

## Root Action strategic planning support

No other type of planning is as consequential for an organization as strategic planning. It deals with high-level goals, fundamental strategies and programmatic and structural/operational choices which affect your entire organization, for a long time.



A great strategic plan can establish or evolve a well-considered course to advance your organization's mission, guide it through tough questions, and improve working relationships, staff satisfaction, ownership, clarity and much more. *Unfortunately, the reverse is also true.* Great plans stem from great planning work, so choose your support carefully.

Skip skillfully navigated our organization through a high-stakes strategic planning process despite several unexpected and potentially overwhelming challenges. He did a great job.

Bob Scowcroft  
Executive Director, Organic Farming Research Foundation (Santa Cruz, CA)

### ***Root Action combines critical competencies for successful planning***

We bring several critical areas of competency to strategic planning:

1. **Strategic planning experience** resulting in a broad set of methodologies for creating effective, organization-appropriate strategic plans that can greatly enhance mission fulfillment;
2. **Expert facilitation and group process skills**, which are essential in planning that is both inclusive, efficient and effective;
3. **Skills in strategy development**, a surprisingly often missing component in strategic planning efforts;
4. **Broad subject matter expertise** in social change and non-profit issue areas;
5. **Effective written and interpersonal communication skills**; and
6. **Training skills** that help organizations build in-house capacity for subsequent strategic and program-level planning.

The first three of these are among the most common factors in strategic planning efforts that waste time and resources, cause needless frustration, undermine quality participation and support, and result in lackluster or misguided strategic plans.

We developed an exciting, fundable and highly strategic new direction that is transforming the Center. We'd hire Skip again in a heartbeat.

Patricia Allen  
Director, Center for Agroecology and Sustainable Food Systems (Santa Cruz, CA)

### ***Root Action can do a little or a lot***

We can facilitate your entire strategic planning project or provide selected kinds of support, including:

- Assessment of prior planning
- Development of an appropriate planning project plan
- Planning guidance
- Facilitation of retreats, meetings and other group process
- Internal and external assessment
- Strategy development
- Organization development guidance
- Drafting
- Capacity building
- Implementation and other follow-up support

We can work with you to help determine an appropriate balance of in-house and external resources.

Skip took on a difficult role in establishing a coalition for targeted international action among groups across the globe. With composed perseverance -- and creative use of low cost communication tools -- he facilitated a stronger and well targeted campaign.

Barbara Dinham  
Director, Pesticide Action Network UK (London, UK)

### ***Root Action's approach is highly effective***

Our approach to strategic planning is both programmatic (applying our core methodologies to your planning objectives) and tailored and responsive to the work styles, culture and organizational circumstances of your organization.

Relying on more than 30 years of experience working for social and environmental change, we:

- Help identify **explicit project outcomes** and make sure they are achieved;
- Emphasize real **strategy development**, not just priority- or goal-setting;
- Orchestrate an inclusive yet efficient **balance of participation**;

- Ensure realistic and comprehensive **implementation and revision measures** to make sure your plan is executed and remains responsive to changing conditions;
- Clarify the **planning scope** (what organizational aspects are being planned and those that are off the table or slated for subsequent or “downstream” planning);
- Work responsively through ongoing process **feedback**;
- Provide a simple approach to thinking about **types of goals and how they operate at various levels of planning**, thus avoiding one of the most common pitfalls;
- Use our carefully developed **handouts, worksheets, templates and other tools** to work expeditiously and clarify planning concepts and steps; and
- Continually **support organizational learning** to build capacity for subsequent planning work.

We begin and remain fully invested in a successful outcome. We are not interested in simply helping, but rather continuing our notable track record of successfully positioning valuable organizations to advance their missions. Promoting effective change is the fundamental reason that we do this work.

Our county peace coalition was very near disbanding due to conflicts and irreconcilable personalities. Skip skillfully led us to a whole new framework for our organization, while patiently teaching us skills we continue to use today. Skip won the hearts and appreciation of the peace community in Monterey and we owe him a great debt.

Valori George  
Director, Monterey Peace and Justice Center (Monterey, CA)

### ***Root Action’s services are competitively priced***

Our fee structure is very competitive. We have virtually no overhead, do not mark up expenses, have no hidden charges, and use a sliding scale based on your resources and the nature of your work.

Thank you for the excellent job. You brought a perfect balance of flexibility, bylaws and humor to deal with a potentially explosive situation.

Jean Peterson  
President, El Rio Mobile Home Cooperative (Santa Cruz, CA)

### ***How to engage our services***

Let us know about your situation and desired outcomes. We’ll discuss your planning needs with you. If the job seems like a good match for us, we’ll provide a bid, and be available for additional dialogue needed to enable you to reach a decision that is best for your organization.

We'll provide a thoughtful, no-nonsense, brief written contract designed to protect both parties, or work with your contract if preferred. We'll meet to finalize a tailored planning project plan to lay the foundation for a successful experience and then get the work underway.

Your work and report were excellent. I particularly appreciated the quality and quantity of research, assessment, impartiality, and overall clarity.

Christine Johnson-Lyons  
Executive Director; Community Action Board of Santa Cruz County (Santa Cruz, CA)

## ***Principal***

Our strategic planning support is provided by Root Action Consulting principal Skip Spitzer.

A change maker on a wide range of social and environmental issues for more than 30 years, Skip has worked from the local to the global level. He has started co-ops, run electoral campaigns, founded a labor union, worked in war zones, coordinated international coalitions, and helped negotiate global environmental treaty texts.

Among many other organizations, Skip has worked with Agribusiness Accountability Initiative, Pesticide Action Network (PAN) International, Women's Campaign for Guatemala, Ecological Farming Association, California Indian Legal Services, Long Island Eastern Farm Workers Association, Pastors for Peace Cuba program, United Farm Workers, Genetic Engineering Action Network, and Resource Center for Nonviolence.

Skip is also a social change skills trainer, focusing on organizational development, campaign development, facilitation, consensus process, grassroots organizing, using non-violent direct action, and other topics. He has given workshops at Ruckus Society action camps, a wide range of movement conferences, and numerous national mobilizations. He has also authored a variety of activist skills articles and materials.

Skip trained as a Conflict Resolution Mediator at the Conflict Resolution Center in Aptos, CA. Earning an M.A. in sociology from the University of California, Santa Cruz, he has taught at California universities and community colleges, and has authored many articles and other publications, including "A Systemic Approach to Occupational and Environmental Health," appearing in the *International Journal of Occupational and Environmental Health*.

For many years Skip worked as a software engineer for computer industry leaders such as Netscape Communications and Borland International. He developed databases for the Delta School for at-risk youth and the Central American Refugee Center. Skip has designed and developed high-end websites and Web applications, and online systems for a variety of organizations. He developed the Web-based Global Collective Action Tool for facilitating international collaboration.

Long interested in how positive change happens, Skip believes that effective and inclusive collective action is an essential factor in building a new world. He created Root Action Consulting to help people of conscience work together better.

Skip lives in Portland, Oregon, and likes to backpack, play guitar, build things, raise his son, and teach consensus process to his cats.

Skip used his formidable skills to conduct a remarkable outdoor meeting with 1,000 people from diverse backgrounds, surrounded by the police and without real sound amplifying equipment. He pulled us together, allowing a full democracy to blossom.

Mitchel Cohen

Author; Coordinator, No Spray Coalition (New York, NY); Editor, *G* (newspaper of the NY State Greens)