Strategic Planning

Component Descriptions and Samples
Jan McGowan
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Vision

Mission

Goals

Strategies

Strategic Action Plan

Fund Needs

Sources

FR Activities

Funding Action Plan

Strategic Plan

Fund Development Plan
Component Descriptions
Vision Statement

• What we hope to do
• Our preferred future, looking out 10+ years

**Focus:** Imagine – what we could do - don’t assume same resources as today

**Vision-killers:** tradition, fear of ridicule, stereotypes, complacency, nay-sayers
Mission Statement

• The reason for our existence, justification for being
• Our purpose
Focus: What is important about our organization? How can it be conveyed quickly and clearly?
Goals

- Descriptive, describe how we will meet our mission
- Convey a purpose; are not quantitative

Focus: Dream – how to move from mission to vision

Goal-breakers: too many (more than 3-6), conflict with (instead of replacing) current, outdated activities
Strategies

• High level activities needed to reach each goal
• Measurable

**Focus:** What steps can we identify now, and what goals require a strategy of further study and planning?
Strategic Action Plan

• Specific steps
• Who, what, when
• Establish accountability

**Focus:** Roles you are willing to commit to fulfilling
Funding Needs

- The resources needed to accomplish each activity
- Identified over the life of the plan (e.g. three years)

**Focus:** Consider staff, volunteer and monetary needs
Revenue Sources

• Individuals, businesses, foundations, government agencies, earned income, endowment proceeds
• Amount planned from each source

Focus: Build on past history and new directions
Fundraising Activities

• Specific activities for each source
• Amount to be raised through each activity
Funding Action Plan

• Who, what, when
• Activities are spaced appropriately throughout the year

**Focus:** Tie activities to specific goals to meet the mission
Component Samples
Vision Statement

We envision a full service parks and recreation district with facilities and programs to meet the needs of constituents of all ages. A high level of community participation leads to demonstrably better health and a stronger sense of well-being. Parks and recreation activities are served by a nimble and responsive organization able to adjust quickly to the needs of the community and external influences.
Mission

To sustain a viable, fiscally responsible organization that serves our region with recreation and enrichment opportunities.
Goal
Increase offerings through partnerships and improved collaborations
Strategy

Increase access to natural resources
Strategic Action Plan

• Hold Board work session to develop outline of issues and desirable sites for public access
• Engage appropriate property owners and managers, and potential partners
• Initiate semi-annual summits
• Negotiate and enter into appropriate agreements
Funding Needs (year one)

• 42 hours of existing staff time
• $4,000 for facilitator, rooms and refreshments
Revenue Sources

• Unrestricted funds from individual donors
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Fundraising Activities

• Mail campaign
Funding Action Plan
• Develop compelling story and language for campaign focus
• Identify potential donors and develop campaign appeal materials
• Prepare and send mail requests for funding
• Send electronic follow-up reminder
• Make follow-up calls
Action Plan Sections
(resulting from samples above)

Note: final action plans would provide activities for all strategies planned to meet all goals within the strategic plan.
## Strategic Action Plan

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Timeline</th>
<th>Assignment</th>
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</thead>
<tbody>
<tr>
<td>Hold Board work session to develop outline of issues and desirable sites for public access</td>
<td>April 2012</td>
<td>Board and Executive Director</td>
</tr>
<tr>
<td>Engage appropriate property owners and managers, and potential partners</td>
<td>April-May 2012</td>
<td>Jeff, Peggy and Mike (Board) and Tom (Project Manager)</td>
</tr>
<tr>
<td>Initiate semi-annual summits</td>
<td>May 2012</td>
<td>Joan (Executive Director)</td>
</tr>
<tr>
<td>Negotiate and enter into appropriate agreements</td>
<td>Summer 2012</td>
<td>Joan, Tom and Board</td>
</tr>
<tr>
<td>Action Item</td>
<td>Timeline</td>
<td>Assignment</td>
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<td>------------------------------------------------------</td>
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<tr>
<td>Develop compelling story and language for campaign focus</td>
<td>August 2011</td>
<td>Marketing Committee and Development Director</td>
</tr>
<tr>
<td>Identify potential donors and develop campaign appeal materials</td>
<td>September 2011</td>
<td>Board members and all staff</td>
</tr>
<tr>
<td>Prepare and send mail requests for funding</td>
<td>October 2011</td>
<td>Development staff</td>
</tr>
<tr>
<td>Send electronic follow-up reminder</td>
<td>November 2011</td>
<td>Development staff</td>
</tr>
<tr>
<td>Make follow-up calls</td>
<td>Nov. – Dec. 2011</td>
<td>Board members and all staff</td>
</tr>
<tr>
<td>Sign thank you letters</td>
<td>Nov. 2011 – Jan. 2012</td>
<td>Board members and all staff</td>
</tr>
</tbody>
</table>