

SCORE

Strategic Planning for Nonprofits

Presented by Alex Shapiro

Overview

Overview

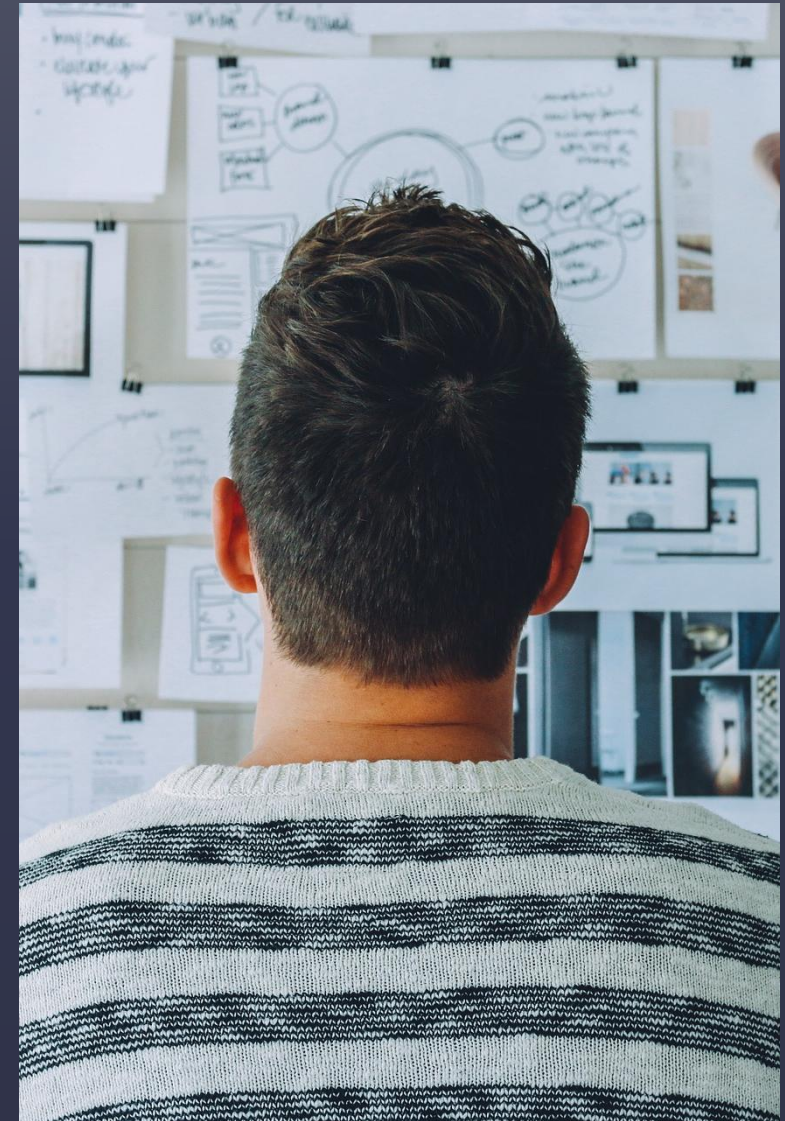
This Presentation

- Provide an introduction to preparing for and conducting a strategic planning process
- Will not be comprehensive
- There are no hard-and-fast rules; each process will depend on desired goals and outcomes
- One size does not fit all and not every strategic planning process needs to have similar goals
- Will focus on a “classic” approach to strategic planning, which will suit most small organizations

Overview (cont.)

Types of Plans

- Annual plan
- Contingency plan
- Strategic plan



Who Has Done Strategic Planning?

A Poll

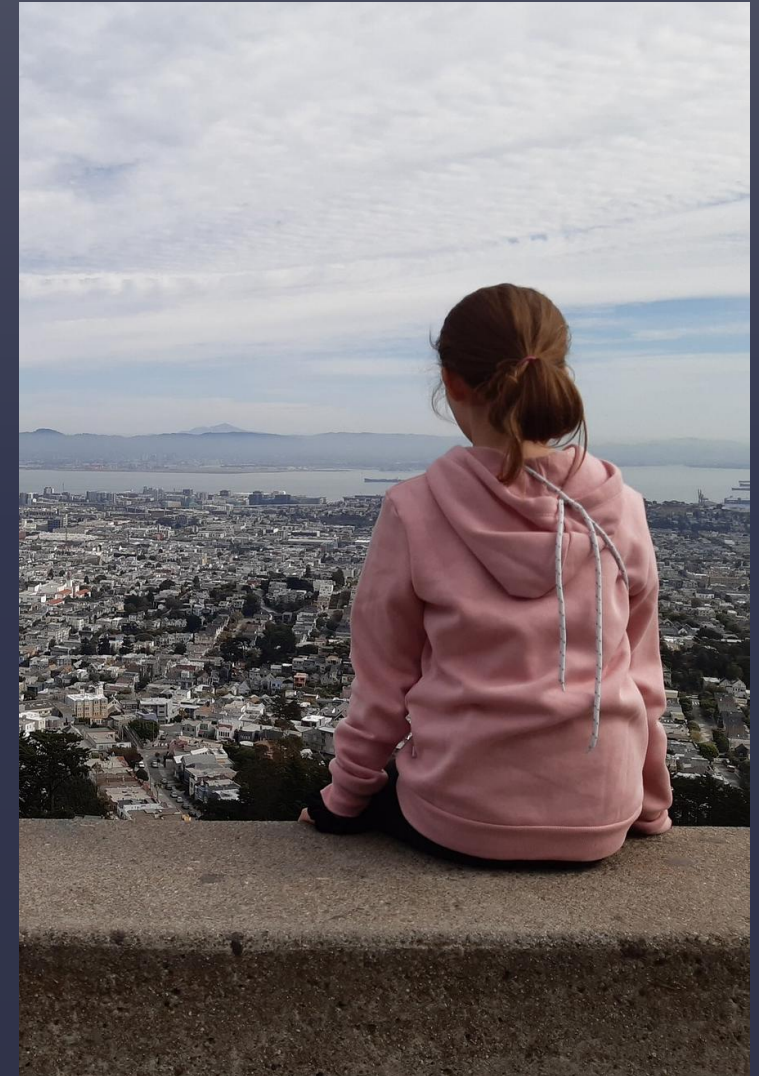
Why Do Strategic Planning?

A Poll

Overview (cont.)

Why do Strategic Planning

- Provides an opportunity to step back from daily operations to look at the big picture
- Helps to align various constituents
- Helps to establish broad priorities



Overview (cont.)

What is Strategic Planning

Some of the things strategic planning does:

- Identify goals/priorities that will best enable a nonprofit to achieve its mission
- Align various constituents around an organization's mission, vision, and values
- Identify an organization's strengths and weaknesses
- Create a broad action plan to accomplish identified goals/priorities

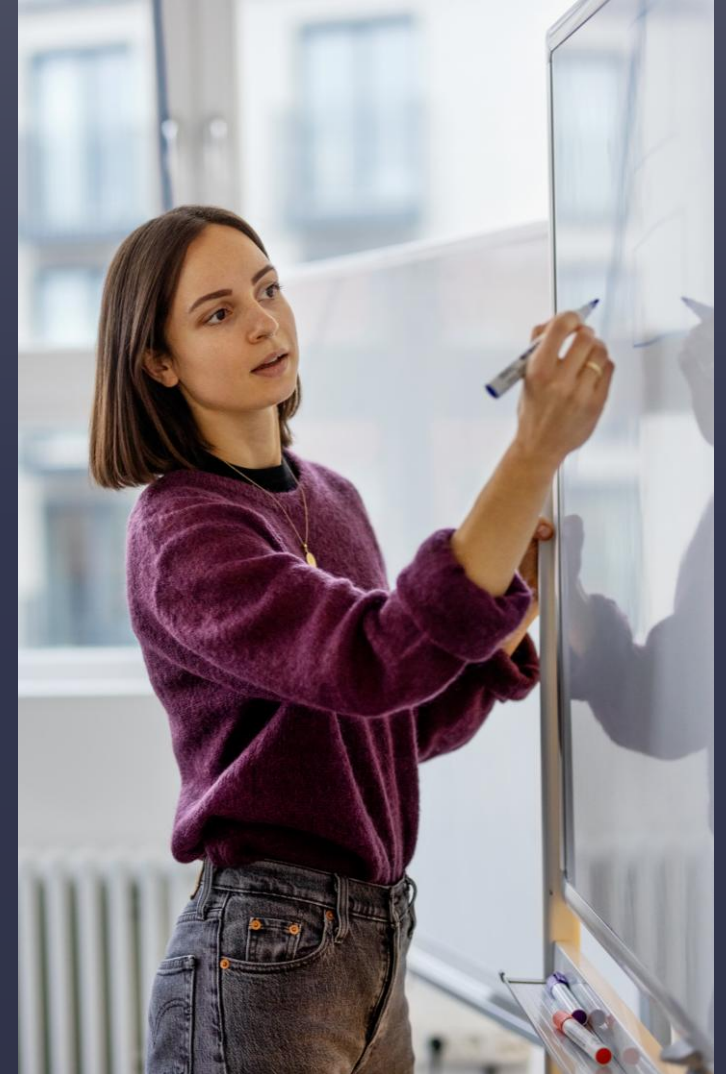
Some of the things strategic planning is NOT:

- Does not predict the future
- Does not replace the day-to-day needs of good leadership
- Not "one and done"
- Not quick

Overview (cont.)

Some Goals and Objectives

- **Identify organizational strengths, weaknesses, opportunities, threats (SWOT)**
- **Establish organizational priorities for the short-term, mid-term, and long-term**
- **Identify measurable goals/objectives for the priorities**



Preparation

Preparation

Strategic Planning Committee

- **Top staff and top Board members should lead the process**
- **Recruit and convene committee**
 - ❖ **Board members**
 - ❖ **Staff members**
 - ❖ **Other key stakeholders**



Preparation (cont.)

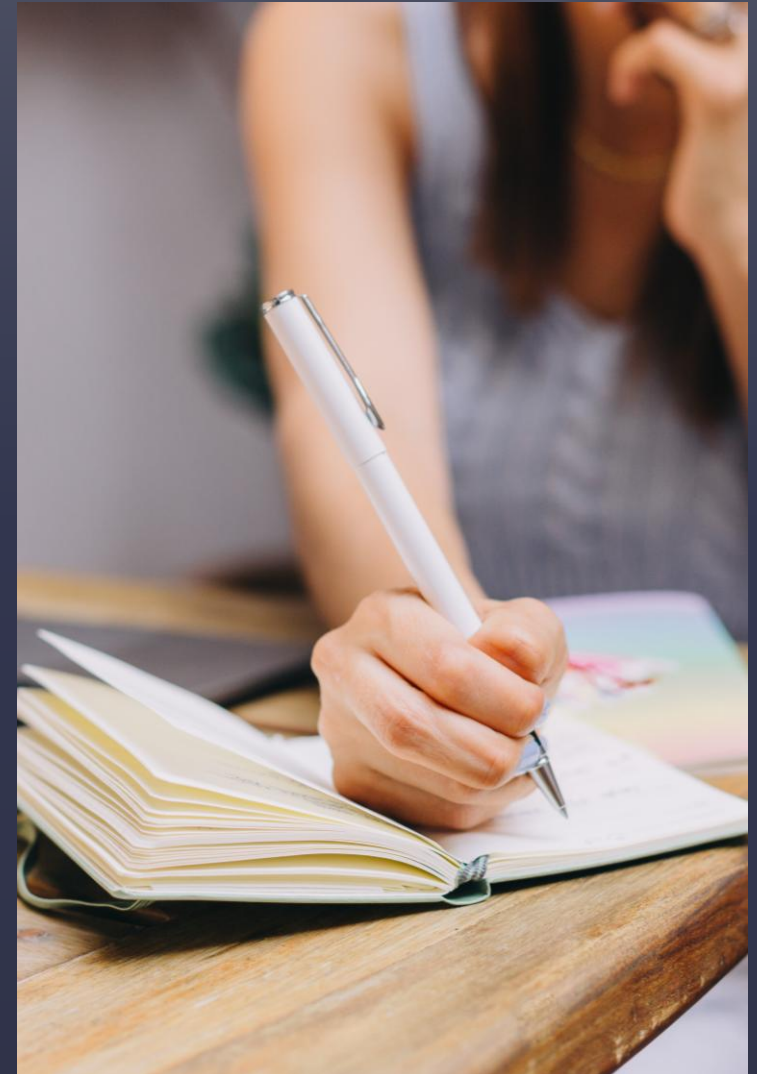
Initial Steps

- Determine scope of strategic plan including desired outcomes
- Establish a budget and schedule
- Hire consultant, or find a facilitator, if appropriate
 - ❖ Provides expertise in strategic planning organization and process
 - ❖ Can ask the difficult questions or invite difficult conversations with objectivity
 - ❖ Can objectively keep the process on track, as well as facilitate session(s) and facilitate the delivery of a final document
- With facilitator/consultant, determine strategic planning process structure needed to achieve desired outcomes
- Identify important issues that should be addressed in the process

Preparation (cont.)

Initial Steps *Documents Produced*

- **Committee contact information roster**
- **Planning schedule with agenda for first full meeting**
- **List of key questions/issues for various stakeholder groups**



Who Should Participate?

A Poll

Preparation (cont.)

Participants

- **Board members**
- **Staff leadership**
- **Staff members**
- **Clients**
- **Other possible stakeholders, such as donors, community leaders, etc.**



Preparation (cont.)

Preparation Activities

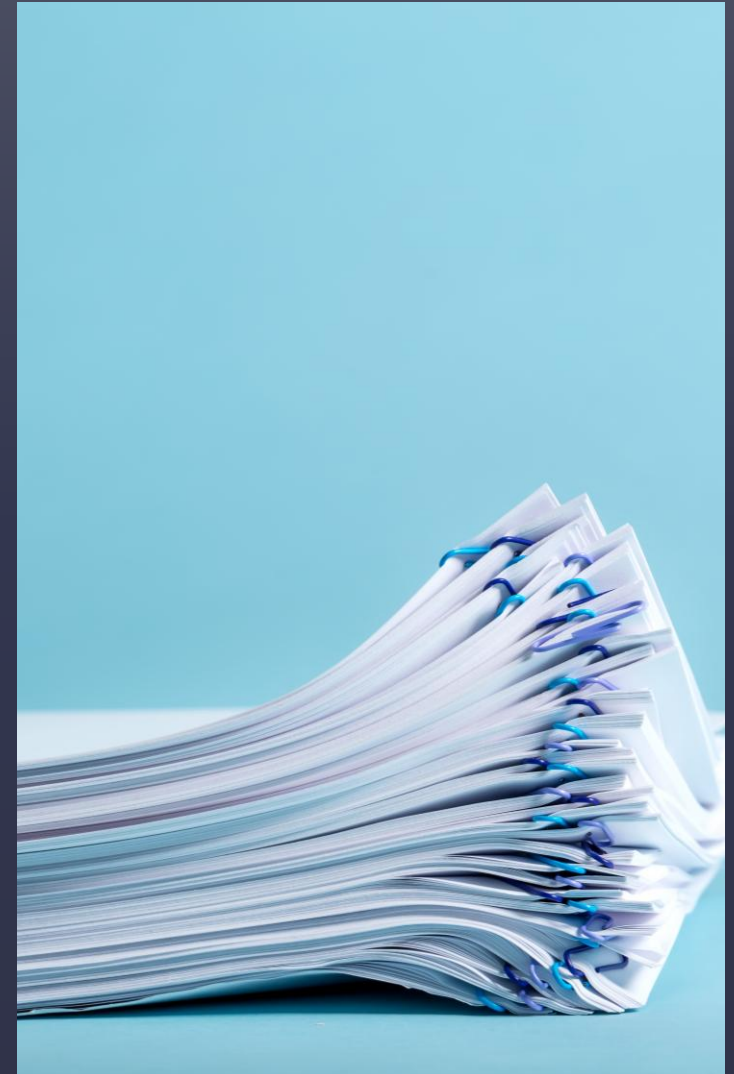
- **Organizational self-assessment**
- **Stakeholder meetings/input/feedback:**
 - ❖ **SWOT: Strengths, Weaknesses, Opportunities, Threats**
 - ❖ **Discuss organization's "competition"**
 - ❖ **Needs addressed by organization**



Preparation (cont.)

Preparation Activities *Documents Produced*

- **Summary of stakeholder input**
- **SWOT analysis**
- **Competition analysis**
- **Questions raised by stakeholders**
- **Organizational history/analysis**



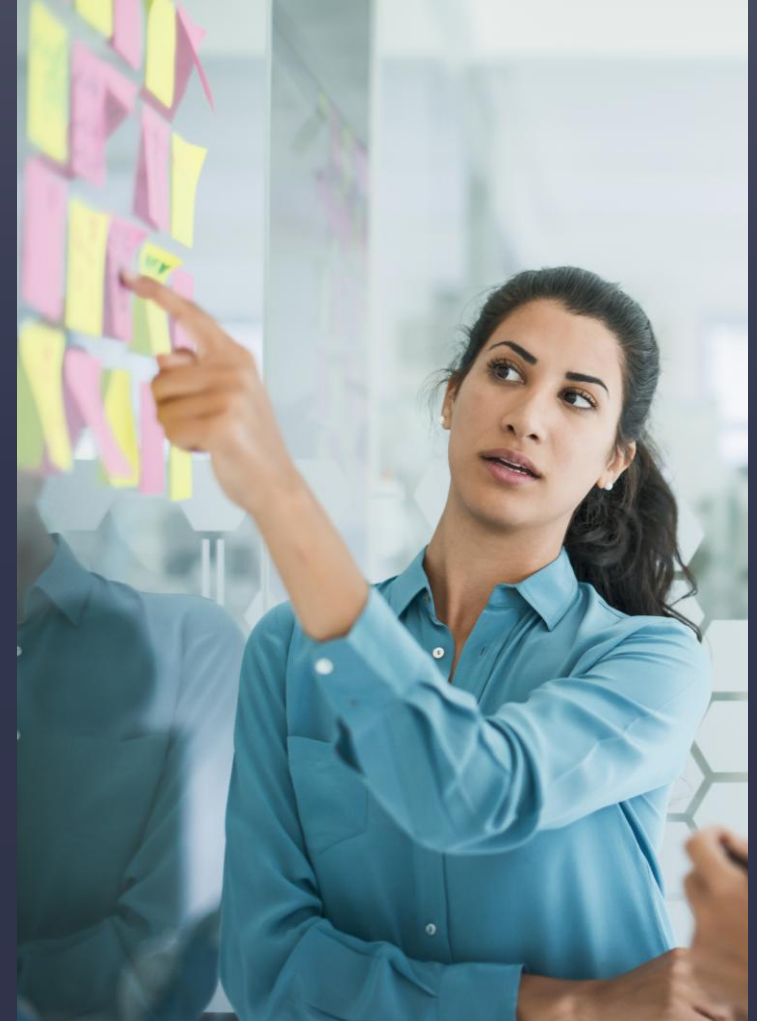
Questions?

Implementation

Implementation

Sessions *Mission/Vision/ Values*

- **Mission statement describes an organization's reason for existence**
- **Vision statement describes what ideal state or condition the organization wants to see and achieve**
- **Values statement is the list of principles that guide and direct the organization and its culture**



Implementation (cont.)

Sessions *Mission/Vision/ Values Example*

Kids Community Growing Prosperity

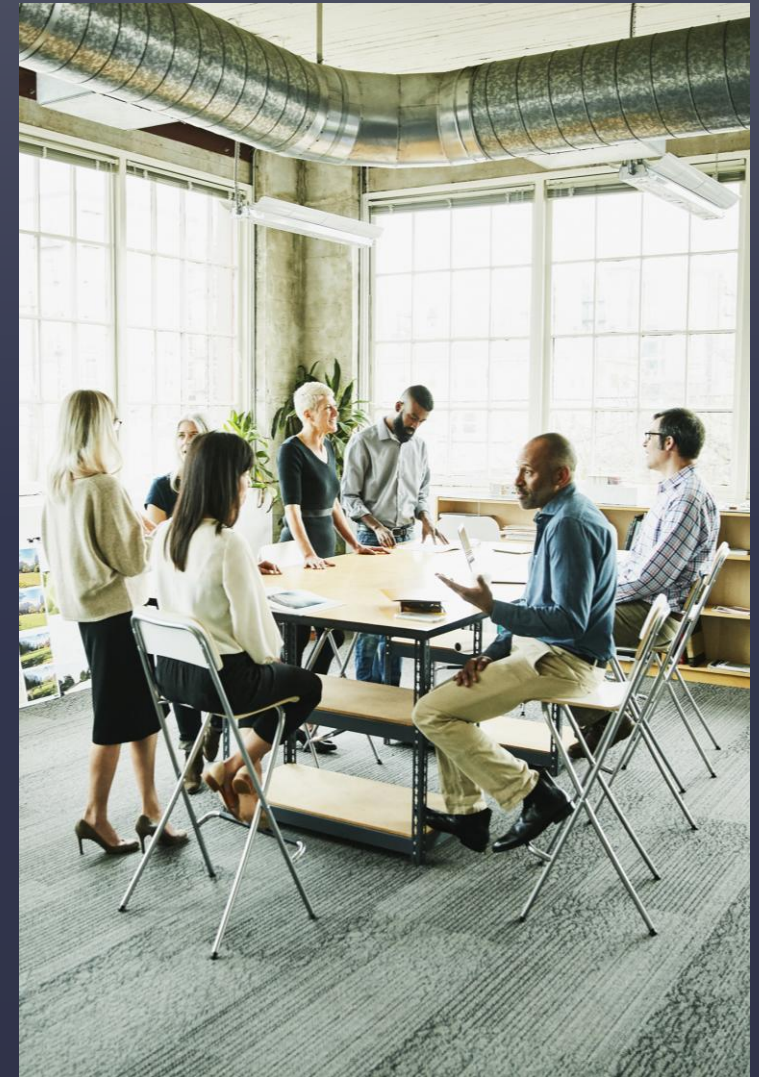
- **Mission:** to empower and motivate future leaders toward their goals and dreams, by providing the necessary resources and tools. KCGP collaborates with other local organizations in the community whose purpose is to provide mentorship and resources for Kansas City's urban youth to accomplish their goals and strive to make their dreams come true.
- **Vision:** KCGP envisions a community that has the knowledge to reach its full potential.
- **Values:**
 - ❖ Knowledge – We aim to provide information, understanding, or skills to help others make wiser life choices.
 - ❖ Candor - We believe that the quality of being open, sincere, and honest is a fundamental high standard of our organization and is critical to our success.
 - ❖ Growth – We will help establish a solid foundation through experience or education by perceiving, discovering, or learning.
 - ❖ Perseverance - We encourage others to pursue their goals and dreams or achieve something despite difficulties, failure or opposition.

Implementation (cont.)

Sessions *Envision*

Where do you want to be in five years?

- **New programs/services?**
- **Old programs/services?**
- **Scope of programs?**
- **Geographic reach?**
- **Other?**



Implementation (cont.)

Sessions *Gaps*

What are the gaps between the present and the future (as envisioned)?

- **Leadership and staffing?**
- **Funding?**
- **Facilities?**
- **Other?**



Implementation (cont.)

Sessions *Trends*

What uncertain trends, scenarios, developments might be possible? How will your organization respond?

- **Pandemic?**
- **Economic downturn?**
- **New competition?**
- **Sudden new opportunities?**



Implementation (cont.)

Sessions *Priorities*

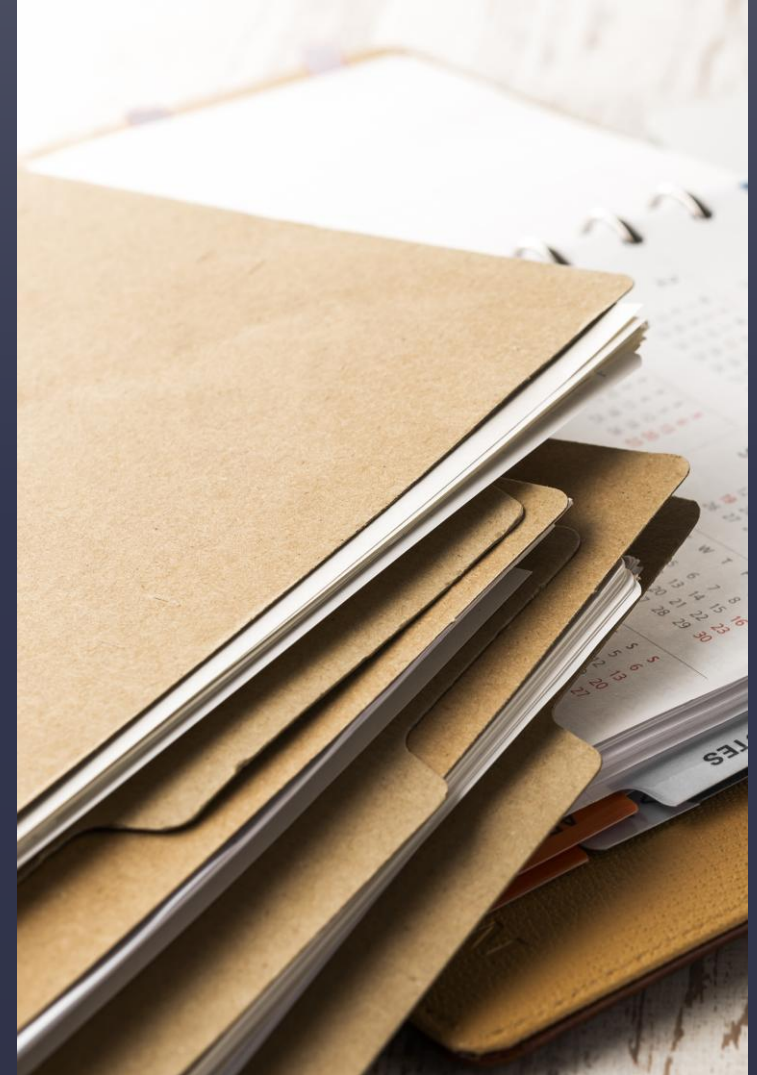
Review and determine top priorities.

- Winnow output from the previous sessions and build consensus around organizational priorities (no more than 5?)
- Create intermediate measurable goals and objectives for each priority
- Estimate timeframe for achieving each goal

Implementation (cont.)

Sessions *Documents Produced*

- Reports for each session, capturing details and summarizing
- Overview of priorities, including desired outcomes, intermediate goals, and timeframe



Implementation (cont.)

Final Report *(to be shared)*

- Introduction and executive summary
- Background and appropriate historical information
- Overview of issues/questions discussed by participants, as well as methodology
- Overview of session(s)
- Each priority with the reason and ultimate desired outcome, as well as intermediate goals
- Timeframe for achieving goals
- Description of process for tracking progress



Questions?

Next Steps

What Are They?

Next Steps

Most Important Part!

Turn priorities into operations

- Have a reporting process that tracks progress in achieving priorities and intermediate goals
- Staff should develop work plans that specifically address attainment of goals and priorities
- Staff leadership should report progress to the Board on a regular basis



Next Steps (cont.)

Most
Important
Part!

- **At appropriate intervals, Board meetings should include an agenda item for reviewing priority progress**
- **Schedule periodic evaluation sessions whose sole purpose is to assess the progress in the strategic plan. Monthly is WAY too often and every other year is WAY too infrequent.**

Don't . . .

Pitfalls to Avoid

- Don't start a strategic planning process when/if the organization is in crisis. Resolve that immediate situation first.
- Don't assume all strategic planning processes are the same. Each one must be designed to suit the needs of an organization at that time.
- Leave ego at the door.
- Strategic planning is not one and done. The process provides a roadmap, so use it to operate your organization.
- Don't let too much time pass between evaluations and don't wait until the end of one strategic plan to start thinking about another one.

Resources

Nonprofit Association of Washington

<https://nonprofitwa.org/learn/learning-library/fundamentals/>

Strategic Planning for Nonprofit Organizations (3rd Edition)

Michael Allison/Jude Kaye

The NonProfit Strategy Revolution: Real-Time Strategic Planning in a Rapid-Response World (2nd Edition)

David La Piana

w/Melissa Mendes Campos

Questions?