Strategic Priorities 2025 - 2028

LEADERSHIP
Governance
Staff
Sections

COMMUNITY
Experience
Benefits
Inclusion

SYSTEMS
Sections
Committees
Finances

ADVOCACY
Legislative
Ambassadorship
Outreach

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STRATEGIC PLAN 2025-28

Colorado Parks and Recreation Association

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I. INTRODUCTION

Colorado Parks and Recreation Association (CPRA) contracted with Emily Davis Consulting to conduct a strategic planning process including data collection and analysis and a facilitated retreat, resulting in a three-year strategic plan.

The following strategic plan and referenced resources are meant to support the process of identifying stakeholder-informed strategic priorities, goals, objectives, action items, and implementation beginning in November 2025 through June 2028.

II. STRATEGIC PLANNING PROCESS

Strategic planning is as much a process as it is a guiding document; time spent gathering feedback, participating in a board retreat, and documenting the strategic priorities are all encompassed within this strategic plan. Emily Davis Consulting worked in partnership with CPRA's Board of Directors and staff to design the following strategic plan.

The purpose of a strategic plan is to provide high-level focus on strategic priorities for a three-year period. The strategic priorities provide a roadmap to guide the organizational activities and aim to keep CPRA focused rather than being diverted by competing priorities. The plan is a governing document with oversight provided by the Board and the Executive Director (ED). The ED works with staff, committees, volunteers, and consultants as needed to implement and operationalize the plan.

This strategic plan is a result of the information gathered and shared throughout the Discovery Phase and during the board retreat. The strategic plan is a launch pad for coordinated, focused priorities and increased accountability of stakeholders. Concrete examples are provided whenever possible to allow for easier implementation and tracking. Implementation strategies are referenced throughout the plan and included in full in the final section of this document.

A strategic plan is meant to serve as a living document that provides overall organizational direction. It is the board's responsibility to make any necessary adjustments or revisions to the strategic plan with

recommendations from the staff via the ED. It is the responsibility of the staff and board (via the ED) to operationalize the respective plan goals/objectives. The strategic plan is ultimately a document used to set focus areas; to provide recommendations around action items; and to align Board and employee engagement.

> *The strategic plan is the record of agreements that have been reached through the strategic planning process. The document is by no means the sole purpose of the process; it is simply the first concrete indication that your planning has reached a measurable junction. The written plan contains the guidelines for future action for your organization based on data that the organization has and assumptions it makes.*
>
> -   *Driving Strategic Planning*, BoardSource

This document includes information about the entire strategic planning process beginning with highlights from the situational analysis report; followed by strategic priorities including goals and objectives; and concluding with plan implementation recommendations. The strategic plan is developed through a comprehensive process defined in four phases:

| Phase 1: Discovery | Document audit | Input calls | Surveys |
Phase 2: Retreat	Situational analysis report	Governance education	Facilitation
Phase 3: Documentation	Narrative	Dashboard	Tools & resources
Phase 4: Implementation	Board	Staff	Committees

Discovery Phase:

Data was collected from a variety of sources, and then compiled to develop a situational analysis report. Sources included:

- Board self-assessment (board and former ED)
- Organizational assessment (staff only)
- Engaged stakeholder survey

- Member satisfaction survey
- Board member input calls
- Staff input calls
- Engaged stakeholder input calls
- Organizational document audit
- Organizational lifecycle assessment

The purpose behind collecting information from a variety of sources with various methods is to create a *data-driven approach* to strategic planning. This method provides a holistic view of the organization's strategic focus areas and avoids the plan being directed by only a few individuals.
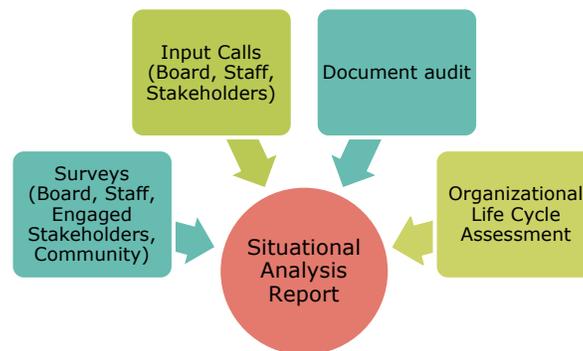
Retreat Phase:

The following activities were included in the organizational strategic planning retreat to provide further information for the strategic plan:

- Motivational values for serving on the board
- Situational analysis report discussion
- Priority area strategies, tactics, and resources
- Next steps

During the retreat, the board and interim ED were asked to reflect on and discuss the situational analysis report. This process helped to guide the development of strategic priorities and opportunities for change over the next three years. The strategic plan reflects the revised priorities, goals, and objectives informed by the Discovery and Retreat Phases. For more details on the retreat please see Appendix E: Retreat Materials.

Documentation Phase:

Included in the documentation phase is the strategic plan narrative itself along with a host of supplemental documents to support the implementation of the plan. We develop a plan that is informed by the process, select implementation resources and samples to help keep the plan relevant for the organization, and provide tools to support implementation.

In each section of the plan, in addition to the strategic priorities, goals, objectives, and suggested timeline, we provide a narrative with resources and examples. We also provide resources with additional information to support implementation including publications, organizational resources, and more.

In addition to the plan itself, CPRA also has access to the following resources:
- Strategic plan snapshot (Appendix A)
- Dashboard for implementation (Appendix B)
- Situational analysis report (Appendix C)
- Sample implementation tools folder (Appendix D)
- Retreat materials (Appendix E)
- Survey raw data (Appendix F)

Ultimately, the board and staff are responsible for the oversight and operations of the strategic plan. We have found that creating and using a Governance Committee provides the best results in keeping a plan "alive." We recommend that CPRA creates a Governance Committee – chaired by the board vice chair (incoming chair) – to support the oversight and implementation of the plan along with other regular, ongoing duties like board recruitment (see Appendix D for sample governance committee description).

III. SITUATIONAL ANALYSIS SUMMARY

In the situational analysis report CPRA will find the methodology, key findings, limitations, and recommendations developed in the Discovery Phase of the strategic planning process. For full details from the report, please review the complete Situational Analysis Report in Appendix C.

The situational analysis report provides a broad summary of the activities and evaluation results to help leadership understand CPRA's organizational positioning during the third quarter of 2024.

IV. STRATEGIC PRIORITIES, GOALS, & OBJECTIVES 2025 – 2028

Based on the Discovery and Retreat Phases in the strategic planning process, the following are CPRA's identified strategic priorities over the next three years.

LEADERSHIP | COMMUNITY | SYSTEMS | ADVOCACY

The following section explores each of these strategic priorities in greater detail, expanding on the strategies through goals, objectives, sample tactics, timelines, and responsible parties. Each of the strategic priorities weave into the others ultimately working together to build a larger picture of

organizational success. The strategic plan narrative outlines the strategic priorities, goals, and objectives. In the implementation dashboard (Appendix B), CPRA board and staff will need to delve into developing the tactics needed to meet the objectives, goals, and priorities. We have offered one sample tactic under each objective to help.

Recommendations have been made related to the timeline and responsible parties for objectives and tactics. CPRA's board and staff will need to review these suggestions and make any needed adjustments. It is recommended that CPRA review the priorities, goals, objectives, and tactics on a regular basis (at least annually) and adjust them as needed. CPRA can use the goals, objectives, and tactics to build into board, staff, and committee work plans.

Definitions

The CPRA strategic plan is structured around four larger "buckets" or priority areas under which the goals, objectives, and tactics lay. In this strategic plan narrative, each priority is followed by recommended goals and objectives. Each objective includes a recommended completion date (timeline) and narrative that expands on the explanation for the objective and tools for implementing the objective. CPRA may use this narrative for reference when implementing the strategic plan and building out tactics under each objective in the dashboard (Appendix B).

The following graphic outlines the flow of this structure and who takes primary responsibility for its oversight and implementation.

Strategic Priorities

- Board, functional business areas that will be developed or modified.
- Board & ED provide oversight

Goals

- Benchmarks that define what needs to be done to address a priority, speaking to shifts in the organization.
- Board & ED provide oversight

Objectives

- Building blocks on how to achieve goals, which are often quantitative.
- ED, staff, committee volunteers operationalize

Tactics (aka activities)

- Specific actions, events, tasks needed to meet objectives.
- ED, staff, volunteers involved in implementation

Work plans

- Action plans around tactics, connected to milestones and deadlines.
- Staff and committee volunteers

STRATEGIC PRIORITY A: LEADERSHIP

Objective A1.1: Develop recruitment and selection process and plan for new executive director.

One of CPRA's highest priorities is to identify executive leadership. During the discovery phase and retreat, the board and staff addressed the need for an executive director that has knowledge of nonprofit business, membership organizations, statewide engagement, and capacity to support stakeholders across the organization.

While there is urgency in identifying a new executive director, it is equally important to select the *right* executive director for the organization. CPRA may consider an ad hoc selection committee made up of board, staff, and membership (5 – 7 individuals) to outline the process and goals for identifying a new ED. CPRA may also consider hiring a professional recruiter for the ED position or explore hiring an Interim ED. Interim EDs who specialize in nonprofit business management can come into an organization on a fractional or part time basis to clean up and tighten up practices and systems that demonstrate the need for support. They can set an organization and the permanent ED up for success through short-term engagement.

A documented recruitment process including an updated ED job description will help guide CPRA, create accountability, and allow the team to evaluate any changes that need to be made for future ED hiring.

Objective A1.2: Refine practices for executive director oversight, evaluation, and support.

While the CPRA board has conducted past ED evaluations, there may be a need for refining the process. The ideal evaluation process is a 360-degree executive evaluation conducted by an external consultant with expertise in nonprofit business practices. BoardSource also offers the Assessment of the Chief Executive (ACE) service.

Using the annual evaluation, the board can help to identify areas of needed and desired growth and ongoing education for the ED. The annual budget

should include a line item for professional development for all staff including the ED.

The board should also identify specific areas of oversight for the incoming ED including asking fiduciary (what), strategic (how), and generative (why) questions. Collecting financial, programmatic, and management reports to stay informed will help to create a healthy balance of board members staying informed while not digging into operations. A new ED should be knowledgeable, engaged, and collaborative with the board in their governance functions. The board can learn more about chief executive oversight through BoardSource's publications and online learning.

The board and ED should work together to develop a succession plan as soon as the ED is fully oriented to the organization. There are three types of ED succession plans for CPRA to consider developing: emergency, proactive, and planned. Typically, the ED succession plan is developed by the ED and an executive or governance committee and reviewed every one or two years.

Objective A1.3: Outline processes for shared leadership between board, executive director, and staff.

The board and ED can work together to engage in increased shared leadership practices. As the primary liaison between the board and the ED, the board chair plays an important role in meeting with or speaking with the ED on a regular basis to stay informed and aligned with the organization's needs. While taking the time to meet may seem time-intensive, the effort can save time in the long run by keeping all parties informed and coordinated. The board chair can champion support for the ED and analyze critical questions in partnership in advance of and during board meetings.

By understanding and practicing shared leadership roles in governance and operations, CPRA will set the board and ED up for long-term success and sustainability. Shared leadership between the board of directors and the staff (via the ED) is a commonly misunderstood balance. Board members traditionally join a board because of their passion for and connection to the mission and programs of an organization. The board's role in relation to the staff can be confusing and may need clarification to help distinguish roles and effective work.

The ED looks to the board to set the priorities for the organization that they will implement through staff, volunteers, and donors. A strategic plan is traditionally the vehicle for identifying priorities, goals, and objectives for an organization. The board needs to have reasonable and clear expectations for the ED and understand the boundaries of time and capacity in identifying goals and objectives. This is critical for human resource sustainability; no ED will be able to manage all the strategic, operational, and administrative tasks of an organization if they are excessive and misaligned with the organization's priorities. Without a clear strategic direction, it's difficult for an ED to know when to say "yes" to opportunities for the organization — or, much more challenging, when to say "no."

Ideally, an organization will find that sweet spot of shared leadership where the ED and board are working in harmony. Finding this place is in consistent flux, however, as external and internal factors impact the organization. What we do know is that there are governance practices to avoid:

- *Governance as attendance*: Essentially this type of governance is when the ED and the board are asleep at the wheel. No one is really taking initiative, which may lead to complacency and perhaps even dissolution.
- *Governance as observation*: In this circumstance, the ED is guiding all the governance of the organization. In many cases, this is when the board is acting as a "rubber stamp" for decisions. The members are not asking the questions of what, how, and why. We often see this in organizations where there is a founder in the ED role.
- *Governance as micromanagement*: This scenario reflects when the board has displaced the ED to the point that the ED may be powerless in governance responsibilities. Often the board is highly involved in operations rather than delegating those responsibilities to the ED or wearing the proper "hat" — legal, volunteer, or ambassador.[1]

Governance as leadership is the model that the CPRA board should strive to achieve. This is very much a practice and takes time and shared understanding and expectations. Like so much of board governance, shared leadership is a combination of art and science. The science is knowing the best practices, and the art is feeling through organizational and personal

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[1] *Governance as Leadership*, Richard P. Chait, William P. Ryan, and Barbara E. Taylor (2005)
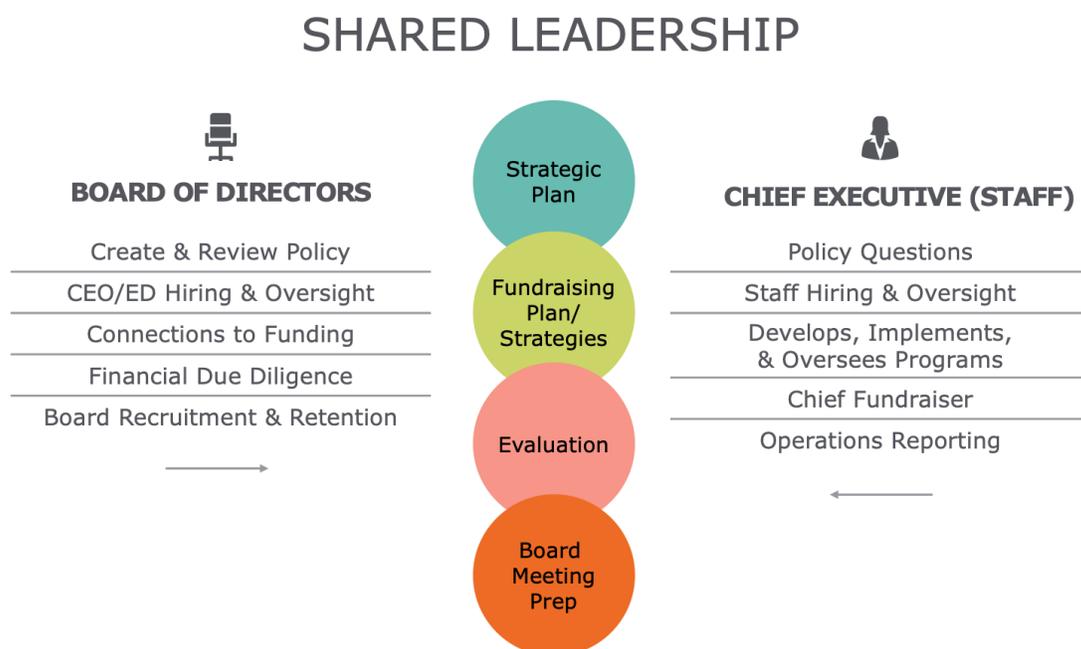
dynamics to best serve the organization for the greatest short- and long-term impact.

Any organization needs to learn who leads various activities in the governance function. It's not to say that one entity — ED or the board of directors — is the only one responsible or involved, but to clarify who is ultimately the entity leading the effort. For example, the board is responsible for recruiting its own board members, while the ED is involved in helping to funnel candidates and provide feedback throughout the process.

In some cases, there are completely shared activities, such as performance evaluation or assessment. Board self-evaluation and executive director performance assessments are two examples where board members and the ED should participate equally.

Here's a quick reference of what shared leadership looks like[2]:

SHARED LEADERSHIP

BOARD OF DIRECTORS

Create & Review Policy

CEO/ED Hiring & Oversight

Connections to Funding

Financial Due Diligence

Board Recruitment & Retention

Strategic Plan

Fundraising Plan/ Strategies

Evaluation

Board Meeting Prep

CHIEF EXECUTIVE (STAFF)

Policy Questions

Staff Hiring & Oversight

Develops, Implements, & Oversees Programs

Chief Fundraiser

Operations Reporting

A sample board/staff structure is below. There are many variations on this structure, however, this gives a framework to begin with. While the board of directors' hires, oversees, and supports the ED, the ED and board work side-by-side to meet the needs of the organization.

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[2] "Uncovering the Mystery: The Art and Science of Shared Leadership," Emily Davis, 2016

The shared leadership between the board of directors and the ED is an important role. The ED serves as the liaison between the board and the staff. While their role is overseen by the board as a collective, the board and ED need to work side-by-side to meet the mission and achieve the strategic priorities for the organization.

For this reason, the work between the ED and the board chair are even more important for short-term and long-term success. *The Board Chair Handbook* is a useful resource for the board chair to consider reviewing and using for reference.
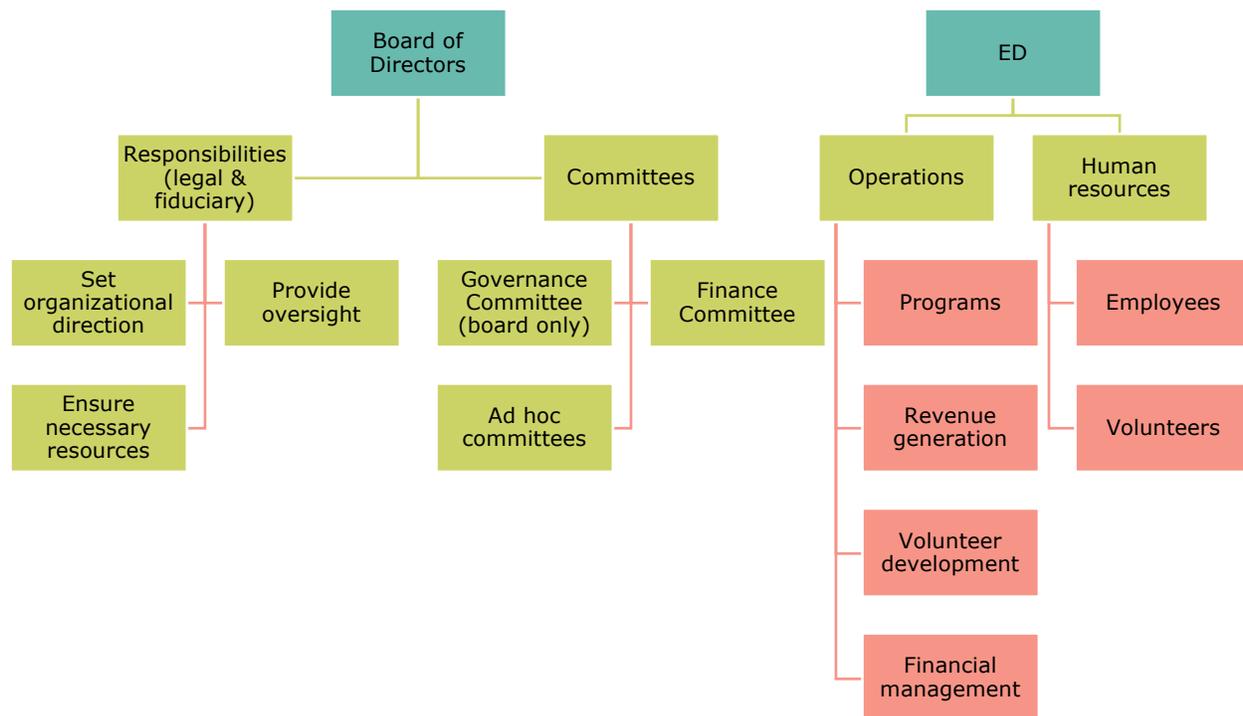
The CPRA board can focus their time on issues of greatest consequence to the organization by reducing time spent reviewing routine reports, verbally communicating minutia of staff and committee work, and redirecting attention to cross-cutting and strategic issues not addressed elsewhere. The board meeting agenda is a great tool for shifting the board's focus and elevating the level of discussion at the board table. To ensure the board does better work, the agenda may require reprogramming, and the board may need to reframe its questions and purpose.

Achieving a healthy shared leadership model is one that is constantly evolving. There are some key elements to continued success when sharing leadership between the board and employees:

- Outline and document clear roles and responsibilities of board and staff
- Understand the right "hat" board members should be wearing in any given situation
- Avoid extremes of board governance as micromanagement and observation
- Encourage a culture of inquiry
- Develop a committee structure that allows board and staff to work side by side
- Participate in regular board self-assessments that examine shared leadership between board and staff

Shared leadership is primarily a practice that needs consistent attention. It is as much art as it is science. By considering strategies to understand and implement strong shared leadership, CPRA will find ongoing success.

Objective A2.1: Conduct audit and assessment of staff sustainability.

During the discovery phase of strategic planning, the staff expressed need for greater support to meet the capacity needs and CPRA goals. The two greatest resources in any nonprofit organization are people and money. Retaining talented staff is critical for long term sustainability at any organization. CPRA has operated with a staff skeleton crew over the last few years through leadership transitions and challenges.

Moving forward, it makes sense to determine where the strengths and weaknesses currently exist in staff sustainability. This includes current retention practices like professional development and need for additional support such as part time, full time, or contract expertise. Examples might include marketing, ED assessment, financial management, and volunteer management. Once CPRA's financial picture is clearer, the board and ED should identify areas of financial investment to enhance operational longevity and excellence.

Objective A2.2: Assess and compare employee benefits and compensation.

From time to time, it is wise for an organization to conduct a comparison of salaries and benefits. Organizations like Colorado Nonprofit Association and Mountain Employers Council provide reports like the 2025 Colorado Salaries and Benefits Survey. These provide benchmarks for CPRA to use in assessing their strengths and areas of improvement. Once CPRA has a clearer picture of their financial resources, the ED can make recommendations to the board for consideration on staff salaries and benefits for the annual budget.

In the short term, CPRA may want to consider an ad hoc working group to look at the last couple years of merit and cost of living raises that were missed and adjust as needed. Quality staff is one CPRA's greatest resources; the organization should do what it can in the interim to meet the critical financial needs of the staff.

Objective A2.3: Improve staff retention practices.

One area that CPRA leadership has already begun to invest in is professional development for the employees. Placing a priority on ongoing learning for individual employees is important both for increasing their knowledge and excellence in their roles but also as a demonstration of the investment that CPRA has in the work of all their employees.

Establishing a budget that includes professional development as a line item, encouraging staff to engage in professional development, and sharing the learnings from those opportunities will all contribute to a culture of ongoing learning. Throughout the Discovery and Retreat Phases, the interest in and development of ongoing learning came up as a priority investment for ongoing success.

A critical element of effective leadership is ongoing feedback, measurement, and performance evaluation for all employees. During the Discovery Phase, many participants reported needing regular (e.g. annual) performance assessments to help support and direct their work at the company. How these performance assessments are conducted is just as important as if they happen at all. If a performance assessment is not high quality, the information won't help to support the employee. For example, the ideal performance assessment for an ED is a 360-degree review which is overseen by the board (sometimes through an ad hoc working group or governance

committee). The results of the review are used to offer support and guidance to the ED for future leadership.

CPRA should also consider less formal but equally important feedback systems throughout the year from one-on-one check-ins with staff to opportunities for anonymous feedback. Incorporating these less formal feedback platforms has the possibility of enhancing the organizational culture, helping employees to be heard and valued.

Objective A3.1: Review, update, and document board recruitment process.

Developing a consistent board recruitment strategy will help CPRA to create a pipeline of prospective board members who both align with the organization's vision as well as provide fresh perspectives to move the organization in the future. As part of ensuring human resources at the board level, it will be important for CPRA to craft a comprehensive, consistent, and annual recruitment process. BoardSource outlines the recruitment process in *The Board Building Cycle* below (Appendix D):
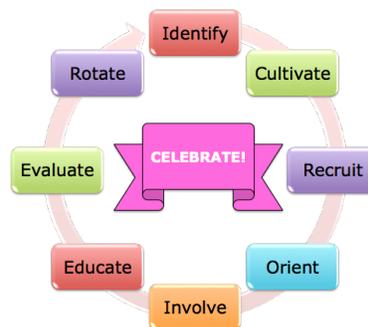
Source: *The Board Building Cycle*, BoardSource

Well-designed recruitment processes are approximately six months in length. This allows for designing or revising the process, crafting the application steps, vetting candidates, and onboarding. The board recruitment process is best managed by a governance committee who oversees the process, implements the steps, and makes recommendations to the entire board.

Below is a sample timeline for board recruitment (see Appendix D for more information):

Month 1	• Review docs & past recruitment • Design self-eval
Month 2	• Conduct self-eval & demo matrix • Design application, interview questions & outreach messaging
Month 3	• Add to website • Share with networks
Month 4	• Schedule & conduct interviews • Invite to board meeting
Month 5	• Host at board meeting • Make recommendations
Month 6	• Inform candidates • Schedule orientation • Intro board buddies
Month 7	• Debrief process • Gather feedback

Source: Emily Davis Consulting

As part of the Board Building Cycle™, board members will transition off the board. Once a board member exits his or her service on the board it is critical that CPRA has a strategy for keeping these individuals engaged, informed, and honored. One strategy is to create an Honorary or Emeritus Council. This could be a group of past board members, major donors, and other essential stakeholders who are strongly connected to the organization, but do not serve in a governance capacity.

Many resources related to board recruitment have been provided in the implementation resources. References to these resources can be found in Appendix D including sample board job descriptions, board application, recruitment checklist, and more. CPRA should look at their current process to compare with the recommendations provided and document an updated process. This can be managed through a standing governance committee or working group/task force.

Once recruitment is completed, it is critical to consider ongoing engagement strategies for intentional building and maintaining a healthy board culture. From board orientation to meeting facilitation to off boarding exiting board members, CPRA should consider the entire life cycle of an individual board member's experience.

There are many meetings that board members engage in throughout the year; using best practices in meeting planning, facilitation, and follow up will be useful in establishing healthy and happy board engagement. Many organizations assume that they need to use parliamentary procedure (Robert's Rules of Order) for board meeting facilitation. While rules of order are needed for successful, official meetings, an alternative for consideration is *Roberta's Rules of Order* which offers an alternative and more democratic approach for meeting facilitation such as rotating responsibilities. Parliamentary procedure is more appropriate for large groups of individuals making decisions such as in congress.

Since much of the decision-making and strategic discussions happens in. board meetings, CPRA should be deliberate about engaging effective board meeting facilitation practices. Annually, either as a part of or separate from the board self-assessment, CPRA should consider conducting a board meeting evaluation to determine where to continue and where to pivot the structures and practices in board meetings. A sample is provided in the implementation resources.

Within board meetings, board members are encouraged to practice implementation of a combination of fiduciary (what), strategic (how), and generative (why) questions as part of generating a culture of inquiry. Positioning this thinking as a core practice within board meetings reinforces the oversight work of the board and, therefore, oversight and protection of the mission.

Type I - Fiduciary governing (what)	Type II - Strategic governing (how)	Type III - Generative governing (why)
• Understands the trustee as one who holds assets for the benefit of another. • Board ensures assets are conserved and optimized to support mission. • Boards see that resources are used efficiently and responsibly — budgets are focal point. • Boards focus on oversight and accountability, reports and approving, rather than discussion, imagination, visioning, strategizing, and valuing.	• Strategic thinking and planning are primary mode and focus. • Lurking behind everything: Quest for the institution's primary focus, its core task. • Board organizes around strategic priorities, not administrative operations. • Balanced budgets are no longer sufficient if resources are dedicated to the wrong purposes. • Trustees ask: What business are we in? What do our customers want? Where do we have a comparative advantage? What are our core competencies?	• Focuses primarily on "framing the problems and issues" and meaning making or "making sense" out of something. • Inevitably subjective in nature, but generates other critical processes of mission setting, strategy development, and problem solving. • Provides both a new frame for understanding the organization and its environment and a new vocabulary for talking about what is perceived. • The creative foundation out of which goal setting and decision-making originate.

Refer to the situational analysis report for even more detail on resources for effective board meeting engagement and facilitation. Be sure to keep board meetings focused on fiduciary, strategic, and generative thinking rather than operational activities that can be delegated to and appropriately executed by the staff.

Objective A3.2: Revisit membership voting process for board members.

During the CPRA discovery phase, recommendations were made to explore the membership voting process for board members. During the retreat, the board continued the conversation and briefly discussed a few options for membership voting including:

- Keep membership voting as is
- Membership votes on the nominated at-large members only
- Membership votes on a proposed board slate of members-at-large and officers

- Select board members internally and remove membership voting from bylaws

Because CPRA is a 501(c)3 organization, it has the flexibility to select what type of membership voting makes the most sense moving forward. Whatever the final decision is, CPRA will need to update the bylaws as appropriate. It is recommended that the CPRA board, a governance committee, or an ad hoc working group explore and make recommendations for future membership voting.

Objective A3.3: Refine board engagement activities, accountability, and shared leadership.

There are a variety of methods of enhancing board engagement and accountability in board governance. Ongoing professional development opportunities are a way to continue to build board members' knowledge about board governance and benefit CPRA at the same time. Many organizations will use their annual retreat as an opportunity for ongoing board education. CPRA may also set board expectations that board members participate in an annual professional development activity related to nonprofit board governance.

Some organizations will create a menu of engagement activities for board members to participate in throughout the year with the nonprofit. This can include events, professional development, open houses, fundraising activities, membership outreach and more. At the start of every year, board members identify activities they can commit to participate in.

It is important that from the start of a board member's tenure they are clear about the expectations for board service and engagement. Updating the board member-at-large job description and letter of commitment will help to standardize and create consistent expectations across board members. This also allows board members to hold one another accountable for showing up and fulfilling those expectations.

Lastly an annual or biannual board self-assessment (short form or long form) is a useful tool for board members to reflect on their individual and collective participation in board governance. When a board member is falling short of minimum expectations, it is critical for the board chair (or another

board officer) to address the issue directly and kindly with that individual board member. Approaching the situation with curiosity and kindness may help to retain the relationship rather than damage it for the long term. Addressing unengaged board members will protect and demonstrate value for the other board members fulfilling their responsibilities, more likely ensuring their continued participation.

The board and ED can work together to engage in increased shared leadership practices. As the primary liaison between the board and the ED, the board chair plays an important role in meeting with or speaking with the ED on a regular basis to stay informed and aligned with the organization's needs. While taking the time to meet may seem time-intensive, the effort can save time in the long run by keeping all parties informed and coordinated. The board chair can champion support for the ED and analyze critical questions with her in advance of and during board meetings.

By understanding and practicing shared leadership roles in governance and operations, CPRA will set the board and ED up for long-term success and sustainability. Shared leadership between the board of directors and the staff (via the ED) is a commonly misunderstood balance. Board members traditionally join a board because of their passion for and connection to the mission and programs of an organization. The board's role in relation to the staff can be confusing and may need clarification to help distinguish roles and effective work.

The ED looks to the board to set the priorities for the organization that he or she will implement through staff, volunteers, and donors. A strategic plan is traditionally the vehicle for identifying priorities, goals, and objectives for an organization. The board needs to have reasonable and clear expectations for the ED and understand the boundaries of time and capacity in identifying goals and objectives. This is critical for human resource sustainability; no CEO will be able to manage all the strategic, operational, and administrative tasks of an organization if they are excessive and misaligned with the organization's priorities. Without a clear strategic direction, it's difficult for a CEO to know when to say "yes" to opportunities for the organization — or, much more challenging, when to say "no."

Ideally, an organization will find that sweet spot of shared leadership where the ED and board are working in harmony. Finding this place is in consistent

flux, however, as external and internal factors impact the organization. What we do know is that there are governance practices to avoid:

- *Governance as attendance*: Essentially this type of governance is when the ED and the board are asleep at the wheel. No one is really taking initiative, which may lead to complacency and perhaps even dissolution.
- *Governance as observation*: In this circumstance, the ED is guiding all the governance of the organization. In many cases, this is when the board is acting as a "rubber stamp" for decisions. The members are not asking the questions of what, how, and why.
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Governance as leadership is the model that boards should strive to achieve. This is very much a practice and takes time and shared understanding and expectations. Like so much of board governance, shared leadership is a combination of art and science. The science is knowing the best practices, and the art is feeling through organizational and personal dynamics to best serve the organization for the greatest short- and long-term impact.

Any organization needs to learn who leads various activities in the governance function. It's not to say that one entity — ED or the board of directors — is the only one responsible or involved, but to clarify who is ultimately the entity leading the effort. For example, the board is responsible for recruiting its own board members, while the ED is involved in helping to funnel candidates and provide feedback throughout the process.

In some cases, there are completely shared activities, such as performance evaluation or assessment. Board self-evaluation and executive director performance assessments are two examples where board members and the ED should participate equally.

A sample board/staff structure is below. There are many variations on this structure, however, this gives a framework to begin with. While the board of

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[3] *Governance as Leadership*, Richard P. Chait, William P. Ryan, and Barbara E. Taylor (2005)

directors' hires, oversees, and supports the ED, the ED and board work side-by-side to meet the needs of the organization.

The shared leadership between the board of directors and the ED is an important role. The ED serves as the liaison between the board and the staff. While their role is overseen by the board as a collective, the board and ED need to work side-by-side to meet the mission and achieve the strategic priorities for the organization.

For this reason, the work between the ED and the board chair are even more important for short-term and long-term success. *The Board Chair Handbook* is a useful resource for the board chair to consider reviewing and using for reference.

Boards must focus their time on issues of greatest consequence to the organization by reducing time spent reviewing routine reports, verbally communicating minutia of staff and committee work, and redirecting attention to cross-cutting and strategic issues not addressed elsewhere. The board meeting agenda is a great tool for shifting the board's focus and elevating the level of discussion at the board table. To ensure the board does better work, the agenda may require reprogramming, and the board may need to reframe its questions and purpose.

Achieving a healthy shared leadership model is one that is constantly evolving. There are some key elements to continued success when sharing leadership between the board and employees:
- Outline and document clear roles and responsibilities of board and staff
- Understand the right "hat" board members should be wearing in any given situation
- Avoid extremes of board governance as micromanagement and observation
- Encourage a culture of inquiry
- Develop a committee structure that allows board and staff to work side by side
- Participate in regular board self-assessments that examine shared leadership between board and staff

Shared leadership is primarily a practice that needs consistent attention. It is as much art as it is science. By considering strategies to understand and implement strong shared leadership, CPRA will find ongoing success.

STRATEGIC PRIORITY B: COMMUNITY

Objective B1.1: Develop goals and metrics for community satisfaction standards.

Membership is one of the primary revenue sources for CPRA and, therefore, is critical to the organization's sustainability. Supporting the membership is a priority for long-term mission delivery and financial health.

Staff and/or a working group can identify areas of measurement and goals for maintenance or improvement with membership, partners, and vendors throughout the CPRA community. First identifying the metrics to measure will set the foundation for evaluation. Once the areas of measurement have been established, CPRA can develop the tools to use for ongoing evaluation.

CPRA should document annual goals for achievement. These goals may look different across various community groups. Goals may not always include an increase in satisfaction for example but may include continuation or maintenance. Growth and satisfaction increase as goals can put a strain on staff capacity and may not always be realistic. It is important for CPRA to develop goals that are SMART – Specific Measurable Achievable Relevant and Time-Bound.

Objective B1.2: Conduct consistent, annual membership satisfaction survey.

CPRA should conduct a regular, annual community member satisfaction survey with a primary focus on the membership. Using qualitative data research methods is critical for effective evaluation. CPRA may use the membership satisfaction survey from the 2025 strategic planning as a model to build from. Refinements should be made for each survey but maintaining as much consistency as possible is important for gathering longitudinal data.

CPRA should consider either stand-alone surveys or embedded sections in the annual membership survey specifically for sections, interest groups,

partners, and vendors. Learning from sections, interest groups, partners, and vendors reveals where to improve partnerships and shows you value their experiences. This, in turn, may increase investment from sections, interest groups, partners and vendors in CPRA's mission and encourage long-term participation.

The data and the analysis of the data should be used to identify trends, in action planning discussions, and in decision-making. While the staff should be responsible for collecting the information, the board should use the data to make high-level decisions about the organizational direction and oversight.

Objective B1.3: Increase investment in member engagement and experiences.

Using data from the surveys and anecdotal information, the board, staff, sections, interest groups, and more can identify specific areas for improvement for future action plans. For example, the 2025 member satisfaction survey revealed a potential opportunity for increasing board interaction with the CPRA membership. Using this information, the board and staff can brainstorm specific strategies for increasing board interaction with the membership with the goal of increasing membership reporting positive interactions with board members.

A membership committee may be a useful program committee to help with this work. This committee could be a combination of board, staff, and other stakeholders chaired by a staff member. Using data and first-hand knowledge from membership can be a useful way to identify engagement strategies. It also provides a volunteer opportunity for members without having to serve on the board, section, or interest group.

Objective B2.1: Develop consistent and documented information about membership benefits.

During the Discovery Phase of the 2025 strategic planning process, some survey participants expressed a lack of knowledge about certain CPRA membership benefits. To better serve current and prospective members, CPRA staff should document benefits to members that are used throughout the organization and reinforced repeatedly. Keeping a large membership

informed can be a challenging task and one that is important to maintain and grow membership – both in size and in satisfaction with CPRA's programs and services.

Using resources like publications on nonprofit membership development will be helpful in building out the documented membership benefits; there may be benefits to CPRA membership that are not explicit that resources like these can help with. Leveraging a membership committee can also be valuable in identifying, growing, and communicating membership benefits and their impact.

Objective B2.2: Increase communication about engagement opportunities – sections, interest groups, volunteering.

CPRA can help individuals throughout the membership better understand engagement opportunities beyond the annual conference including but not limited to sections, interest groups, committees, and other volunteer opportunities. During the Discovery Phase of 2025 strategic planning, stakeholders expressed limited knowledge about the sections, interest groups, and volunteer opportunities beyond them.

Communicating through in-person and online platforms about the opportunities, their value, and how to get involved will help CPRA help its members understand more of the benefits of being a CPRA member. CPRA should clearly document the roles, expectations, and value of sections and interest groups (this is explored more in Priority C) to make the details easier to communicate.

Use a membership committee to outline the outreach strategies to better leverage individuals through CPRA board and staff. Look to similar statewide and local associations – state parks and other nonprofit associations – as models for how they communicate with their stakeholders. One of the keys to successful communication is to share consistent information ad nauseum. Having as many people as possible to help with consistent messaging across stakeholder groups can only help to increase awareness.

Objective B2.3: Improve community engagement online.

During the Discovery Phase in the 2025 strategic planning, stakeholders reported needing improvement with the "Connected Community" as a member benefit along with other online communications including social media. CPRA can grow their stewardship with current membership and other stakeholders by improving existing online platforms like Connected Community.

CPRA staff (along with a potential membership committee) should identify existing online connections with members, areas for improvement, and how to act steps towards those areas of improvement. For example, when considering increasing social media presence, CPRA may identify the platforms and activities for online engagement. CPRA may develop a social media plan as part of a comprehensive marketing plan using current staff and volunteer resources or hire external consultant(s) to develop a marketing and/or social media plan for implementation. There are contract social media managers that CPRA could also consider.

In improving the online engagement for CPRA stakeholders, the organization should consider its current capacity and where more financial, time, and expert resources are needed to proceed and sustain the outreach effectively.

Objective B3.1: Assess any inclusion limitations related to services, programming and communications.

A consistent challenge for many nonprofit organizations, particularly statewide Colorado nonprofits, is representation and responsiveness to diverse populations. From board service to professional development to interest groups, there are opportunities for any organization to increase diversity in terms awareness, inclusion, and voices in decision-making.

CPRA should gather feedback from member satisfaction surveys, anecdotal experiences through informal conversations, and other methods like focus groups to better understand where the organization has strengths and needs improvement. CPRA's leadership can also participate in continuing learning related to diversity, equity, and inclusion (DEI) such as BoardSource's courses and reading for board members. Increasing inclusivity for any organization begins within, as a cultural shift in understanding and priorities.

It is important that CPRA understands any needed areas for improvement to make shifts in services offered and ways to communicate with stakeholders. Leadership will also learn more about the value – financial and otherwise – from investing in DEI practices throughout the organization. CPRA should avoid creating a stand-alone DEI committee or working group; this action can silo the work that needs to be done throughout any organization.

Objective B3.2: Adjust as needed to provide services with a focus on geographic diversity and engagement.

In Colorado's statewide organizations, geographic inclusivity and diverse representation is a constant challenge. While it is a challenge that any one organization may never solve, it is one that is always important to prioritize.

CPRA can look to other statewide associations in Colorado for examples of successful outreach and engagement with their stakeholders. A combination of staff and CPRA membership from the western slope and eastern plains may create a working group to identify strategies to better engage membership outside the front range.

Staff (with the support for board members as volunteers) may reach out specifically to members outside the Front Range to gather feedback about their experiences and how CPRA can better engage them. This also provides an opportunity for relationship-building and explaining the capacity limitations that have existed in better serving geographically diverse membership.

Once leadership has identified potential areas of change, the next step is to invest the resources to meet capacity needed for implementation. The capacity needs can be met by leveraging existing resources and looking to external support.

Objective B3.3: Prioritize demographic diversity throughout CPRA leadership roles.

CPRA should continue to recruit section leaders, interest group leaders, and board members from a diverse pool of demographics. Gender, age, ethnicity, race, physical ability, professional experience, and geography.

In addition to these demographics, CPRA discussed the importance of a diversity in thinking style as part of the strategic planning retreat. CPRA can use the "Diversity that Builds a Culture of Inquiry" handout (Appendix D) to capture some of the types of diverse thinking. Diverse demographic representation in leadership roles will often enhance diversity in terms of thinking; having individuals with various life experience naturally diversifies how they approach leadership and thinking styles.

When assessing demographic representation, particularly at the board level, avoid using a stand-alone demographic matrix. If using a demographic matrix, be sure to use it as a more comprehensive evaluation process. This helps to avoid tokenizing and filling check boxes in leadership roles but deepens the authentic cultural investment in DEI.

STRATEGIC PRIORITY C: SYSTEMS

Objective C1.1: Assess current financial practices and make changes to meet best practices in nonprofit financial management.

One of the major challenges CPRA reported during the discovery phase is its financial management. From accounting to segregation of duties to budgeting, CPRA has important action needed to repair, rebuild, and reestablish its financial practices. CPRA's financial management is a high priority as leadership needs a clear picture of the financial state of the organization.

To effectively assess and clean up the financials, CPRA may consider putting together a finance committee chaired by the board treasurer and/or hiring an external nonprofit finance expert. There are fractional CFO services, auditors, and accountants who specialize in the nonprofit sector. It is important that any experts have specific knowledge about nonprofit financial management as it is unique from for-profit businesses.

The individuals reviewing the current financial practices for CPRA should examine the following:
- Current auditors and whether there is a need for a new company
- Financial management software (single desktop QuickBooks account) and what would work better for greater accessibility and transparency

- Segregation of duties so that one person is not responsible for opening, signing, depositing, and recording checks which decreases the risk of embezzlement and liability.
- Accounting over the last two years to identify any errors or mismanagement including the chart of accounts; determine if new nonprofit bookkeeper is needed.
- Executive Director's knowledge in financial management and need for support
- If CPRA would benefit from a finance committee (board committee) chaired by the board treasurer and made up of 3 – 5 individuals with some knowledge in nonprofit financial management.

Objective C1.2: Improve board financial oversight and practices.

The board can improve its overall financial oversight by putting system, policies, and practices in place. While the staff and a finance committee should lead CPRA's financial operations, the board is responsible for making sure systems, policies, and practices are in place and the financial resources CPRA needs are available. Participating in ongoing education in nonprofit financial management is a helpful tool in increasing the board's knowledge and enhance its ability to provide oversight.

The board needs to understand the cost of all its programs, services, and operations. Tools like the Measuring Fundraising Effectiveness Initiative provide systems to help understand the true costs of any nonprofit business. As a result, board members will understand the financial viability and sustainability of its work on a macro and micro level. This supports board members' strategic thinking and decision-making. The Matrix Map from *Nonprofit Sustainability* is another tool to help in better understanding the intersection of profitability and impact for CPRA's programs and services.

At least quarterly, or at every board meeting, board members should receive these financial reports: balance sheets (statement of financial position), profit and loss (state of activities), cash flows, budget to actuals, and statement of functional expenses (program costs, administrative costs, fundraising costs). These reports are critical for board members to engage in data-driven decision-making, strategic planning, increase transparency, and risk management. If board members are not receiving these reports, it is

important that the treasurer and board chair examine the reasons why, adjust, and create accountability.

In summary, the board's role in financial oversight includes, but is not limited to:

- Understanding nonprofit financial foundations
- Setting up and monitoring key financial indicators
- Ensuring financial control mechanisms
- Approving the budget
- Overseeing legal obligations
- Understanding roles of the board, treasurer, financial committees, finance staff, and internal controls
- Planning for financial diversity and sustainability

Objective C1.3: Update and develop financial policies and processes.

As part of creating and updating policies, CPRA should prioritize the financial policies and processes for the organization. Here are financial policies worth reviewing or creating as needed:

- Financial controls
- Reserves and endowments
- Finance committee description
- Budgeting
- Financial audits
- Investments
- Board member expense reimbursement
- Capital expenditures
- Compensation of board members
- Executive compensation
- IRS form 990

An accounting policies and procedures manual is an important tool for financial operations. This manual may include some or all the policies listed above along with the details for managing any bookkeeping or accounting work for the organization. This allows a seamless transition between financial operations regardless of staff support. It also creates accountability and checks and balances to protect against unforeseen financial issues.

Financial policies should be reviewed and updated approximately every three years. Sample financial policies from *The Nonprofit Policy Sampler* have been provided in the implementation resources for reference. Please look to the situational analysis report for greater detail on recommended changes to

any audited documents. The staff/finance committee/Treasurer can update the policy using examples and present the draft to the board for voting.

Objective C2.1: Review and evaluate existing CPRA committees, sections, and interest groups.

During the retreat and discovery phases, CPRA learned that there is inconsistency particularly across sections and interest groups. CPRA staff should examine the official and unofficial sections and interest groups to get a clear list and descriptions of each along with the leadership. This will help to identify where improvements need to be made. The first step to making any changes is to take an inventory of the existing structure and practices.

Objective C2.2: Develop, implement, and oversee consistent standards and practices for CPRA sections and interest groups.

Consistent standards, expectations, and processes need to be in place for sustainability and accountability throughout sections and interest groups. This includes a documented organizational structure for sections and committees, standardized descriptions, and memorandums of understanding (MOUs) that outline the specifics of the relationship to CPRA and expectations.

Outlining the responsibilities of leadership for sections and interest groups will help create stronger alignment with expectations. Rotating leadership is a recommended practice to avoid one leader staying in place for too long and limiting others' leadership opportunities. Replacing bylaws and formal voting practices with MOUs, and section expectations may allow for greater shared leadership and participation throughout a section or interest group.

Many of the sections and interest groups expressed interest in the peer learning aspect of sections and peer groups. The CPRA staff may consider ongoing learning for sections and interest groups about peer learning facilitation and the greater field of peer learning. This may enhance the section and interest group experience and investment.

It is also worth creating processes and practices for eliminating sections or interest groups that are underperforming or not demonstrating value connected the CPRA mission.

Objective C2.3: Create board and organizational committee structure.

Committees and councils are a great opportunity to create and structure board and organizational work with board, staff, and volunteers together. Committee or workgroup opportunities leverage the knowledge of a variety of individuals to meet the needs, goals, and vision of CPRA

There are two types of committees: board and organizational. Board committees are those chaired by board members; these committees report to the board directly. For example, a governance or finance committee would be an example of a board committee. Organizational committees are those run by staff and while board members may participate the focus is on tactics that impact day-to-day operations. Many times, these committees are ad hoc and not standing committees.

It is recommended that all board committees are chaired by board members to support communications between committees and the board. For example, finance committees are typically chaired by the Treasurer, and a governance committee is chaired by the Vice Chair.

Except for governance and executive committees, committees can serve as a great opportunity for board and staff to work side-by-side to meet organizational goals and needs, and to establish healthy working relationships. Governance committees should be comprised solely of board members including the ED. We do not recommend using executive committees as they are increasingly seen as a risk for displacing the work of the entire board and can be redundant.

CPRA may consider using a zero-based committee structure to develop its standing committees and working groups over the next few years. A zero-based committee structure allows the organization to reset its committee structure on a regular basis, providing useful flexibility to meet the current needs of the board. The board essentially resets the committee structure back to zero and then answers the question, "What types of committees would best serve our board for the next 2 – 3 years? How can we set those committees up for success?" Here is a sample committee structure:

Standing Committees (board)	Ad hoc Committees (board)	Standing (program)	Ad hoc (program)
•Governance •Finance •Development	•Strategic planning •CEO assessment •Audit	•Services •Marketing	•Campaign

Committees provide a helpful structure for skilled volunteerism and a potential pipeline to board service or continued engagement following board service. *Nonprofit Board Committees* is a useful reference for developing and effectively utilizing a committee structure.

Once CPRA has revised their board and committee structure along with communication practices, they will need to assess said structure and practices on a regular basis. The zero-based committee structure provides the opportunity for the board to review and question what is in best service to the organization.

Another helpful tool in board communications is to use committee reports that summarize the work of the committee to the board and highlight important discussion and voting topics. Committee reports can be sent to the board chair and ED to help develop the agenda before each board meeting and are included in the board meeting packet of pre-reading.

Objective C3.1: Create list of policies and procedures that need to be reviewed, updated, or created.

Policies and procedures play an important role in any organization and serve as a kind of insurance to keep the organization on track and share expectations. These policies need to be revisited on a regular basis to ensure they are both in compliance with best practices and serving the organization in the most comprehensive ways possible.

Below is the list of sample policies as outlined in *The Nonprofit Policy Sampler* (appendix D):

Advisory Councils
Board Chair Job Description
Board Member Agreement
Board Member Application
Board Member Expense Reimbursement
Board Member Fundraising

Board Self-Assessment
Budgeting Policies
Capital Expenditures
Executive Director Job Descriptions
Executive Director Performance Evaluations

Code of Ethics
Committee Chair Job Descriptions
Compensation of Board Members
Complaints
Confidentiality
Conflict of Interest
Crisis Communications
Development Committee
Donor Relations
Electronic Media
Equal Employment Opportunity
Executive Committee
Executive Compensation
Executive Transition
Financial Audits Policy
Financial Committee
Financial Controls
Gift Acceptance
Governance Committee
Investments

IRS Form 990 and 990-PF
Lobbying and Political Activity
Media Relations
Mission
Nepotism
Other Board Officer Job Descriptions
Other Committee Samples
Performance Review
Record Retention and Document
Destruction
Reserves and Endowments
Responsibility for Human Resources
Risk Management
Role of the Board
Sexual Harassment
Sponsorship and Endorsements
Values
Whistleblower Protection
Workplace Environment

CPRA can use the sample rotating policy calendar provided to compare what policies currently exist, which policies need to be updated, and which policies need to be created. The situational analysis report is another resource that can be used to for recommended edits or changes to consider. Emily Davis Consulting also provided recommended edits to CPRA's manual of procedures (MOP) for reference.

Rather than annually reviewing a plethora of policies, consider rotating policies to review; for example, at each board meeting review and approve two or three policies created by and recommended to the board for discussion.

Policy	Status/ Notes	Last Modified	Next Review	Frequency	Committee
Bylaws				3 years	Governance
Board job descriptions				1 year	Governance
Budgeting policy				2 years	Finance
Code of ethics				2 years	Governance
Confidentiality				2 years	Governance
Conflict of interest				2 years	Governance
Document retention				2 years	Governance

Electronic communications				2 years	Marketing
Employee handbook/personnel				1 year	Governance
Equal opportunity employer				1 year	Governance
Finance (budgeting policy)				2 years	Finance
Gift acceptance, sponsorship & endorsement				2 years	Fundraising
Internal controls				2 years	Finance
Nepotism				2 years	Governance
Non-discrimination				2 years	Governance
Operating reserve				2 years	Finance
Whistleblower				2 years	Governance
Grievance process				2 years	Governance
Crisis communications plan				2 years	Marketing
Executive compensation policy				1 year	Executive
Executive transition policy/plan				2 years	Governance
Lobbying/advocacy				2 years	Governance

Per Goal C1, CPRA should prioritize updating financial policies and practices. The organization can determine the urgency needed with other policies and procedures. For example, some organizations will prioritize the creation and revision of policies recommended by Sarbanes-Oxley. The Sarbanes-Oxley Act holds to all publicly traded companies but has best practices for nonprofits to employ; in some states, nonprofit organizations are even obligated to follow the details of policy outlined in The Act.

Objective C3.2: Assign policy review and development to appropriate committee or working group.

The development or revision of a policy does not solely rest on the shoulders of the board. In fact, some policies and procedures are more operational in nature or are related to human resources. The board approves all policies as

part of its fiduciary oversight role but may not be involved in the implementation.

Additionally, CPRA can leverage board and operational committees as well as working groups, where appropriate, to develop and revise policies. For example, financial policies such as internal controls would align best with a finance committee and conflict of interest or bylaws with the governance committee. It is recommended that staff/board work together on the committee level to revise committees, compare with sample standards, and then present to the board for discussion and approval.

Objective C3.3: Develop board book that documents the process for regularly reviewing and updating board policies and procedures.

CPRA has been using a manual of procedures (MOP) to capture the policies and procedures the organization has. As an alternative, the board should consider creating a board manual as a standard document that nonprofits use. This is a distinct document from operations and human resources that staff use and reference. Elements of a board manual or board book include but are not limited to:

- Organizational history
- Articles of incorporation
- Bylaws
- Policies

- Board processes
- Job descriptions and charters
- Agendas
- Strategic plan

Typically, the board manual/board book is maintained by the board secretary. Board members should be able to easily access the board book/board manual and pull-out individual policies and processes to update as needed. The board manual/board book should be referenced in orientation; orientation should not include handing an incoming board member the board manual without any other onboarding activities. The board manual is a living document that serves as a guide for consistent board action and decision-making.

STRATEGIC PRIORITY D: ADVOCACY

Objective D1.1: Identify areas of improvement for marketing to internal and external CPRA community members.

CPRA should look at its current marketing strategies for outreach within the existing membership and in attracting stakeholders such as vendors, members, and other supporters. This review can help CPRA to make educated decisions about any gaps or areas of improvement in its marketing.

A more comprehensive approach is to have a documented marketing plan or strategy that unifies CPRA's marketing, communications, and outreach. This allows for consistent alignment and messaging throughout the organization while also setting tangible goals.

Objective D1.2: Determine resources needed to improve marketing.

CPRA may consider an external marketing consultant, a marketing committee and/or part-time or full-time staff to support a comprehensive marketing approach. Like many of the objectives outlined in this strategic plan, it is important to consider current staff capacity for new initiatives and identify where supplemental support can be used for sustainable success.

Financial considerations are always an important resource for consideration when implementing an objective and budget planning. CPRA will need to examine their financial capacity to pursue additional support for marketing activities and the intersection of that information with the current human resource capacity.

Objective D1.3: Reinforce consistent messaging about CPRA across the organization.

CPRA will need to practice consistent messaging throughout the organization by creating its core message as an organization, programs, and more. A core message is simple, short, and easy to remember. It communicates the essence of why an organization exists. One way many organizations create its core message is through a message mapping exercise. Core messaging is typically distinct from the mission statement or vision statement in that it is a simplified, shorter statement of the organization's work and purpose.

Message mapping is a visual diagram that helps organizations create and communicate a consistent message about their mission, services, and impact. It's a strategic communication technique that can help improve brand credibility, community member experience, and CPRA's positioning in

the community. The core message, however, it is developed, should be easily accessible and used frequently and consistently whenever possible.

Objective D2.1: Develop individual talking points to articulate connection to and importance of CPRA throughout the Colorado community.

Board ambassadorship is an important and often underutilized element of organizational outreach. Community members consistently appreciate and enjoy hearing from and connecting with board members. Board members also play an important role in finding and cultivating community members.

Board members individually and collectively, should be able to articulate their individual reason why they are a part of the CPRA leadership. In the strategic planning retreat, board members used the Motivational Values™ cards to identify one of the many reasons why they serve on the CPRA board, rather than in any other role. This was an activity aimed at board members articulating their "why" and practicing ambassadorship.

Many organizations talk about creating an "elevator pitch" for their board members. This is typically ineffective and inauthentic. Board members often feel like they are asked to memorize a script rather than speak from the heart about their experience. As an alternative, message mapping is a tool that can help board and staff collectively come to a simple phrase or sentence that captures the core of the work being done and how to communicate it.

Objective D2.2: Share mission moments, organizational successes, and individual and team recognition to build stories for improved ambassadorship.

Ambassadorship means being a cheerleader for the mission, vision, and values of the organization rather than a prescriptive set of words to use when interacting with people. CPRA may create recommended talking points to use as ambassadors, message maps, shared stories through board meeting mission moments, and more. Storytelling and personal experiences are the core of connection to the CPRA mission. Building stories of CPRA's qualitative and quantitative impact will only enhance its work and knowledge about that work.

Mission moments are when one board member volunteers to open the board meeting with a positive anecdotal story or experience directly connected to CPRA's mission, programs, or interactions with staff, board or community. A mission moment might be an interaction at the annual conference or a positive experience on a committee or even working through a challenging conflict or topic with a board or staff member. This can be a rotating responsibility for board members; every board member signs up to open a board meeting with their mission moment.

By opening board meetings with a mission moment, it reconnects the board back the mission they are serving in the board meeting, allows board members to practice ambassadorship with a trust group of people, and provides stories for other board members to share or build from. There is no shortage of benefits to using mission moments at that start of board meetings.

Generally nonprofit leadership is always looking for ways to improve or addressing challenges within the organization. It is equally important to share successes and wins. These can be communicated one-on-one, through online outreach, in person at conferences, and more. Highlighting organizational successes build confidence in the organization for everyone.

It is also important to recognize individual successes within the organization. For example, honoring a staff member for a milestone or success with recognition like a lunch is a caring gesture. Acknowledging a board member for an achievement in a board meeting can also be appreciated.

All these activities help to build stories that board and staff can use to enhance their ambassadorship. They also strengthen a positive culture, making it appealing for individuals to stay with the organization and join CPRA.

Objective D2.3: Pursue opportunities to connect one-on-one with CPRA membership virtually and in person.

Investing the time to meet individually with community members will continue to build existing connections and relationships. These efforts can seem inefficient and too time-consuming. However, the reality is that connecting with people one-on-one is truly one of the most effective ways to build trust and propel CPRA forward. Taking the go-slow-to-go-fast approach

may feel somewhat laborious at first but will yield powerful results if pursued consistently over time. CPRA should identify leadership throughout the board and staff who can participate in connecting with community members one-on-one. CPRA can make a list and prioritize those individuals with whom the leadership can start individual outreach from there.

An essential part to engaging stakeholders is to listen. Ask questions and approach any conversation with curiosity. Gathering individual feedback and experiences will direct their decision-making. As in fundraising, the key to successful relationship building is to listen more than speak. Some organizations will conduct listening sessions through focus groups, online surveys, and one-on-one conversations. During the Discovery Phase of strategic planning, Emily Davis Consulting started the listening process through stakeholder surveys and input calls. CPRA may consider conducting annual, quarterly, and ongoing opportunities to listen to stakeholders; this demonstrates the value CPRA has for individuals who are part of the community.

Objective D3.1: Determine opportunities and limitations for statewide advocacy on behalf of CPRA community.

In the Discovery Phase, many stakeholders voiced the importance of CPRA taking an active role in legislative advocacy on behalf of the membership and the CPRA mission. In a turbulent and unsure time as this, financial decisions are made at every level – local, state, and federal - that can potentially affect funding to all organizations. Without legislative advocacy to some degree, CPRA risks not being heard at the proverbial table where decisions are made.

It is important for the CPRA board to understand the legal parameters and limitations of 501c3 organizations around both legislative advocacy and lobbying. Many organizations conflate lobbying, advocacy, and political endorsements. CPRA needs to fully understand the opportunities for action and limitations to any advocacy action to make informed and strategic decisions on behalf of the organization. Organizations like BoardSource and Alliance for Justice are great places to gain knowledge and resources on nonprofit and board engagement in advocacy and lobbying.

The CPRA board members may individually work for organizations that require or limit their engagement in any type of legislative advocacy. Look into these individual limitations and understand the differences between representing an entity a board member is employed by and representing CPRA as a leader on behalf of the community. These are important distinctions and will help CPRA to better understand the role that individual board members and the board as a collective can play in legislative advocacy on behalf of the community.

Finally, look to other statewide associations as models for how they participate in legislative advocacy, particularly when there are individual board limitations because of employment. These organizations do not need to be in a related field to pull examples from. Look to other statewide parks and recreation associations throughout the country as well as statewide organizations throughout the state of Colorado.

Once CPRA has made decisions about its role (or lack thereof) in legislative advocacy, be sure to document what that role, process, and approach is and why that decision was made. This information will help to communicate throughout the community and create documentation for future board and staff members.

Objective D3.2: Consider capacity needs for legislative advocacy.

In pursuing any action related to legislative advocacy, there is likely to be additional support that the staff need to engage effectively. This support can range from part-time or full-time staff to contractors like lobbyists. When hiring lobbyists, nonprofit law allows for lobbying but clearly states what the limitations are. Professional lobbyists know and adhere to these parameters on behalf of their clients.

Many organizations have a standing or ad hoc legislative advocacy committee (an organizational committee) including a combination of staff, board, and community volunteers. These individuals meet and discuss current and upcoming legislation, the organization's position, action steps, communicating with membership, and evaluating its advocacy work. An advocacy committee may also be responsible for providing staff support on publications such as an advocacy toolkit.

There is likely continued education that the board and staff will need to better learn about legislative advocacy and their role on behalf of the CPRA community. CPRA may consider providing education to the larger community through online trainings, conference trainings, and more to help community organizations and individuals learn about the purpose of legislative advocacy and how it may benefit their communities. Investing in this ongoing learning will also be a capacity consideration in terms of time and financial resources.

Objective D3.3: Develop advocacy toolkit for membership.

Many organizations create advocacy toolkits for their stakeholders. These toolkits outline information like what legislative advocacy is, how to contact and engage legislators or representatives, and current legislative bills. Alliance Colorado and Colorado Nonprofit Association both have examples of legislative toolkits and advocacy resources they provide for their members. These include talking points and resources to leave with legislators for every level of engagement – beginner to advanced.

Again, CPRA may need to outsource the advocacy toolkit creation to a working group, committee, or consulting expert to avoid putting more work on the shoulders of staff. However the toolkit is developed, it should be available online for download and promoted throughout the membership. This is an important membership benefit that CPRA can highlight and promote throughout the community whenever possible.

V. IMPLEMENTATION: PUTTING THE PLAN IN ACTION

The essential component to any successful strategic planning process is the implementation of the final plan. This is a consistent challenge in any process - finding ways to keep the strategic plan "alive" and relevant to the organization. The CPRA strategic plan serves as a high-level governance roadmap for the organization. There are techniques that CPRA leadership can apply to help ensure the effective use of the strategic plan. These include:

- Provide a copy of the strategic plan to anyone involved with its implementation (board, employees, committees).
- Schedule a regular time to review the strategic plan with anyone involved with its implementation (e.g. annually at the end of the calendar year).
- Share the plan as part of any orientation process for staff, board, and volunteers.
- Impress upon Board members and staff that the strategic plan is a living document and can be effective only if the strategies, goals, objectives, and activities are integrated as priorities in the organization's work and decisions. Adjustments may need to be made throughout the use of the plan.
- Add the strategic priorities to the top of every board and committee meeting agenda and staff reports as a reminder of the organizational priorities and direction.
- Conduct quarterly reviews or reports of the strategic plan in board meetings. This review should take approximately 10 – 15 minutes, as most of the hands-on work related to activities will be conducted outside the board meetings. "Board champions" (page 51) can be responsible for reporting during these quarterly reviews.
- Assign a board champion to each of the five strategic priorities. The champion is responsible for overseeing the goal's success, rather than executing all the goals. See page 51 for additional details on board champions.
- Include the strategic priorities from the strategic plan in the annual board self-assessment and an ED evaluation.
- Celebrate! Highlight and take time to share successes and forward progress on the plan. Acknowledge individuals who helped accomplish

the objectives and share successes at board meetings, committee meetings, staff meetings, and online.

Board leadership must advocate for and provide oversight to strategic plan implementation. Accountability to the plan and its execution is reliant upon board member investment to ensure success related to the plan's goals and objectives. This plan highlights specific recommended actions, approaches to implementation, and maintenance efforts.

A key concept to keep in mind when it comes to implementing the strategic plan and serving the mission is to think about the image provided here, illustrating the foundations (legs) needed to support the mission (flowers on the table):
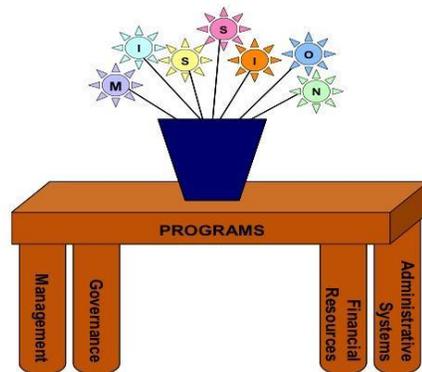
Source: *Nonprofit Lifecycles: Stage-Based Wisdom for Nonprofit Capacity*

Board and Staff Roles in Implementation (Shared Leadership)

Implementation of any strategic plan requires board, staff, and volunteer participation. It is important to define the roles in implementation, knowing that there are always exceptions to every rule.

The **Board** provides oversight of the plan by making sure goals and objectives are being met and by asking strategic, fiduciary, and generative questions. The board ensures that the necessary resources are available for implementation and adjusts the plan as needed. The board members may serve in committee member roles as well working side-by-side with the staff, but not managing the staff. In general, any concerns about staff should be managed through an executive director.

The **ED** serves as the liaison between the board and the staff, providing strategic oversight and reporting to the board while providing operational support to the staff regarding implementation of related plan objectives and tactics. Any concerns about board or committee involvement should be vetted through an ED first, and then an action plan for communication can be appropriately determined.

The **staff** operationalizes the objectives of the plan through tactics they participate in creating. Performance goals and work plans incorporate objectives and tactics from the strategic plan. The ED provides support and supervision of the staff. The staff may provide the board with updates via reports related to strategic priorities and to keep board members informed, better allowing them to serve as ambassadors to the organization.

CPRA **committees** are an excellent place to bring the board members, staff, and non-board volunteers together to meet the objectives and tactics of various goals and strategic priorities. Ideally, each committee is chaired by a board member to assist with communication between committees and the board. The committees may provide the board with reports to help summarize the work of the committee and connection to strategic priorities. It is also recommended that committees use work plans to stay accountable to their forward progress.

A visual representation of strategic plan implementation in terms of altitude is provided here:
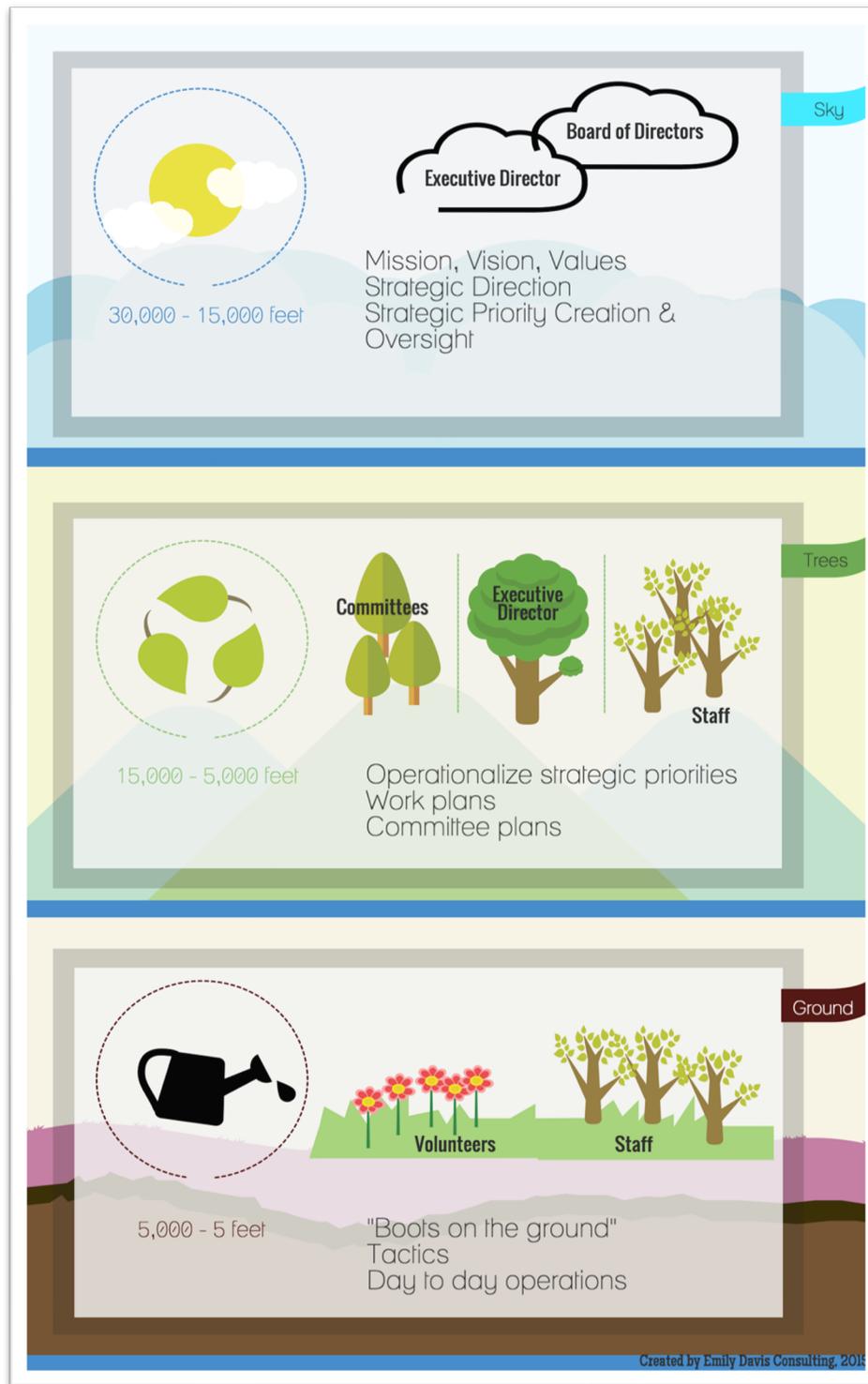
Board members should review the **implementation dashboard** (Appendix B) frequently and highlight the strategic goals on every board meeting agenda. This practice aligns board decision-making with the strategic plan. The dashboard is a quick reference guide for the larger strategic plan narrative that includes strategic priorities, goals, objectives, tactics,

timelines, resources, and responsible parties; it may be helpful to share this document with funders and other interested parties.

Committees and task forces may develop their own **work plans** that integrate the strategic plan goals, objectives, and action items to keep focus and accountability with volunteers and staff alike. **Committee reports** can provide useful information about committees' progress while keeping other Board members informed without using valuable board time "reporting out." Staying connected to and reminded of these organizational strategies will assist the board in using and implementing the resources included in the strategic plan.

Board "champions" will need to be identified for each strategy to lead the charge in ensuring accountability to the plan. Board champions are not solely responsible for implementing priorities. Rather, they are asked to ensure:
- The strategy and its related goals and objectives remain a priority for the organization.
- Tracking of progress on the strategy by asking pertinent questions and providing updates at and between board meetings.
- Delegation of board activities related to the strategy to ensure implementation (e.g. chair a committee).

Board champions provide oversight for a strategic priority by staying in communication with committee chairs, board members, staff, and consultants about the progress of goals and objectives. Three ways to communicate with the entire board about strategic priorities' progress include:
- Monthly or quarterly written board champion reports.
- Monthly or quarterly verbal reporting out during board meetings about progress or challenges related to the strategic priority. Board champion reports can be useful in structuring the elements of this reporting out.
- Rotation of reporting re: each strategic priority. In other words, the board hears one update on one strategic priority each month.
- The board champions can use the implementation dashboard (Appendix B) to keep track and keep the board informed of any progress or changes related to the strategic priority.

Deadlines

Suggested completion deadlines for objectives are noted in the plan narrative, and appendix B (implementation dashboard). The deadlines listed are initial recommendations and CPRA should adjust the deadlines based on the organizational calendar of activities and capacity. The deadlines are a recommendation of when an objective should be completed, however meeting an objective sooner (such as creating structure for the ED) is always possible. CPRA board and staff will ultimately be the best judges of ideal timeline expectations.

With approval of the 2026 Strategic Plan, the CPRA Board of Directors should address the priorities and goals outlined in the narrative, snapshot, and dashboard. Annually (e.g. at the close of the calendar year), the board should review the strategic plan narrative, snapshot, and dashboard to assess accomplishments from the past year and adjust upcoming priorities, goals, and objectives as needed.

Next Steps

The next steps for the board will be to review the strategic plan and the implementation dashboard. The board and staff will need to determine specific tactics related to meeting an objective. Additionally, the board and ED will need to:

- ❏ Add/review/edit tactics under each objective.
- ❏ Review and finalize timelines and responsible priorities for strategic planning goals, objectives and identify tactics.
- ❏ Identify specific qualitative and/or quantitative metrics (success outcomes) related to objectives where possible.
- ❏ Identify board champion for each strategic priority (see definition above).
- ❏ Determine reporting systems for strategic planning implementation (see samples in appendices).
- ❏ Review and leverage resources and templates provided in appendices.
- ❏ Decide on review frequency and revision process for strategic plan.
- ❏ Discuss organizational structure needed such as committees and external expertise for implementation.
- ❏ Share plan with staff.

The assessment, facilitation, and documentation provided will help organizational leadership make the next steps with strategic plan implementation. However, there is work still to be done to make the specifics of the plan possible and to keep the plan living. With great leadership, planning, and accountability, success is always possible!

RESOURCES

BoardSource
The Board Building Cycle
Nonprofit Board Committees
Roberta's Rules of Order
Governance as Leadership
Nonprofit Policy Sampler
Nonprofit Sustainability
The Development Plan
Association of Fundraising Professionals
Measuring Fundraising Effectiveness Initiative
The Networked Nonprofit
Measuring the Networked Nonprofit
The Nonprofit Marketing Guide
Moving from the Elevator Pitch to Ambassadorship
Barefoot PR
The Great Nonprofit Evaluation Reboot
Handbook of Practical Program Evaluation
Assessing and Supporting Your Executive director: A BoardSource Toolkit
Assessment of the Executive Director (ACE)
Executive director Succession Planning: Essential Guidance for Boards and EDs
Supporting Your Executive Director: The Collection
Govern More, Manage Less: Harnessing the Power of Your Nonprofit Board
Building Nonprofit Capacity: A Guide to Managing Change Through Organizational Lifecycles
Effective Leadership for Nonprofit Organizations: How Executive Directors and Boards Work Together
Unlocking the Magic: The Art and Science of Shared Leadership