engage in the following:

- 1. In-Person Training** – A two-day immersive session with the full cohort in May.
- 2. Pro-Bono Facilitation** – Strategic planning at no charge to your non-profit to begin in August or September, 2025.
- 3. Virtual Follow-Up** – Two sessions to refine goals, priorities, and implementation strategies in November & December 2025.

### WHO SHOULD ATTEND

Non-profit leaders (Senior Staff and Board) who want to enhance their leadership and strategy planning skills and are willing to lead their organization through the planning process. Up to two participants per organizations are invited to attend.

### WHY YOU SHOULD ATTEND

Experience authentic engagement, learn practical skills, and gather useful tools to help build buy-in and solicit valuable input from community partners.

### PARTICIPANT COMMITMENTS

- Ability to fully attend all sessions, including in-person and virtual (mandatory).
- Ability to implement planning during the cohort process, either internally or with a pro-bono facilitator.
- Selected organizations will pay a nonrefundable \$75 fee per person. Two participants per organization are encouraged to attend.
- Participating organizations are ineligible for a separate NMF strategic planning grant for 2025-2027.

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Inspiring action for the greater good through  
Human Understanding and Engagement.



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[www.hue.life](http://www.hue.life)

# Timeline

Strategic planning goes beyond document creation; it requires active implementation by your team and partners. This program promotes a culture of contribution, encouraging insights and solutions from team members, fostering ownership and accountability. It aims to help non-profit leaders optimize resources through a strategic planning process, with discussions and exercises on concepts and best practices. Participants will also experience pro-bono strategic planning, and further support will be available post-workshops.

## March 21- April 11: Application Window Open

[CLICK HERE](#) to access and submit your application by April 11, 2025.

## April 18: Applicants will be Notified of Decision

All applicants will be notified whether or not they will participate in the 2025 HUE Strategy program. The approximately ten accepted organizations will identify 1-2 two participants who will be directly involved in leading strategic planning efforts (preferably Senior Staff and Board members).

## May 7: Strategy Formation Introduction (In-Person Workshop 1)

The workshop will cover strategic planning fundamentals, including key frameworks and approaches, while allowing participants to reflect on their leadership philosophy and learn about authentic stakeholder engagement. Participants will attend in-person at the Greater Milwaukee Foundation from 9:00 a.m. - 4:00 p.m.

## May 8: Strategy Formation - Experience (In-Person Workshop 2)

This workshop covers consensus-building techniques in the ToP Strategic Planning process, allowing participants to establish a vision, identify barriers, and develop strategic directions through a participatory approach. Participants will attend in-person at the Greater Milwaukee Foundation from 9:00 a.m. - 4:00 p.m.

## June - October: Pro-Bono Strategic Planning

Pro-bono strategic planning is an optional service for non-profits in the program, involving facilitated sessions with facilitators-in-training to create a joint vision, identify barriers, and to a outline strategic plan. Follow-up sessions with the facilitator will take place virtually.

## November 11: Developing a Blueprint (Virtual Follow-Up 1)

In this workshop participants will practice establishing measurable goals aligned with strategic directions. Scheduled after the pro-bono facilitated sessions, the workshop reinforces real-life applications and enhances participants' ability to evaluate and measure their goals. Participants will attend virtual follow-ups on Zoom from 8:00 a.m. - 4:00 p.m.

## December 9: Solutions to Issues (Virtual Follow-Up 2)

This workshop addresses implementation challenges by highlighting common pitfalls, encouraging peer coaching, and sharing strategies. Participants will receive templates to help resolve issues during implementation.

# HUE Strategy Sessions Learning Objectives

## Session 1: Strategy Formation – Introduction

This workshop introduces the fundamentals of strategic planning work; participants will explore various schools of thought related to strategy formation and will explore definitions often used in the strategic planning process. Participants will also reflect on their own leadership philosophy and clarify what is necessary to engage stakeholders authentically in the strategic planning process. In this session, participants will learn:

- Foundational elements of strategic planning
- Develop a vocabulary for strategic work
- Apply strategic planning terminology in a non-profit context
- How to include diverse perspectives and tap into the expertise of each team member

## Session 2: Strategy Formation – Experience

This workshop introduces consensus-building techniques used in the ToP Strategic Planning process. The participants will experience a participatory process for establishing the vision, identifying the blocks and barriers, and developing strategic directions. In this session, participants will learn:

- How to engage participants in building agreements
- How to gain buy-in from stakeholders, decision-makers, and those charged with the implementation of the plan
- How to engage stakeholders in discovering that the status quo is not an option

## Virtual Follow-Up 1: Developing a Blueprint

The participants will be able to practice establishing measurable goals that are grounded in the strategic directions. This workshop will be scheduled post pro-bono facilitated session, where participants will be able to experience the facilitated process. This workshop will be used to re-iterate what they would experience in the real-life application and build their capacity to evaluate and measure goals. *(Note: participants who did not have experience of a facilitated process conducted by a team of HueLife facilitators will be able to participate and learn from other participants' experience)* In this session, participants will learn:

- The importance of establishing accountability
- How to develop SMART (specific, measurable, action-oriented, realistic, and time-bound) goals
- How to help the groups stay on track with their plan
- How to establish priorities

## Virtual Follow-Up 2: Solutions to Issues

This workshop reveals common pitfalls in implementation and brings the group's wisdom to the forefront of implementing change. Participants will be engaged in peer coaching, sharing, and collecting implementation strategies for future reference. This workshop will also include templates for helping the group solve issues during the implementation. In this session, participants will learn:

- Reflection and evaluation tactics
- How to stay engaged with the stakeholders throughout the implementation process
- How to help the groups stay on track with their plan and adjust when needed
- Best practices for check-ins and progress tracking

This program is being brought to you through the partnership between