Strategic Planning I

Creating Plans that Stay Off the Shelf
Introductions

In terms of strategic planning, my organization...

1. Has a current plan that informs our daily work plans and has a process for reporting and updating

2. Has a plan but I’m not sure exactly where it is or how it’s used

3. Thought about planning but real life got in the way
Why Plan?

- Prepare for success
- Get everyone on the same page
- Set direction for board and staff
- Show level of sophistication
- Required by funders
What’s in the plans

- Strategic Plan
- Development Plan
- Business Plan
- Marketing Plan
- Technology Plan
- Volunteer Plan
Focus on the strategic plan

- Mission
- Strategic Vision
- Goals
- Strategies
- Objectives
- Budget
- Action Items and Timeline
- Process for making changes to the plan
Other options

- Work completed during the process  
  (e.g. SWOT, stakeholder analysis)
- Values statement
- Positioning statement
- Measurements summary
- Process for communicating the plan
Mission

- Reason for existence
- Purpose
- What we do and for whom

Focus: What is important about the organization?
How can it be conveyed quickly, clearly, and with inspiration?
Vision

- What we hope to do, based on our mission
- Our preferred future

Focus: Don’t assume same resources as today

Vision killers: tradition, fear of ridicule, stereotypes, complacency, nay-sayers
Goals

- Descriptive
- Convey a purpose
- Identify activities to achieve mission and vision
- Not quantitative

Focus: How to move from mission to vision
Strategies

- Activities to reach goals
- Measurable
- High level

Focus: Interim activities needed?
Action Plan

- Specific steps
- Who, what, when

Focus: Roles you are willing to fill
Budget

- What resources, generally, are needed?

Focus: Best estimate of staffing and overhead
SAMPLE

**Mission:** We meet the needs of those experiencing homelessness in our community by providing emergency shelter and transitional services

**Vision:** Our work will help ensure that all in our community are able to meet their basic human needs

**Goal 1:** Sufficient emergency shelter

**Strategy:** Build two additional units to house families

**Action Plan:** Apply for Community Development Grant  
Development Officer supervises grant application in first quarter, 2011, Board President meets with County Commission

**Budget:**  
$25,000 per unit  
$1,000 grant-writing support
Content Q&A
Ready to Plan
Four Phases

- Pre-planning work
- Making decisions
- Writing the plan
- Plan approval
Pre-Plan Work

- Gathering information
  - external and internal assessments
  - market assessment
- Identifying critical issues
Making Plan Decisions

- The Board Retreat
  - Create the agenda
  - Reports on findings
  - Prepare with focus questions
  - Use a facilitator
Writing the Plan

- Consider staff capacity
- Use a model
Plan Approval
A Living Document
(or Keeping Your Plan Off the Dusty Shelf)

- Accountability
  - Assign a manager
  - Create work plans
  - Reports to the board
How to get started
The Planning Consultant

- Guiding the process
- Stakeholder input and research
- Planning the agenda
- Facilitating the retreat
- Documenting results
- Writing the plan
The Planning Consultant

- Create an RFP
- Get referrals from other organizations, funders and nonprofit associations
- Interview candidates – Fit to your organization
When you can’t meet the budget

- Plans are not a substitute for leadership
- Annual “cut plan”
- Triggers to implement
# Sample Cut Plan

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost</th>
<th>Trigger</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hire new case manager</td>
<td>$40,000</td>
<td>Funding not received by April</td>
<td>Unable to meet goal to provide more work skills training</td>
</tr>
<tr>
<td>Build two new housing units</td>
<td>$50,000</td>
<td>Funding not received by June 30</td>
<td>Unable to serve 25 families this year; partnership with ABC Organization jeopardized</td>
</tr>
<tr>
<td>Across the board staff raises</td>
<td>$10,500</td>
<td>Less than $150,000 in reserve fund at year-end</td>
<td>Potential loss of some employees</td>
</tr>
<tr>
<td>Retain current level of services in transitional program</td>
<td>$60,000</td>
<td>More than 10% behind revenue plan in any quarter</td>
<td>Staff lay-off in this program also affects ability to deliver parenting classes</td>
</tr>
</tbody>
</table>
Nonprofit Resources

- Strategic Planning for Nonprofit Organizations
  Michael Allison & Jude Kaye

  - www.ManagementHelp.org

  - www.NPGoodPractice.com

  - www.CreateTheFuture.com
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Q&A