



Strategic Planning for Nonprofit Boards and Staff




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Desired Outcome for Today:


A knowledge of basic strategic planning and strategies for making your process successful, along with a belief that it is a doable and beneficial activity.



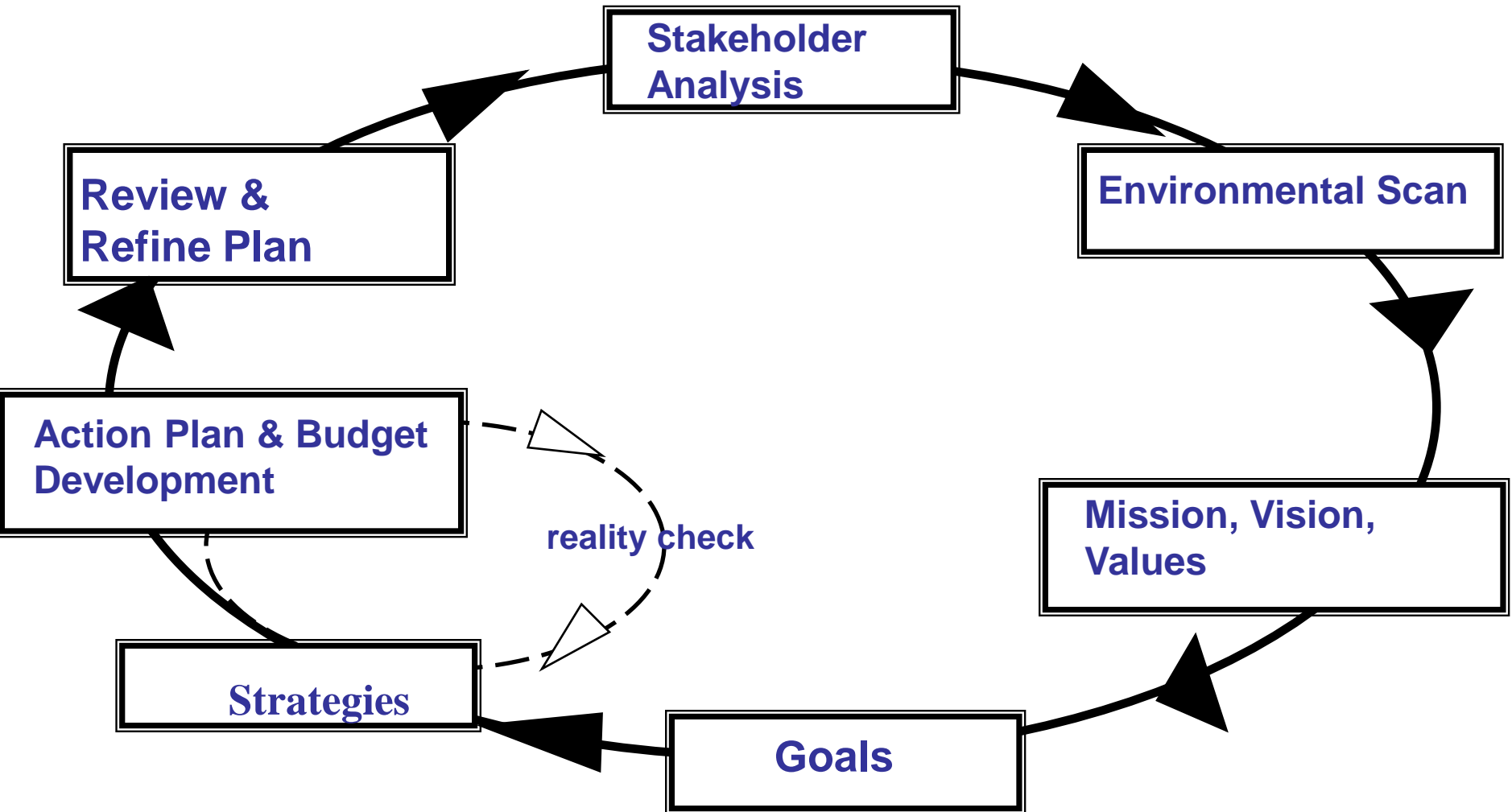


What is strategic planning?

A comprehensive effort to determine where an organization should be going over the next 3-5 years and how it will get there.



STRATEGIC PLANNING MODEL





Why do it? To:

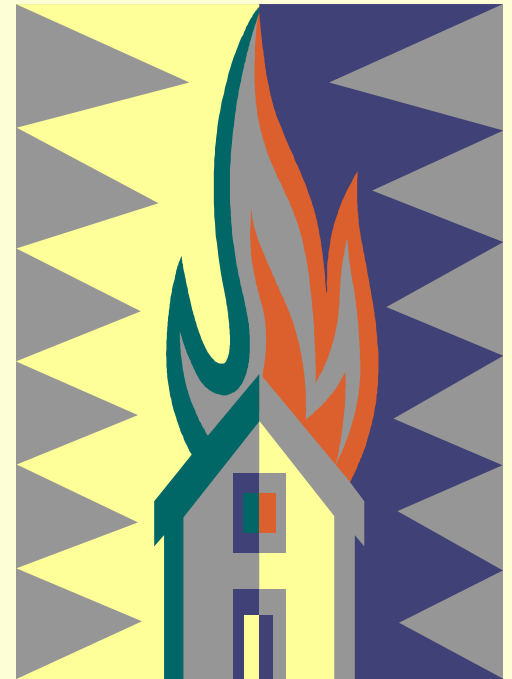
- Build organizational cohesion and teamwork
- Generally improve decision making
- Use scarce resources wisely
- Manage changes--growth, economic, policy, competition, etc.
- Prepare for the future

Value Added: Improved credibility with funders!




You are not ready to do a strategic plan if:

- You are in the midst of a financial or other crisis (“If the house is burning, you don’t talk about remodeling.”)
- There are significant—but unknown--external changes on the horizon that will affect you
- You do not have a complete board
- You have just hired a new executive director





You are ready to plan if:

- Doing so is supported by the board and lead staff
 - Both your external and internal environments are reasonably stable
 - There is a reasonably high level of trust between board members and board & staff
 - You have the resources (time and money) that planning will take
- 


Who should be involved?

- Board
- Staff
- Other stakeholders (volunteers, partnering agencies, community members)
- A steering committee made up of representatives of the above groups







The charge of the steering committee is to:

- Design the process, including the identification of stakeholders
 - Keep the process moving to completion
 - Interpret “data” that is gathered from larger stakeholder meetings
 - Serve as liaisons with others in the organization & community re: the strategic planning process
- 




The Board's Role in Strategic Planning:

- Provide input on mission, vision, values and primary goal areas
 - Serve as a link to the larger community during the planning process
 - Add value to the process by sharing expertise (financial, legal, marketing, etc.)
 - Approve or adopt the final plan
 - Allocate the resources necessary for plan implementation
 - Monitor progress toward goals identified in the plan
- 



Stakeholders: Who has a stake in our work and our future?

- Consumers & their families
 - Community members
 - Policy makers
 - Partners
 - Board
 - Staff
 - Volunteers
- 



Environmental Scan: What's going on that affects those we serve and how we serve them:


- SWOT analyses
 - Consumer & community surveys
 - Data from a variety of sources (# served, growth trends, etc.)
 - Focus groups
 - Current public policy
- 



A Mission Statement Answers These Questions:

- What is our purpose?
- What are we doing now?
- And, who are we doing it for?

A mission statement acts as a disciplinary device, keeping you focused and preventing you from expanding willy-nilly.





A Vision Statement Answers These Questions:

- What does the ideal future for those we serve look like?
- What change will have taken place in people's lives as a result of our work?
- What if there were no barriers, limitations?

"You've got to think about big things while you're doing small things, so that all the small things go in the right direction."

— Alvin Toffler





A Values Statement Answers These Questions:

- What is our driving force?
- What traits and qualities do we care about the most?
- What are the beliefs that guide our actions?

“When your values are clear to you, making decisions becomes easier.”

Roy Disney




Identify Goals

These should:

- Consist of outcomes that must happen in order for your mission & vision to be fulfilled
- Be matched to information revealed in your environmental scan
- Be accompanied by indicators or outcomes that identify how you measure success or progress






Identify a set of strategies/activities for achieving each goal:

- What specifically will you do to reach the goal?

Example:

Goal: Decrease the number of suicides in our community.

Strategy: Working with the School District, implement a bullying prevention program.





Create an action plan that accompanies each strategy:

- Specific steps to implement the strategy
- Timeline for completion
- Who is responsible
- Estimate of resources needed

The creation of new action plans should be done annually and at a time that precedes budget development.



ACTION PLANNING WORKSHEET


GOAL: Decrease the number of suicides in our community.


STRATEGY: Implement a Bullying Prevention Program in schools

ACTION STEP	RESPONSIBLE PARTY	TIME LINE	RESOURCES NEEDED
1. Research effective programs	Subcommittee (Center & SD staff)	By June 1, 2011	Staff & volunteer time
2. Select program; assess feasibility, possible funding sources	Subcommittee	By Aug. 1, 2011	Staff & volunteer time
3. Get approval of Center & SD administrators & boards	Subcommittee	By Sept. 15, 2011	Staff time
4. Write grant proposal to fund program; secure in-kind contributions	John (Center grant writer)	By Nov. 15, 2011	Staff time
5. Train teachers and others in anti-bullying strategies	Outside Trainer	By January 15, 2012	Costs as per above grant proposal and in-kind contributions



Reality Check:

- Are our goals and strategies in alignment with our resources—facilities, finances, people?
 - Do we have the “power” to implement identified strategies, or
 - Do we need to create new partnerships?
- 



A typical planning process might look like this:


What?	Why?	Who?
Planning Meeting	Design process, identify stakeholders, review info for environmental scan	Steering Committee Facilitator
Stakeholder Meeting #1	Share overview of process; conduct SWOT, gather data for mission, vision, values & priority goals	Steering Committee Facilitator
Steering Committee Meeting	Develop draft mission, vision, values & priority areas	Steering Committee w/ or w/o Facilitator
Stakeholder Meeting #2	Present draft mission, vision, values, priority goals. Take input for refinement. Gather preliminary data for strategies.	Steering Committee Stakeholders Facilitator



What?	Why?	Who?
Steering Committee & Board Meeting	Finalize mission, vision, values, priority goals and present to board for "blessing"	Steering Committee Board
Staff and/or Department Meetings	Develop draft/strategies for reaching goals	Staff
Steering Committee Meeting	Review draft strategies/activities to ensure alignment with scan & stakeholder perspectives	Staff Steering Committee
Board Meeting	"Bless" strategies	Board
Staff and/or Department Meetings	Develop action plan (one year) for each strategy/activity	Staff
Board	Formally approve strategic plan	Board
Share plan with stakeholders	Promote buy-in & pave way for implementation	Board, Staff, Steering Committee





SUCCESS!

- Get the right people to participate
 - Allow enough time to prepare for the process and for planning itself
 - Be constantly aware of actions and reactions that could undermine the process
 - Check in with the larger group of stakeholders at critical times
 - Be nimble; if something's not working don't be afraid to change it
 - Manage conflict in a way that accommodates a variety of voices
 - Consider the use of a neutral facilitator
- 



Ensure effective implementation of the plan by “institutionalizing” it:

- Provide regular updates on progress toward goals
 - Tie budget line items to strategic plan goals
 - Include key elements of the plan in your annual report and other public documents
 - Require that any grant application be tied to the strategic plan
 - Post key elements of the plan in staff & board meeting rooms
 - Translate the plan’s actions into job descriptions & performance reviews
 - Make review and refinement of the plan an annual event
- 



**“Unless commitment is
made, there are
only promises and hopes;
but no plans.”**

--Peter Drucker



Questions?
Comments?
Ideas to share?





THANK YOU!

For electronic copies of this presentation
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