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# *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 achieved 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

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## *Content Q&A*

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## *Ready to Plan*

Handout

Worksheet

Small Group

## *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*

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# *Plan Approval*

# *A Living Document*

*(or Keeping Your Plan Off the Dusty Shelf)*

- *Accountability*
  - *Assign a manager*
  - *Create work plans*
  - *Reports to the board*

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## *How to get started*

Worksheet

## *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

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

## *Nonprofit Resources*

- *Strategic Planning for Nonprofit Organizations*  
*Michael Allison & Jude Kaye*
- [www.ManagementHelp.org](http://www.ManagementHelp.org)
- [www.NPGoodPractice.com](http://www.NPGoodPractice.com)
- [www.CreateTheFuture.com](http://www.CreateTheFuture.com)

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## Q&A