EVENT GARDE

From Sticky Walls to Strategic Wins: Event Garde's Hands-On Approach to Strategic Planning


Strategic Planning White Paper

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Executive Summary

Not all strategic plans, or the processes used to develop them, are created equal. At Event Garde, we use the [Technology of Participation (ToP) Strategic Planning](#) method to combine bold vision, practical action, and authentic stakeholder engagement. This dynamic, participatory approach ensures that every voice is heard, and that the final strategy reflects shared priorities and values. Over a span of typically six months, through several interactive sessions, the ToP method doesn't just create a plan; it builds alignment, ownership, and momentum to drive meaningful change.

The ToP Strategic Planning method is a structured, yet flexible process designed to create actionable, results-driven strategies. Event Garde's approach consists of five key phases:
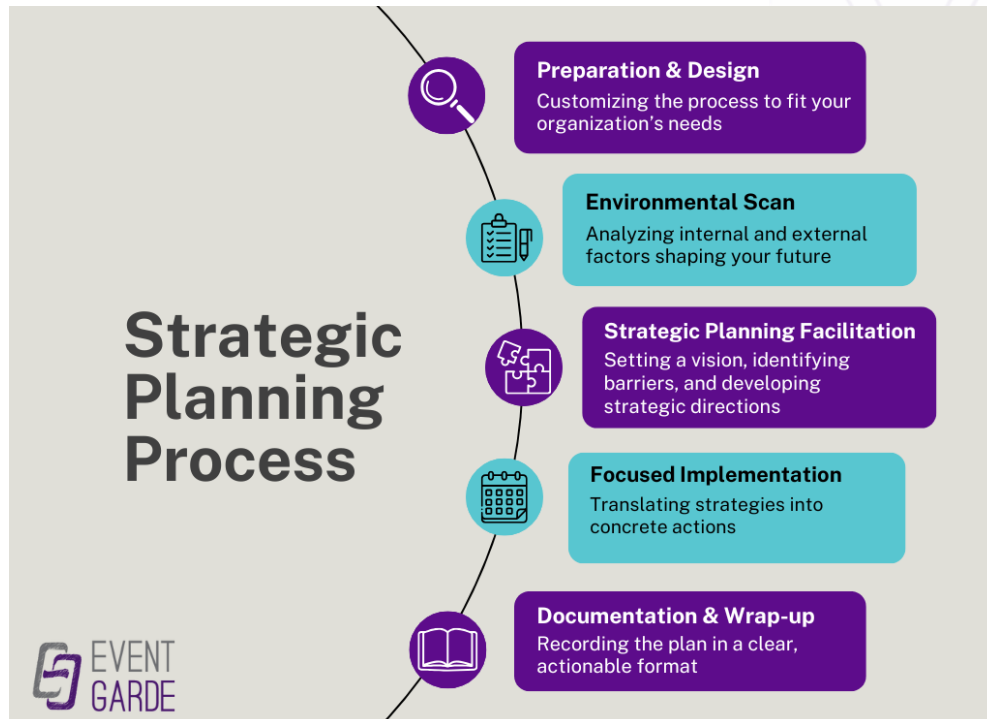
In today's fast-moving world, shaped by economic shifts, technological advancements, and evolving societal needs, organizations must be agile, responsive, and future-focused. A strategic plan is more than a document, it's a roadmap for navigating complexity, making informed decisions, and maximizing impact. **ToP Strategic Planning helps organizations do just that by fostering collaboration, generating clarity, and ensuring long-term commitment to action.**

This white paper provides a clear overview of the **what, why, and how** of the ToP Strategic Planning process. After reading it, you will:

- **Understand** the core principles of the ToP approach and how it differs from traditional strategic planning methods.
- **Gain insights** into its unique, participatory framework that fosters deeper engagement, consensus-building, and lasting commitment.
- **Learn** about the key components of the process and how they create a structured, yet flexible roadmap for success.

By leveraging the ToP Strategic Planning methodology, organizations can expect **stronger alignment, more effective decision-making, and strategies that truly reflect their stakeholders' needs.** Whether you're looking to refine your vision, adapt to change, or set a new course for long-term success, this method provides the tools to get you there—together.

Introduction & Background

Getting to the Bottom of ToP

The Technology of Participation (ToP) is a facilitation methodology developed by the [Institute of Cultural Affairs](#) (ICA) to tap into the insight and creativity of groups to build consensus, drive action, and foster lasting change. Its roots trace back to the 1960s in Chicago, where the Ecumenical Institute and Faith & Life Community sought to empower communities through participatory methods. As their work expanded, they recognized the value of structured group processes that honored every voice. In 1973, ICA was formally incorporated as a secular, international organization, emphasizing local wisdom, asset-based development, and collective responsibility over dependency on external solutions.

Throughout the 1970s and 1980s, ICA's work expanded globally, applying its participatory approaches in diverse cultural contexts. The organization decentralized in the 1980s, resulting in the formation of over 30 autonomous national ICAs committed to the shared vision and core methods. ToP methods evolved through this international fieldwork and continue to support a wide range of sectors, including nonprofits, government agencies, trade associations, and community-based initiatives.

In the U.S., ToP offers a robust training program with more than 13 courses, available both in-person and online. A national network of [ToP Trainers](#) and [Certified ToP Facilitators](#) supports ongoing learning and practice. The [ToP Network](#) connects practitioners across the country to share tools, deepen skills, and foster a thriving community of participatory leaders.

ToP facilitators help groups think, talk, and work together by providing a structured method to:

- Recognize and honor the contribution of all participants
- Deal with more data in less time
- Pool individual contributions into larger, more inclusive patterns
- Use diversity as an asset while minimizing polarization and conflict

Source: https://www.ica-usa.org/history.html

Foundational Values of ToP

The ToP approach to strategic planning is based on the following foundational values of ToP:

Value	Description
Inclusive Participation	Invite and sustain the participation of all members of a group. Each person holds a piece of the puzzle, and each person's insights help to create a whole picture.
Teamwork & Collaboration	Foster a genuine sense of collegiality among members of the group to get a task done in the most effective, efficient, and economical way.
Individual & Group Creativity	Bring out each person's rational and intuitive capacities. By encouraging a dialogue between the head and the heart, people experience the magic of group creativity.
Action & Ownership	Position the group to take action on decisions owned and supported by members of the group.
Reflection & Learning	Confirm individual and group resolve and ensure full appreciation of the value and importance of consensus and collective action.

Event Garde's facilitators are skilled in upholding ToP values to manage group dynamics and address conflicts to foster collaboration. These values drive better decision-making and more effective strategy implementation.

The Landscape of Planning

There are **four essential planning types** and each one offers a unique opportunity for organizational success. Following is an overview of these four planning types:

- **Foresight Planning** (5–10 years) focuses on future-oriented thinking, using tools like environmental scanning and analysis of **drivers of change** to anticipate long-term opportunities and challenges. It helps organizations prepare for what's coming and position themselves strategically.
- **Strategic Planning** (2–5 years) zeroes in on identifying critical focus areas by analyzing trends and emerging initiatives. It provides direction for resource allocation and action over the midterm horizon.

- **Operational Planning** (1 year) breaks strategy into actionable steps, setting multiple goals and outlining a linear work plan to carry out core functions and keep the organization running smoothly.
- **Project Planning** (less than 1 year) is task-specific, ensuring the successful implementation of individual events, initiatives, or deliverables. It brings clarity and structure to short-term objectives, often contributing to broader strategic or operational goals.

Together, these planning types create a comprehensive framework that supports both long-range visioning and immediate implementation.

Strategic Planning 101

Strategic planning is one of the [planning types](#) that serves a distinct purpose in ensuring the vitality and growth of an organization. Strategic planning bridges the gap between vision and implementation, providing a roadmap for organizations to achieve their long-term objectives. Typically focused on a two-to-five-year timeline, strategic planning involves conducting environmental scans, analyzing trends, and identifying new initiatives critical to organizational success. Key questions such as, "What are critical areas where we need to put our actions and /or resources over this period of time?" guide strategic planners in prioritizing initiatives that align with the organization's mission, vision, and values.

Strategic planning ensures that resources are allocated effectively toward initiatives that support the organization's strategic priorities. By regularly reviewing and adjusting strategic plans in response to changing circumstances, organizations can remain agile and adaptable in dynamic environments. Strategic planning requires organizations to balance short-term and long-term goals by striking the right balance between addressing immediate needs and pursuing long-term objectives through careful consideration and prioritization. The work does not end once the strategic plan is finalized. Organizations need to translate strategic plans into actionable initiatives through strong leadership, clear communication, and effective change management.

A strategic plan is often misunderstood. It is not the same as an operations plan or a record of routine, business-as-usual activities. Nor is it a vague set of aspirations or an overwhelming collection of initiatives labeled "strategic" but lacking clear purpose. A strong strategic plan avoids being a compilation of every department's wish list and instead focuses on priorities that are both actionable and measurable. Without a clear focus and a realistic implementation strategy, what might be called a "strategic plan" risks becoming an impractical document that fails to drive meaningful change.

The current landscape has made strategic planning more critical than ever for organizations striving to stay relevant in a rapidly evolving world. The aftermath of COVID-19, combined with ongoing economic, political, technological, and societal shifts, has created unprecedented change across industries. Organizations must navigate new challenges, seize emerging opportunities, and adapt to dynamic market conditions. Strategic planning provides the framework to chart a clear course for the future, aligning resources and initiatives with evolving priorities while ensuring agility to respond effectively to uncertainties and disruptions.

Key Features of the ToP Strategic Planning Approach

ToP Strategic Planning includes components of traditional planning approaches within a cohesive participatory process to help an organization make choices related to its overall organizational purpose. ToP Strategic Planning quickly moves a group from its vision to its agreed-upon actions.

Collaborative vs. Top-Down Approach

While other processes rely on leaders to make the decisions, ToP uses structured participation to enable deeper levels of commitment and greater capacity for sharing wisdom and owning decisions arrived at collectively.

Names the Blocks & Barriers

A unique hallmark of the ToP methodology is the intentional pause to name the underlying contradictions, deeply rooted systemic patterns, cultural norms, or mindsets, that block progress, offering a powerful and often overlooked bridge between aspirational visioning and actionable strategy.

Focuses on Implementation

The ToP Strategic Planning process ensures a seamless transition from planning to action by breaking down long-term goals into specific, actionable steps. It emphasizes clarity and accountability by defining priorities, assigning roles, and establishing timelines to maintain momentum. By fostering alignment and consensus, the process creates a plan that is both practical and inspiring, empowering groups to act immediately and with confidence.

Embeds Values in the Planning Process

This approach embeds core values such as collaboration, inclusion, and shared ownership into every stage of planning, ensuring these principles guide both decision-making and implementation. By prioritizing participation and diverse perspectives, it equips groups to be more agile in responding to challenges and opportunities, fostering creativity in how strategies are carried out. This value-driven approach encourages broad-based initiative and responsibility, as team members feel empowered and accountable for translating the shared vision into action.

Prioritizes Authentic Interaction

This process is highly interactive, combining individual reflection with both small and large group collaboration to engage participants fully. Using tools like the "sticky wall" in person or Google Slides or Miro virtually, it visually organizes ideas in real time, ensuring all voices are heard and fostering creativity, consensus, and collective ownership of the final plan. For example, when brainstorming, participants write their idea on individual cards, then work in small groups to discuss which ideas should be placed on the sticky wall or virtual whiteboard. Then they work together to cluster similar ideas, revealing common themes and shared priorities. The highly participatory nature of ToP ensures that every individual, from front-line staff to leadership, sees their contributions reflected in the final plan, increasing buy-in and commitment to implementation.

By ensuring realistic outcomes and remaining responsive to an organization's evolving needs, ToP Strategic Planning provides a structured yet flexible framework for effective and sustainable planning. It stands out as an inclusive, dynamic, and participatory approach that harnesses diverse perspectives, engages group energy, and honors creativity.

Organizational Readiness

Before embarking on a strategic planning process, it's essential for organizations to assess their readiness. A successful planning engagement requires more than just a desire for a new roadmap—it calls for clarity, commitment, and capacity. Organizations that experience the most value from strategic planning are those that enter the process with aligned leadership, a shared sense of urgency, and an openness to change.

One of the strongest indicators of readiness is a clear understanding of why the organization is pursuing strategic planning at this moment in time. Whether driven by internal transitions, external pressures, or a natural planning cycle, having a shared rationale helps set the tone for engagement and commitment. Organizations should also be ready to make time and space for the process, not just logistically, but mentally and emotionally. Strategic planning requires focused energy and sustained participation from a range of stakeholders across the organization.

Equally important is a willingness to be honest and transparent about the organization's current reality. This includes surfacing tensions, acknowledging gaps, and inviting diverse perspectives into the conversation. Organizations must also be prepared to act on what emerges from the process, not just producing a plan but following through on implementation. When leadership teams are aligned, decision-makers are engaged, and the organization has the bandwidth to support planning and follow-through, it's a strong sign that the conditions are right for a successful strategic planning initiative.

The Five-Part Event Garde Strategic Planning Process

Using the ToP Strategic Planning methodology as our foundation, Event Garde has developed a process that is both structured and adaptable to meet the unique needs of each strategic planning engagement. We partner closely with client organizations to complete the five key phases of the process, which typically unfolds over a six-month period.

1. Preparation & Design

The strategic planning process begins with a structured onboarding phase designed to set a strong foundation for the work ahead. This includes a welcome and orientation sent via email, outlining next steps such as sharing relevant organizational materials, scheduling key meetings, and confirming logistics for the in-person strategy session. This early communication ensures clarity, alignment, and momentum as the process gets underway.

Following the initial outreach, a virtual kickoff session is held with a small group of key stakeholders, typically senior staff and key leaders. This session creates space for introductions, clarifies the purpose and readiness for strategic planning, and reviews foundational documents such as mission, vision, and past plans. It also includes the co-creation of a strategic planning focus question and outlines the environmental scan process. The group previews future phases of the process, including stakeholder engagement, the in-person planning session, and implementation planning, ending with a review of next steps to maintain progress and engagement.

2. Environmental Scan & Virtual Orientation

Event Garde believes every strategic planning process should begin with an environmental scan. We often do this via stakeholder survey broken up into three distinct time segments: past, present, and future. Asking a couple of questions in each section (at least one focused on strengths and one focused on opportunities/weaknesses), we can quickly and easily surface key organizational milestones. The balance of the survey gathers stakeholders' perspectives on organization value, engagement, mission/vision alignment, strategic priorities, benefits, and external perceptions to inform its upcoming strategic planning process.

Rather than defaulting to just the board, for example, this is an ideal time for organizations to consider a broader range of internal and external stakeholders who can offer valuable perspectives. Including diverse voices in the process not only promotes equity but also creates a richer, more inclusive foundation for strategic planning. A stakeholder mapping exercise can help identify these voices and ensure they are intentionally and thoughtfully engaged.
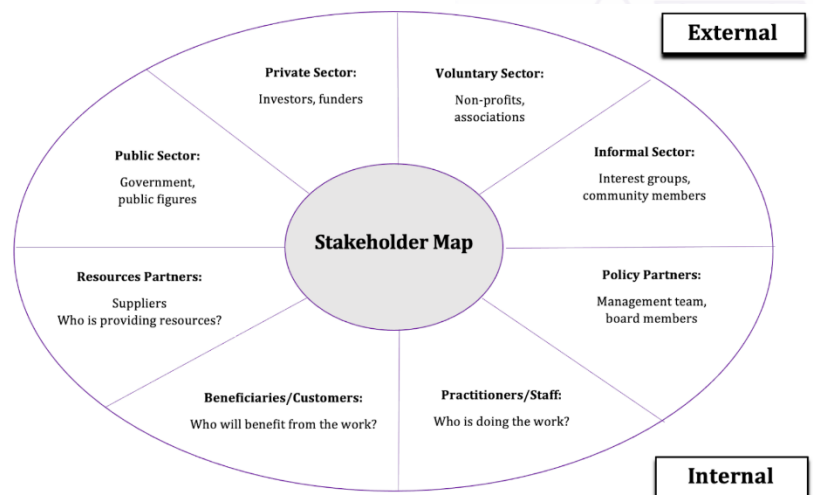
Data is then reviewed and insights aggregated into a top-level summary. The themes and trends outlined in this summary are used in concert with a discussion of the organization's key statements (e.g., mission, vision, values, DEIB) to ground the group's planning efforts.

A virtual orientation session is then held for all stakeholders participating in the primary strategic planning session, typically involving 20 to 30 individuals. This session sets the stage for meaningful engagement by building shared understanding of the planning process, clarifying roles, and establishing community agreements. Participants review key organizational documents and data, as well as engage in a breakout-room environmental scan exercise called a *strategic juncture analysis*. The session concludes with a review of logistics and next steps to ensure everyone is prepared for the strategic planning facilitation.
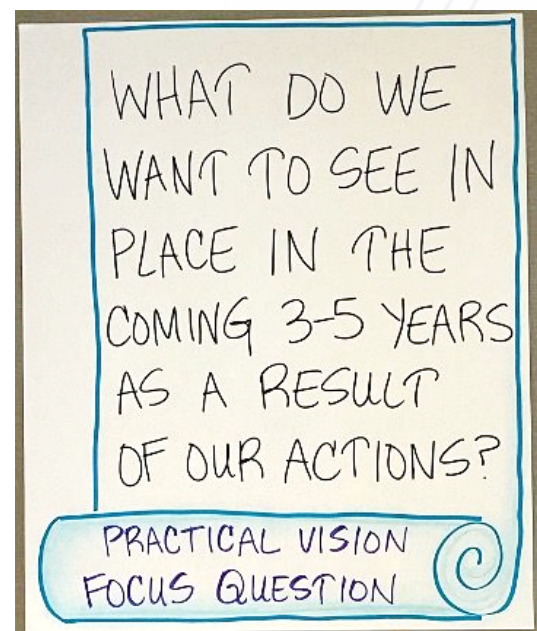
3. Strategic Planning Facilitation

This strategic planning facilitation can be conducted in person over one to two days using sticky walls or virtually across three to four sessions using virtual whiteboards on Miro or Google Slides. Both formats follow the same core methodology and are designed to support inclusive, high-participation engagement with tools adapted to fit the environment.

Opening (30-45 minutes)
- At the start of the day, Event Garde will set the tone for an inclusive, productive, and engaging strategic planning experience. The session will open with brief remarks from an organizational leader, followed by a warm welcome from the facilitator, who will acknowledge participants' time, commitment, and the importance of their contributions. The facilitator will introduce themselves and provide context for the structured, participatory process rooted in the ToP methodology. Participants will create tent cards with their names and pronouns as part of building an inclusive environment.
- From there, the group will review the day's aims, community agreements, and planning framework, including the overarching focus question and the four core workshop components: Practical Vision, Underlying Contradictions, Strategic Directions, and Focused Implementation. The facilitator will provide an overview of logistics, participation expectations, and accessibility considerations. Using visuals such as flipcharts and sticky walls (or virtual equivalents), participants will orient themselves to the planning journey ahead, laying the groundwork for full engagement and a successful co-creation of the strategic plan.
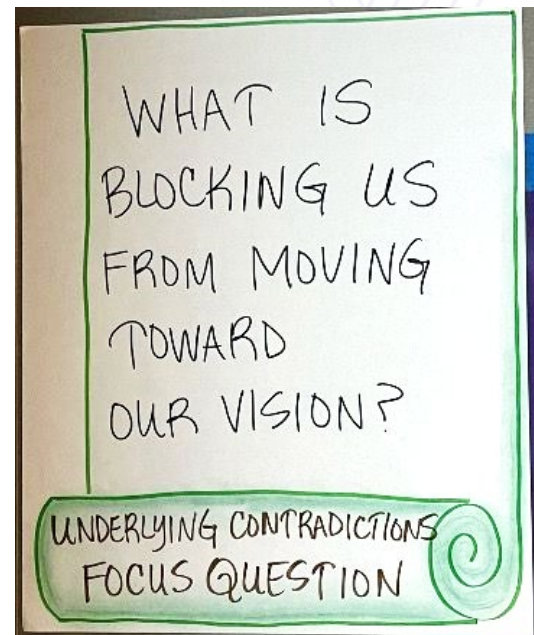
Practical Vision (2 hours)
- In this step, stakeholders work to identify the current vision of the organization. They explore what they hope to see in place in the next two to five years because of their efforts. The vision becomes the foundation upon which the rest of the strategic planning process builds.
- We're in search of a vision that's positive, hopeful, and practical. This is not just blue-sky visioning where you toss out any idea. Rather, these are proposed accomplishments that members, leaders, and staff desire to see in place. And although the vision should remain relatively fixed over a pre-determined period, this process/tool is flexible enough to make periodic tweaks and changes, as needed.

WHAT DO WE WANT TO SEE IN PLACE IN THE COMING 3-5 YEARS AS A RESULT OF OUR ACTIONS?

PRACTICAL VISION FOCUS QUESTION

- We'll identify five to seven practical accomplishments and supporting examples that are more detailed than any existing vision statement and, most importantly, is responsive to the current environment.

Underlying Contradictions (2 hours)

- An important component of strategic planning, and one often overlooked, is understanding what barriers (both real and perceived) may get in the way of achieving your stated vision. This step in the process is a unique approach that explores the possible self-imposed blocks and root causes of those blocks to fully prepare to mitigate them moving forward.
- Here, we are looking for the patterns, attitudes, structures, and blocks that we encounter in our day-to-day work. We're looking for what's there, not what's missing. It's like working in your garden, watering the plants, and the water running from the hose suddenly stops. You don't just stare at the hose and shout, "There's no water" (signaling a lack of water). You turn to check if there is a kink in the hose, if someone stepped on it, or if someone turned off the water. In this exercise, we're looking for the kinks or blocks rather than announcing what's not there.
- This workshop concludes by identifying five to seven blocks or barriers, typically what is the block and what is it blocking, preventing the group from moving toward its stated vision.

Strategic Directions (2 hours)

- In this step, stakeholders identify the practical actions that will deal with the identified contradictions and move the organization toward its vision. Groups identify a range of creative and strategic actions that will inform focused strategies. With the vision in mind, and being prepared to mitigate what might prevent success, three to four strategies, initiatives, or pillars are identified that will carry the organization forward.
- Here, we want to be aware of the negative implications of not changing; what it means to think proactively; how to balance both conservative and venturesome thinking; explore what it means to be both catalytic and persistent; the importance of incremental change; what it looks like to be inclusive; and how to be open and alert to future opportunities.
- This will conclude the strategy portion of the process. Those who like to dig into the details, who will do what by when, will likely leave feeling unsatisfied. But this will occur in Phase 4: Focused Implementation.
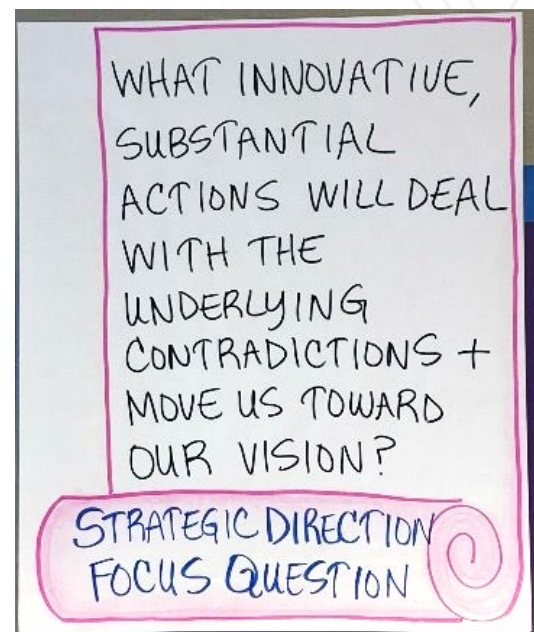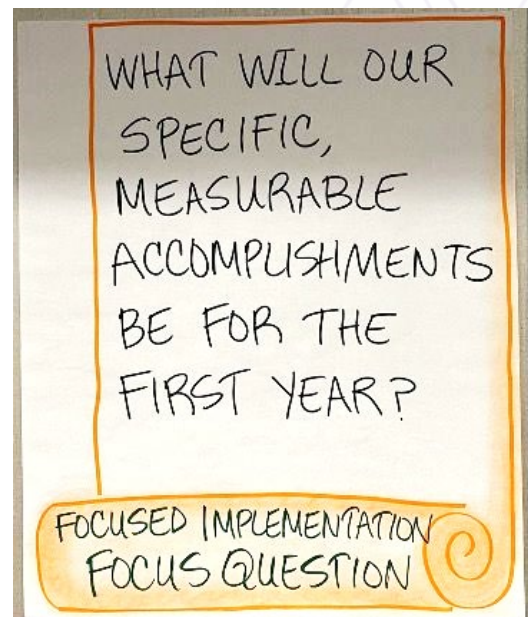
Wrap-Up (30-45 minutes)

- Finally, Event Garde will guide a thoughtful and celebratory close to the strategic planning session. The facilitator will begin by expressing gratitude for participants' time, energy, and contributions, acknowledging the collective effort that resulted in a strong strategic foundation for the next two to five years. A final go-around question invites each participant to share a one-word reflection on how they're feeling, offering a simple yet powerful way to mark the moment and honor the group's shared experience.

- Before concluding, the facilitator will provide an overview of next steps, including the documentation process and upcoming focused implementation sessions. These follow-up sessions will translate the strategic framework into concrete first-year accomplishments, timelines, assignments, and 90-day action steps to ensure early progress and momentum. The group will briefly discuss the concept of the [implementation gap](#) and explore ways to maintain alignment between strategy and implementation. Participants will have the opportunity to ask final questions, share feedback, and hear brief closing remarks from an organizational leader. The session will wrap up with a group photo to commemorate the day and recognize the community of people who shaped the plan.

4. Focused Implementation

Most strategic planning consultants end with the strategy. Once the group has navigated the facilitated discussion (either in-person or remotely), the consultant may or may not package the strategy work into a final report with photos and consensus decisions. Event Garde is unique, though. We know the most difficult work begins once the strategy ends. So, after the practical vision, underlying contradictions, and strategic directions are documented and shared, Event Garde introduces the group to focused implementation (sometimes known as operational planning). This is often where groups struggle on their own, because they don't know how to operationalize the strategic plan. And then before you know it, six to 12 months have passed, and no substantive progress has been made.

WHAT WILL OUR SPECIFIC, MEASURABLE ACCOMPLISHMENTS BE FOR THE FIRST YEAR?

FOCUSED IMPLEMENTATION FOCUS QUESTION

It's important to note that Event Garde begins, but does not complete, the focused implementation process with groups. And, honestly, there's no "perfect" transition point. Focused implementation is ongoing (over the course of a year or more), requires the team to integrate new work into their daily operations, and must be constantly monitored/updated based upon tasks completed, challenges encountered, and course corrections implemented. But we feel that introducing the focused implementation process and associated tools helps to empower groups in owning their operations plan while also creating buy-in, commitment, and accountability. This is especially true if the group's not been through strategic planning before or it's been a while since the last plan was implemented.

Typically drafted during a single, four-hour in-person session or two, two-hour Zoom meetings, Event Garde's focused implementation typically ends with a draft of the following four items:

- **First-year accomplishments** — designed to record the positive and negative factors from the current reality that will affect implementation, the measurable accomplishments that are desired in the coming 12 months, and the measurable outcomes that will indicate success two years from now.
- **First-year calendar and assignments** — the first-year accomplishments from the previous step are mapped out over a period of 12 months, additional milestones are added to fill in identified gaps, and assignments are made among team members.

- **90-day implementation steps** — an incredibly detailed game plan (or sprint) created every 90 days outlining the specifics for how the work is to be completed. At the end of 90 days, team members should reconvene and review what's completed. New 90-day implementation steps should then be drafted to account for outstanding tasks, as well as the next quarter's actions.
- **90-day priorities** — many teams find it helpful to have a visual representation of the six most important actions to be completed each 90 days. This helps to focus the team's attention on key priorities, while also funnelling limited resources into the most catalytic actions that could unblock subsequent tasks.

5. Project Management, Documentation & Check-in

Event Garde will provide comprehensive project management support throughout the strategic planning initiative, ensuring all tasks, milestones, and timelines are clearly defined, monitored, and completed. Our team will coordinate logistics, track deliverables, and maintain clear communication to keep the process organized, efficient, and on schedule.

Throughout the strategic planning journey, Event Garde will:
- Share photos or screenshots of all flipcharts and sticky wall content
- Transcribe key outputs from the sessions, as needed
- Draft and distribute documentation following each facilitation milestone
- Provide links to relevant tools and resources that support ongoing implementation

In addition, Event Garde typically schedules a one-time check-in with the leadership team approximately 90 days after the conclusion of the planning process. This session is designed to review progress, celebrate early wins, identify any roadblocks, and course correct as needed—ensuring momentum isn't lost once the planning sessions conclude. For organizations seeking continued partnership, Event Garde also offers optional 90-day coaching extensions (at an additional cost), tailored to help teams build internal systems and sustain the energy and accountability necessary to move the strategic plan from theory into meaningful action.

# Planning with Intention: Customization, Implementation & Accountability

Personalized Planning with Purpose

While the ToP Strategic Planning process typically follows a structured sequence, each section can be tailored to reflect an organization's unique needs and circumstances. From crafting a vision that resonates with the organization's culture to defining focus questions that address specific challenges, the process is designed to be flexible and adaptive. Stakeholder engagement can be customized to ensure inclusivity, and environmental scans can be shaped to highlight relevant data and trends specific to the organization's industry or mission. Even the implementation phase can be adjusted to align with the organization's capacity, timelines, and resources. This adaptability ensures that the ToP process not only provides a clear roadmap but also genuinely aligns with the organization's goals and values.

Minding the Implementation Gap

As you begin to develop a timeline for your strategic planning initiative, it's important to consider not only the design of the process itself but also what comes after—the transition from planning to implementation. This is where many organizations encounter what's known as the _implementation gap_: the space between having a strategic plan on paper and actually putting it into action. Even the most thoughtful, collaborative planning

process can fall short if there isn't a realistic and well-supported path for implementation. By building this awareness into your timeline from the start, you can better anticipate common obstacles and design supports, such as early wins, clear accountability structures, and regular check-ins, that help carry your momentum forward once the planning sessions conclude.
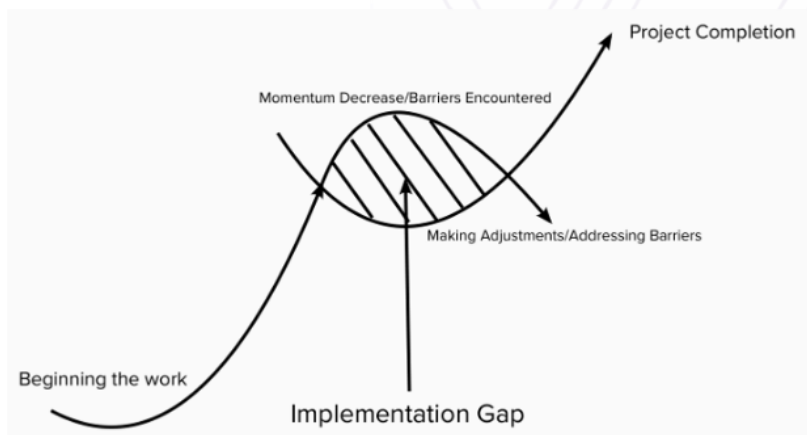
From Kickoff to Check-In: A Sample Timeline

The full process typically spans about six months (nine months if you count the 90-day check-in). The following table depicts a typical strategic planning timeline (subject to change based upon the organization's responsiveness and customizable based upon organizational need/desired deliverable milestones). A more precise project timeline is drafted in collaboration with the client once an agreement is signed.

Timeline	Description
Month 1	• Send key contact onboarding via email • Refine and finalize key milestone dates and the division of roles/responsibilities
Month 2	• Virtual kickoff session with key stakeholders • Begin environmental scanning activities
Month 3	• Complete environmental scanning activities • Host virtual orientation for key stakeholders
Month 4	• Host primary strategic planning facilitation • Event Garde prepares/delivers primary documentation • Focused implementation virtual orientation with key stakeholders
Month 5	• Client finishes focused implementation prep • First two-hour virtual focused implementation session is held
Month 6	• Second two-hour virtual focused implementation session is held • Event Garde's work concludes
Month 9	• Host virtual check-in for key leadership team

Mutual Measures of Success

To ensure alignment, transparency, and shared accountability, the following mutual measures of success serve as benchmarks for a productive and impactful strategic planning experience with Event Garde:

Engaging Virtual Sessions

Event Garde leads informative and interactive virtual sessions, each with a clear agenda and facilitated by a trained professional. Sessions leverage tools like Zoom, Google Slides, or Miro to promote active participation, connection, and clarity. Participants engage with the content, each other, and the facilitator—and leave each session with clear documentation and next steps.

Highly Interactive Facilitation

Whether in-person or virtual, the primary strategic planning facilitation features a variety of engagement formats including individual reflection, small group collaboration, and large group consensus-building. Participants physically interact with materials, such as placing ideas on sticky walls or virtual whiteboards, to visually organize and connect key themes. Facilitators create a balanced space where all voices are heard and diverse perspectives are both welcomed and valued.

Shared Outcomes & Ongoing Support

By the conclusion of the process, organizations can expect a clear vision for the future informed by data and stakeholder input, a practical operational plan to guide implementation, and a collaborative and responsive consulting partnership. Ongoing communication and timely follow-up ensures continued alignment and momentum.

Setting the Stage for an Effective Engagement

Considerations for In-person vs. Virtual Meetings
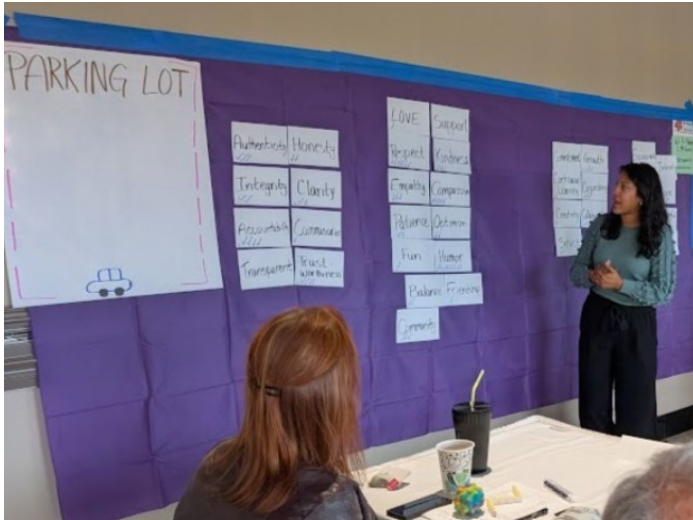
When deciding between in-person and virtual formats for the primary seven to eight hours of strategic planning facilitation, organizations should weigh the unique advantages and potential challenges of each approach. In-person sessions often foster stronger connection, higher engagement, and more dynamic collaboration, making them especially effective for activities that benefit from creative energy, trust-building, and collective momentum. However, they typically require more resources, including travel, venue, and logistics.

Virtual sessions, on the other hand, offer greater flexibility, lower costs, and the opportunity to include geographically dispersed participants. They are well-suited for organizations with limited budgets or distributed teams. That said, virtual facilitation comes with its own challenges, including potential technology issues, reduced interpersonal connection, and the need to break up sessions across multiple days to avoid screen fatigue. Regardless of the format chosen, Event Garde intentionally designs the experience to foster engagement, ensure equity in participation, and maintain momentum throughout the planning process.

To determine the best option between in-person and virtual strategic planning, consider these questions:

- What is the size and geographic distribution of your team?
- What is your budget for travel and venue?
- Are participants comfortable and proficient with virtual technology?
- What outcomes are you prioritizing (e.g., creativity, efficiency, relationship-building)?
- How much time can participants commit to the process, and in what format?

In-person Set-up & Supplies

For in-person sessions, Event Garde works with the sponsoring organization to ensure the necessary supplies and space layout are set up. The following table shows a list of supplies for which Event Garde and the host organization are typically responsible (subject to change):

Event Garde	Sponsoring Organization
- Baskets (for participant supplies) - Card Stock (folded into tent cards) - Markers (Black Sharpies) - Markers (Colored Sharpies/Mr. Sketch) - Manual - Name Cards (2 sets) - Paper (white, cut in half) - Paper Towel Holder - Pens (purple) - Placemats - Post-it Notes (3x3; 12 sets) - Prepared Flipcharts - Round Stickers (purple) - Scissors (1 pair) - Scripts - Speaker/Charger - Spray Adhesive - Sticky/Magic Walls (3 large) - Strategic Direction Arrows (1 set) - Tag Cards (3 sets) - Tangles (fidget toys) - Tape (Blue Painters, Wide) - Visual Instructions - White Fabric Tape	- Food & Beverage, including: - Meals/breaks - Chocolate candy - Mints (e.g., Lifesavers) - Flipchart Paper (Post-It style; 2 fresh pads) - Virtual orientation meeting packets — printed out, stapled - Note pads or journals (one per person) - Pens (one per person)

For in-person strategic planning facilitation, the sponsoring organization is responsible for setting up the room to support a highly visual and interactive process. The ideal setup includes an open U-shape facing a blank wall where three 5-foot-tall by 12-foot-wide sticky walls can be temporarily attached using removable painter's tape. Ample, uninterrupted wall space is essential—smooth surfaces are preferred, without textured finishes or permanent fixtures like frames.

If space allows, round tables placed at the back or side of the room are helpful for breaks and meals. Depending on the room size, participant count, and any hearing accessibility needs, microphones may be required—a lavalier for the facilitator and a handheld mic for participants. No projectors or other A/V equipment are needed. To ensure a smooth start, access to the room is required at least two hours in advance (ideally the evening before) for setup, which typically takes two hours, with teardown requiring about an hour.

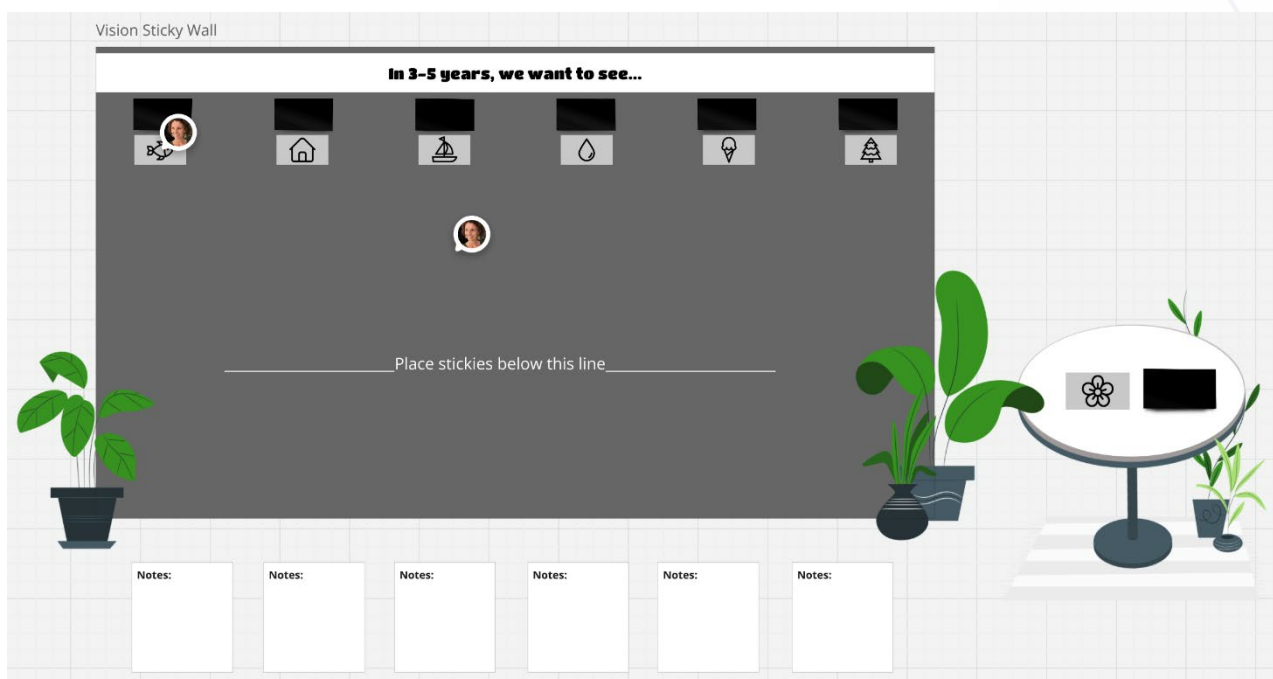**Sample Room Diagram**
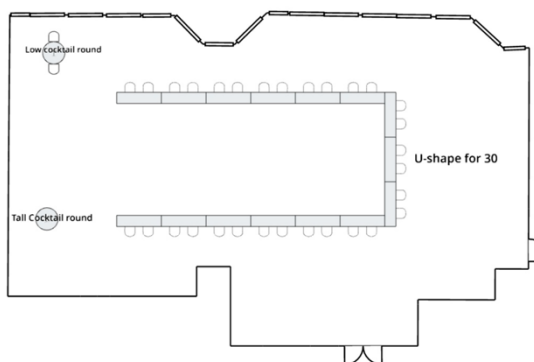
Sample Room Set

Sticky Walls

The sticky wall is a hallmark tool of the ToP Strategic Planning process, designed to foster collaboration and engagement. Sticky walls are large, portable fabric panels coated with adhesive spray, used in ToP facilitation to collect and organize group input in real time. They provide a highly visible, interactive workspace to visually organize and group ideas in real time, creating a dynamic, transparent process where everyone's contributions are seen and valued.

2 of 3, 5' Tall x 12' Wide Sticky Walls

Virtual Set-up & Supplies

For virtual engagements, Event Garde collaborates with the host organization to select an appropriate virtual platform, typically Miro or Google Slides, based on accessibility and participant needs. Recognizing that participants may have varying levels of familiarity with these tools, Event Garde provides a brief orientation to the chosen virtual software to ensure everyone is comfortable navigating the platform.

During the session, participants will receive a link to the virtual workspace, which they'll use to follow along, contribute, and collaborate in real time. These sessions are designed to be highly interactive, and participants are encouraged to enable their video and actively engage with facilitators and peers. Engagement may include using Zoom reactions, contributing to the chat, and unmuting to share insights or respond to questions. For the best experience, participants should join from a computer rather than a tablet or mobile device. Since screen sharing is not used, participants will toggle between Zoom and the virtual workspace throughout the session.

Partnerships in Practice

Testimonials

Our clients have enjoyed countless successful outcomes by partnering with the experienced team at Event Garde. Whether it's through strategic planning or other customized facilitation services we offer, we've had the opportunity to support organizations as they navigate complex challenges, build stronger teams, and move their missions forward.

Read about their experiences and get a clearer understanding of what you can expect from working with us.

Case Studies

At Event Garde, our goal is to help organizations intentionally and meaningfully transform the way they think, plan, and work. Through a thoughtful and inclusive approach to strategic planning, we guide teams in aligning their goals, clarifying their purpose, and building practical roadmaps for sustainable impact.

We've worked with a wide range of clients, each with their own goals and opportunities. Every planning engagement tells a unique story—like our work with the National Organization of Research Development Professionals (NORDP). Read the full case study to learn more about Event Garde's benefit summary, solution, and final outcomes. Then, explore our full collection of case studies to see how our approach has supported organizations at every stage of their journey.

"TCDLA has gone through several strategic plans over the past twenty years. The work sessions with Event Garde, led by Aaron Wolowiec, were engaging, inclusive, and all left feeling accomplished. Sessions included staff, members, and board members. We had so many varying opinions and ideas which Aaron helped facilitate our very vocal group to work together and come up with initiatives that would continue to allow our organization to grow. The sessions gave our group a clear direction to set tasks to accomplish each initiative with realistic timelines. As we continued to work through our initiatives, Aaron helped us streamline actions, details, and metrics, leading us to success!"

Melissa Schank
Texas Criminal Defense Lawyers Association

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National Organization of Research Development Professionals

NORDP charts bold, inclusive path forward with strategic roadmap facilitated by Event Garde.

Challenge: Following the expiration of its first-ever strategic plan, NORDP was at a critical juncture. As a rapidly growing member-based association representing research development professionals, the organization needed a refreshed strategy that would build on prior progress while addressing persistent organizational challenges. Key areas of concern included decentralized governance, over-reliance on volunteers, inconsistent communication, and a lack of unified direction. NORDP sought a collaborative planning partner that could foster inclusive participation and translate collective vision into a clear, measurable, and sustainable strategic roadmap.

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Conclusion

Strategic planning is no longer a luxury for organizations seeking growth — it's a necessity for those striving to stay relevant, resilient, and responsive in an ever-evolving world. In a time marked by uncertainty, innovation, and accelerated change, having a shared vision, a strategic framework, and a concrete roadmap is essential to move forward with clarity and purpose. Yet, developing a strategic plan isn't just about setting goals; it's about co-creating a direction that inspires action, fosters accountability, and builds momentum across all levels of an organization.

Using the ToP methodology, Event Garde delivers a strategic planning experience that is participatory, inclusive, and results-driven. Our process doesn't just produce a strategic plan—it builds shared ownership, elevates diverse perspectives, and empowers teams to lead with confidence. From visioning and barrier identification to defining bold strategies and actionable implementation steps, we ensure that each phase of the journey is meaningful, collaborative, and aligned with your organization's unique culture and needs.

More than just sticky walls or virtual whiteboards, our approach equips teams to bridge the often-overlooked gap between ideas and implementation. We bring **structure without rigidity**, **depth without delay**, and **creativity without chaos**. Whether in-person, virtual, or hybrid, our facilitation methods are designed to surface insight, spark innovation, and position your team for sustainable success.

As industries continue to shift, the value of intentional, inclusive planning will only increase. Organizations that take the time now to align their teams, assess their environment, and invest in collaborative strategy development will be best prepared to lead with purpose and adapt with agility.

Ready to explore how this approach can benefit your organization?

Let's start the conversation! Contact Event Garde to schedule a consultation and learn how our customized, hands-on approach to strategic planning can help you build a clear, actionable roadmap for the future. Let's chart your path forward—together.

About Event Garde

Consultancy

Event Garde is a consulting firm that deploys creative, adaptable, and successful approaches to support your learning, meeting, and facilitation needs. Our goal is to act as your partner, asking your team the right questions to develop thoughtful strategy, implement sound operations, and achieve stakeholder value.

Since 2011, we have had a role in the success of more than 125 clients as a direct result of the diverse and reputable thought leaders we employ, our commitment to growing the knowledge and confidence of the people in your organization, and the collaborative partnership we create from problem statement through solution design, development, and implementation.

Facilitators

Our clients think of us as a strategic partner who doesn't just work for them, but works with them, as an extension of their team. Moreover, we are knowledgeable and experienced when it comes to the details that go into planning a successful in-person, digital, or hybrid meeting, event, or facilitation. To learn more about our full team, their credentials, and their experience, please visit the Team tab on our website at eventgarde.com.

Aaron Wolowiec
FASAE, CAE, CMP Fellow
Founder & President
Certified ToP Facilitator & Mentor Trainer
Pronouns: he/him/his

With more than two decades of association experience, Aaron is a nationally recognized meeting professional, designer of engaging learning and networking experiences, and a certified facilitator who prioritizes participatory and equitable approaches to both consensus building and strategic planning. To get a deeper understanding of his experience, please access his curriculum vitae and volunteer/leadership experience.

Dilhara Muthukuda
Director, Facilitation Services
Pronouns: she/her/hers

Dilhara is an experienced facilitator with a background in strategic planning and diversity, equity, and inclusion. She is skilled in designing and leading engaging workshops that promote dialogue, critical thinking, and action. She is passionate about creating inclusive environments that enable individuals and organizations to reach their full potential. She has over a decade of experience in public health, advocacy, and health equity and racial justice work.

Krista Rowe
Senior Consultant
Pronouns: she/her/hers

Krista is a strategic facilitator and systems thinker with certification in and applied use of ToP methods. She partners with organizations to lead inclusive planning and group process work that fosters clarity, connection, and alignment. With a strong equity lens and over a decade of experience across sectors, she helps groups anchor their decision-making in shared values and lived realities. In addition to her work with Event Garde, she offers DEIB-focused consulting through her independent practice.

Expertise

A common misconception is that an effective strategic planning facilitator must be a subject matter expert in your organization's specific industry. In reality, successful facilitation depends not on deep technical knowledge, but on deep expertise in process—and that's precisely what Event Garde brings to the table.

Rather than providing pre-packaged answers, our role is to guide your team through a structured, participatory journey using the ToP methodology. We focus on asking the right questions, creating space for authentic dialogue, and building consensus around your lived experiences and aspirations.

You and your colleagues are the true experts when it comes to your work, your stakeholders, and your mission. Our job is to surface that expertise, connect the dots, and facilitate collective decision-making that moves your organization forward. Together, we co-create a strategic plan that is informed by your knowledge and owned by your community—ensuring relevance, clarity, and lasting impact.

Each activity is intentionally designed to build upon the last, helping us work together toward a clear, actionable, and inspiring future. We invite you to bring your subject matter expertise to the table—to share openly and engage fully.

Throughout this journey, we encourage you to lean into collaboration, trust the structure, and avoid overthinking individual steps. Wordsmithing every phrase is not the goal; building collective momentum is. In strategic planning, the focus is not on achieving perfection, but on reaching consensus—a common understanding that enables the group to move forward together.

Consensus does not mean unanimous agreement on every word or action, nor does it involve voting where some "win" and others "lose." It is not about settling for the lowest common denominator or producing watered-down solutions. Instead, consensus reflects a willingness among all participants to support the overall direction, even if not every detail aligns perfectly with individual preferences. It is about shared clarity, collective purpose, and a unified commitment to action.

By embracing the process and aiming for alignment over perfection, we'll create a strategic plan that reflects your organization's values, vision, and the voices of the people who know it best: **you**.

Appendix

Frequently Asked Questions (FAQs)

Before diving into a strategic planning engagement, many organizations have important questions about the process, timeline, roles, and outcomes. Below are answers to some of the most frequently asked questions to help you better understand what to expect and how to prepare for a successful partnership with a strategic planning facilitator.

1. How do I know if my organization is ready for strategic planning?
Strategic planning requires clarity, commitment, and capacity. For a deeper dive into signs of readiness and how to prepare, check out our blog post: Maximizing Readiness: Key Factors for Successful Consulting Partnerships.

2. What makes the ToP Strategic Planning method different from other approaches?
The Technology of Participation (ToP) method is a highly participatory, structured approach that emphasizes collaboration, equity, and practical action, engaging diverse stakeholders in a process that builds alignment and shared ownership. Read about what makes ToP unique on page 7.

3. Can this process be customized to fit our organization's culture or timeline?
Absolutely. Each engagement is tailored to reflect your organization's values, priorities, capacity, and pace, ensuring the process is meaningful and manageable for your team.

4. What role should our board and staff play throughout the process?
Both staff and board members play essential roles, bringing different but complementary perspectives. Board members typically focus on strategic direction and long-term impact, while staff contribute valuable operational insight and are often key to successful implementation. Engaging both groups in the process ensures a well-rounded, actionable plan with strong buy-in across the organization. Suggestions of who should participate in each phase of the process is outlined in the orientation message shared during the Preparation and Design phase.

5. My organization values diversity, equity, inclusion, and belonging (DEIB). How do you incorporate this into strategic planning?
Our process is grounded in inclusive participation and designed to elevate all voices. We intentionally embed equity-centered practices throughout every phase of planning, from stakeholder engagement to implementation.

6. How do you ensure broad stakeholder engagement without overwhelming the process?
We begin with stakeholder mapping early in the preparation and design phase to thoughtfully identify who should be involved, how, and at what point in the process. Then we design participation that is focused, purposeful, and accessible, using clear roles and touchpoints that don't overburden your team.

7. What are the deliverables we can expect from this process?
Deliverables typically include a summary of key environmental assessment data, a detailed strategic plan, visual documentation of session outputs, and a focused implementation framework, complete with goals, timelines, assignments, and 90-day action steps.

8. Do you help with implementation after the strategic plan is complete?
Yes. We offer a focused implementation phase and optional coaching extensions to support your team as they translate strategy into action and sustain momentum.

9. How do we keep the momentum going after the planning sessions are over?
We provide a structured implementation process and offer a 90-day check-in to review progress, identify roadblocks, and recalibrate as needed, ensuring your team stays aligned and energized.

10. What happens if we get stuck or there's disagreement during the planning sessions?
Our facilitators are trained to navigate tension and guide groups through collaborative decision-making. We use structured techniques that help move past roadblocks and ensure all voices are heard.

11. What are the pros and cons of doing this virtually vs. in-person?
In-person sessions foster deeper connection and energy, while virtual sessions offer flexibility and lower travel/participation costs. Learn more in the "Considerations" section on page 16.

12. How much time does the strategic planning take?
Our standard process spans six to nine months from onboarding through implementation. However, the timeline can be adjusted to fit your organization's capacity and goals.

13. What is the typical investment for a strategic planning process?
For a group of 20–30 participants, investment typically ranges from $15,000 to $20,000 plus travel expenses and supplies. Customizations based on group size, timeline, and facilitation needs may increase or reduce the total cost.

14. Who will project manage the strategic planning process?
Event Garde provides full project management support in collaboration with a designated point of contact from your organization. We'll help coordinate schedules, track deliverables, and keep the process on track from start to finish.

15. Can we engage you again in the future for plan updates or refreshes?
Yes! We love building long-term partnerships and frequently support clients with plan refreshes, stakeholder re-engagement, or focused strategy updates down the road.

Resources

Whether you're new to facilitation or looking to deepen your strategic planning practice, the following resources offer valuable tools, communities, and learning opportunities. These trusted partners and platforms can support your continued growth and help bring the ToP methodology to life in your own work.

[Institute of Cultural Affairs](#) — The ICA-USA website provides an overview of the organization's history, mission, and global impact, along with resources on community development and facilitation.

[ToP Network](#) — The ToP Network is a community of ToP facilitators and practitioners, offering professional development, resources, and a platform to connect and share best practices.

[ToP Training](#) — This site offers access to the full catalog of ToP courses, training schedules, and registration information for individuals seeking to develop their facilitation skills.

[Event Garde](#) — Event Garde is a consulting firm specializing in meetings, learning, and facilitation, providing custom solutions, resources, and training that support engagement, equity, and impact.

[FACILIT8me](#) — FACILIT8me is Event Garde's brand focused on facilitation, offering tools, templates, training, and community for both new and experienced facilitators.

Sample Documents

The following sample documents are available upon request for prospective clients who are currently seeking strategic planning services and have completed a scoping call with a member of the Event Garde team. To get started, take a few minutes to fill out this form and then an Event Garde team member will contact you to schedule a date and time for a conversation.

Division of Roles & Responsibilities — This document outlines the key responsibilities shared between Event Garde and the client organization throughout the strategic planning process. It clarifies expectations and timelines, identifies lead contacts, and supports smooth collaboration and communication from start to finish.

Getting Started Email — This email is the official launch of the planning process, welcoming the client team and outlining immediate next steps, including material requests, scheduling, and key logistics to prepare for the virtual kickoff session and beyond.

Virtual Kickoff Session Agenda — This agenda provides an overview of the initial virtual session with key staff and leaders. It helps establish shared purpose, review organizational background materials, and co-create the strategic planning focus question that will guide the process.

Sample Environmental Scan — This document showcases how we collect and summarize key internal and external insights—including stakeholder feedback, trends, and organizational data—to inform strategic planning discussions and ground the work in current realities.

Virtual Orientation Agenda — This agenda outlines the structure for a virtual orientation with all planning participants. It introduces the process, sets expectations, reviews key organizational materials, and builds shared understanding ahead of the primary strategic planning session.

Sample Strategic Plan — This sample illustrates the final deliverable from a full ToP planning process, including key milestones, guiding statements, and outputs from each workshop: Practical Vision, Underlying Contradictions, and Strategic Directions. It also features a focused implementation roadmap, offering a clear example of how strategy is translated into action.

Focused Implementation Template — This template is used during the final phase of the process to help teams operationalize their strategy. It includes space to define annual accomplishments, map timelines, assign responsibilities, and draft 90-day action plans that support implementation and accountability.
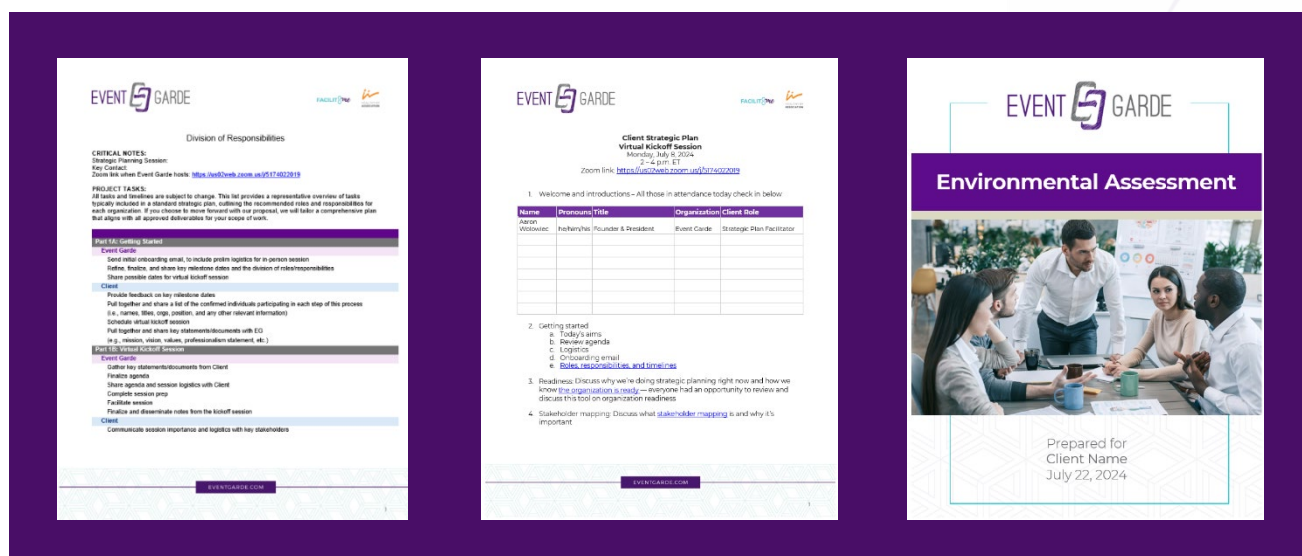
Strategic planning isn't just about setting goals—
it's about co-creating a clear, actionable future through
collaboration, consensus, and shared ownership.

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