

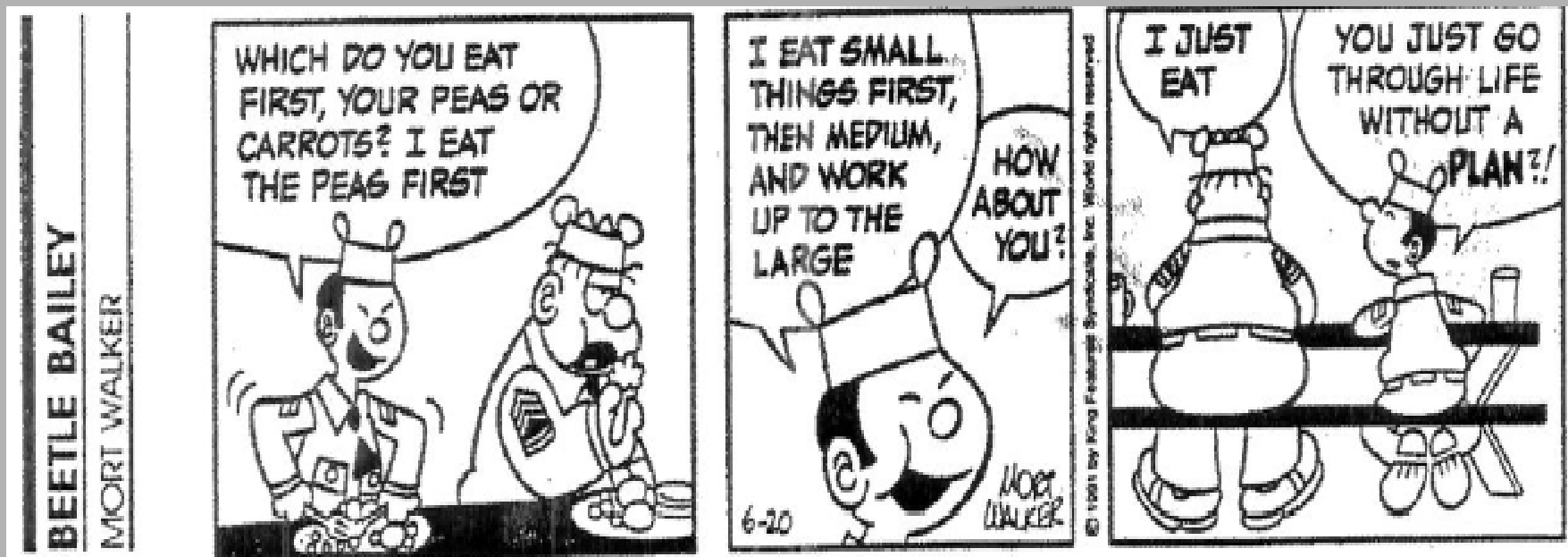


# Strategic Planning

## Approaches

May 2009

# To succeed, we all need a plan. . .



## Strategic Planning: What is it?

The process of developing and maintaining a strategic fit between the . . .

- Mission of the organization
- Strengths and weaknesses of the organization and
- Opportunities and threats presented in the organization's external environment

. . . the process of determining what an organization intends to be in the future and how it will get there.

## Strategic Planning: What is it NOT?

- NOT a plan to raise funds
- NOT an organizational chart
- NOT an operations manual
- NOT an annual budget
  
- NOT a magic wand

## Exercise #1

Working with your neighbors in groups of 3-4:

- 1) Introduce yourself, your agency, and your role
- 2) Present and discuss your agency's MISSION
- 3) Briefly discuss your experience with strategic planning exercises

(6-7 minutes)

## Key Definitions

### **MISSION STATEMENT**

WHY we exist; WHY we're committed

### **VISION**

WHERE we want to go

### **SHARED VISION**

each person's picture of organization at its best as well as shared responsibility for whole

### **GOALS**

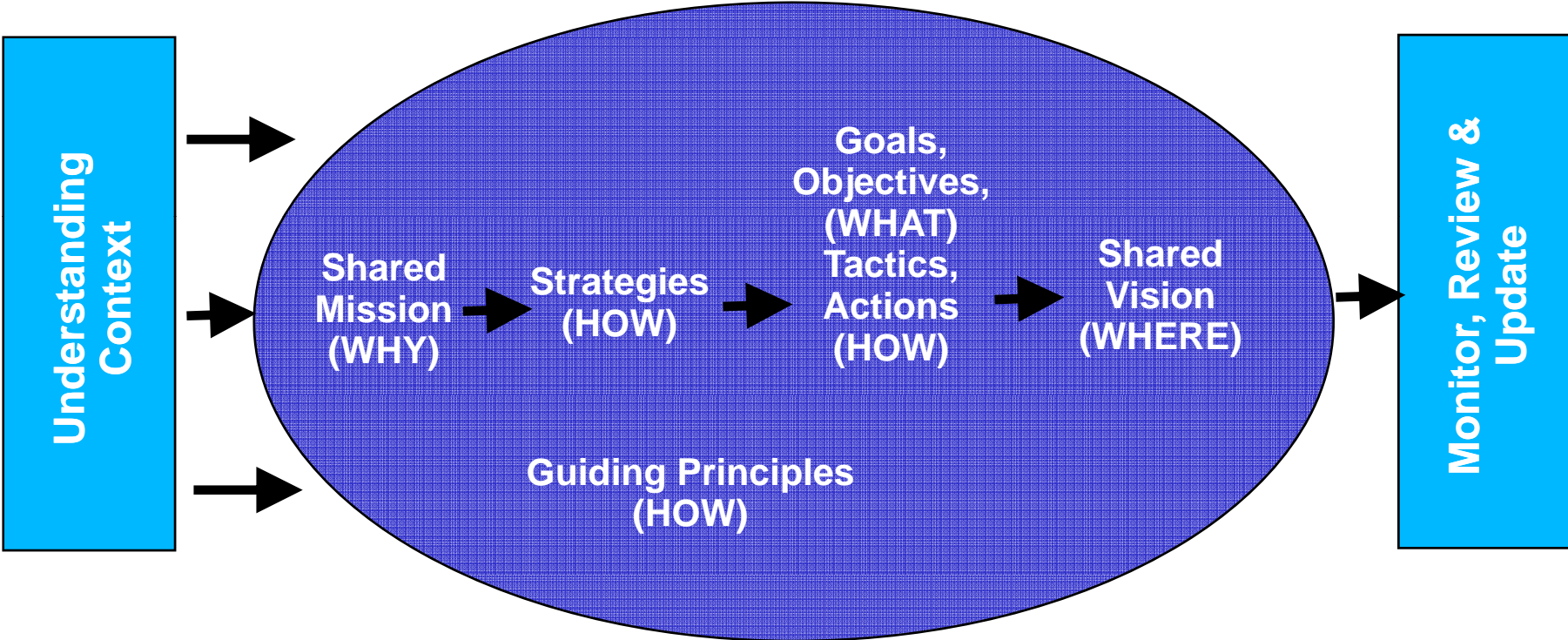
WHAT we need to do to get there; how to close gap

### **CORE VALUES**

HOW we will treat each other and constituents

# Planning Components

Your Nonprofit Organization

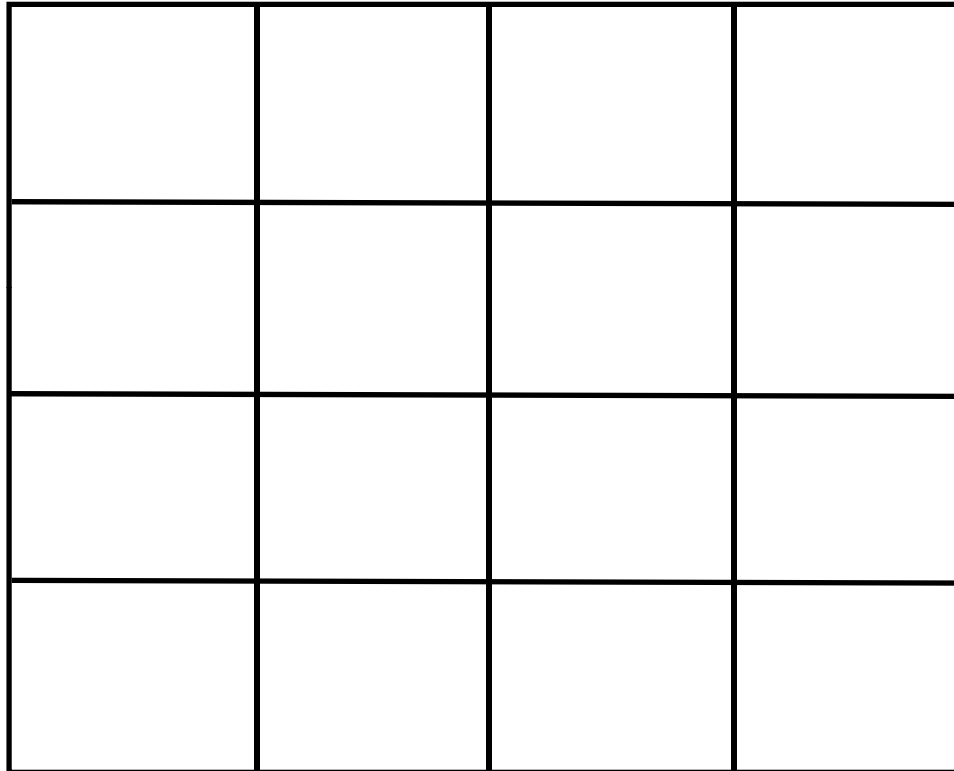


Stakeholders (WHO)

## Strategic Planning: Why do it?

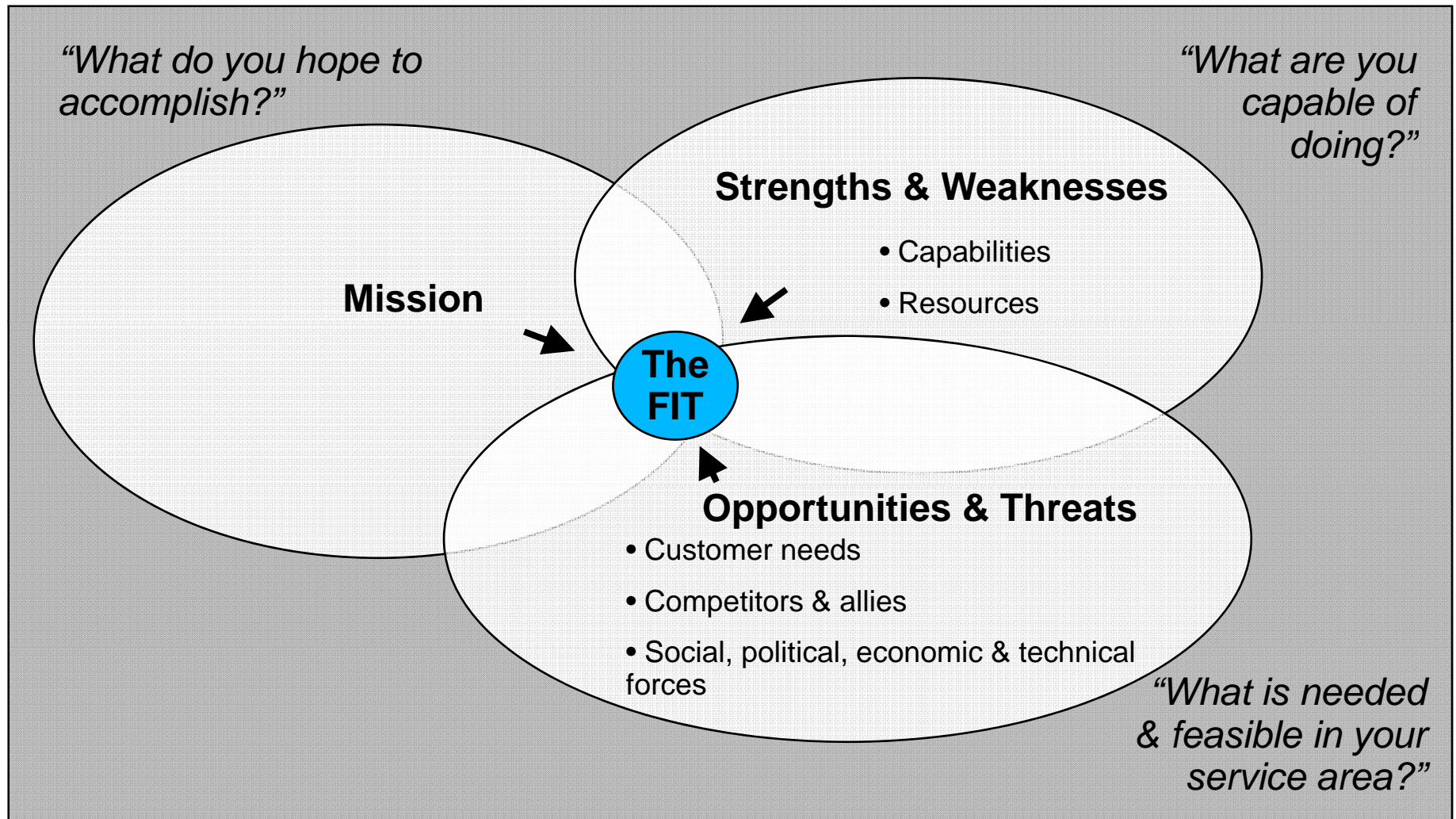
- Creates opportunities to “think outside the box”
- Improves understanding and better learning about the organization
- Builds teamwork among board and staff
- Aligns resources around shared goals
- Enhances organizational capabilities
- Increases effectiveness and efficiencies
- Improves communications and public relations
- Increases political support
- Responds to requirements of funders, government, etc.

**How many squares are there?**



**Answer?**

# Finding the Fit



# SWOT Analysis

## **STRENGTHS**

- capabilities to build on
- knowledge, skills, assets, location, economic

## **WEAKNESSES**

- holes in organization or capabilities
- lack of key resources

# SWOT Analysis

## **OPPORTUNITIES**

- areas for potential expansion or growth
- geographic, programmatic, technical, size/volume, collaboration

## **THREATS**

- external factors to hold you back
- economy, laws & regulations, other agencies

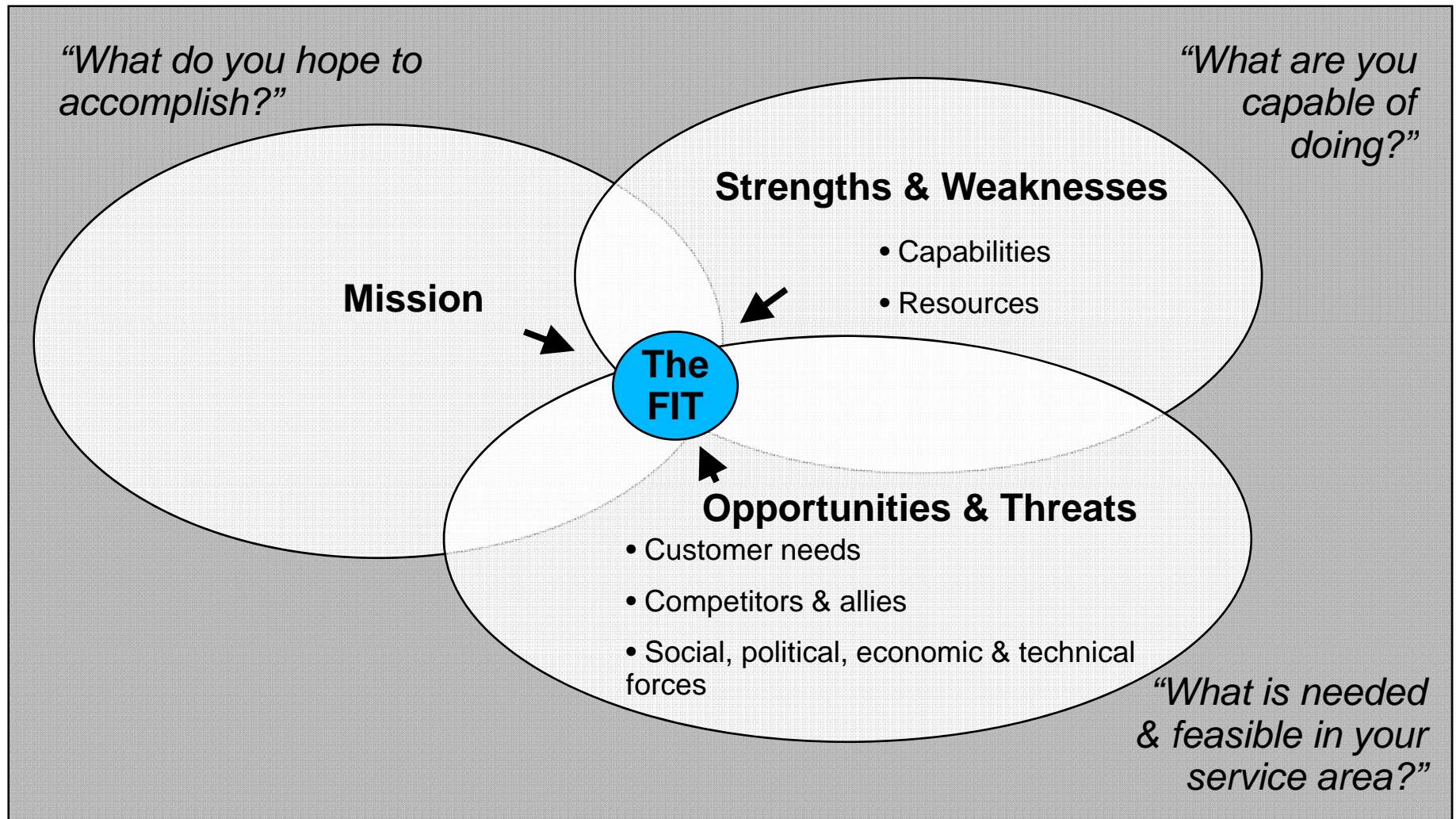
## Exercise #2

Working with the same group, but in subgroups of two:

- 1) **GROUP 1:** Write down three primary **STRENGTHS** and three primary **WEAKNESSES** (internal)
- 2) **GROUP 2:** Write down three primary **THREATS** and three primary **OPPORTUNITIES** (external)
- 3) **TOGETHER:** Discuss

(15 minutes)

# Finding the Fit



## Using SWOT

### **STRENGTHS**

- leverage

### **WEAKNESSES**

- shore up
- collaborate
- remove
- bypass

### **OPPORTUNITIES**

- evaluate for impact
- base on strengths & weaknesses

### **THREATS**

- minimize
- neutralize
- don't ignore!

## Planning Approaches

- 1) 1<sup>st</sup> timers
- 2) Executive Director driven
- 3) Experienced planners

## Simple Plan

- SWOT & Critical Issues
- ED & Board
  
- Mission impact
- Budget impact
- Organizational impact

## ED-Driven Plan

- Experienced ED
- Interviews with Board and community leaders
- Document 3-4 ideas or approaches with pros & cons
- Discuss with Board
- Group work to flesh out leasing candidates

## Setting Direction

### CRITICAL ISSUES

- flesh out SWOT-developed issues
- develop several ways to resolve each issue
- iteratively review and refine
  
- key directions will result from process

## Setting Direction

### SCENARIOS

- 3-4 alternative views of future
- flesh out storylines & headline
- circulate stories and collect reactions
- select best
  
- Focus on plan to “get there”

## Setting Direction

### GOALS

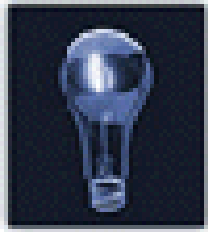
- set several major goals or guidelines
- each program develops plans to contribute
- write plan incorporating each program's approach
  
- achieve overall goals from ground-up

## Setting Direction

### ALIGNMENT

- outline current MISSION, PROGRAMS, & NEEDED RESOURCES
- identify adjustments required to align
- key changes to current operations will result from iterative process

# One-Page Business Plan



**vision**



**mission**



**objectives**

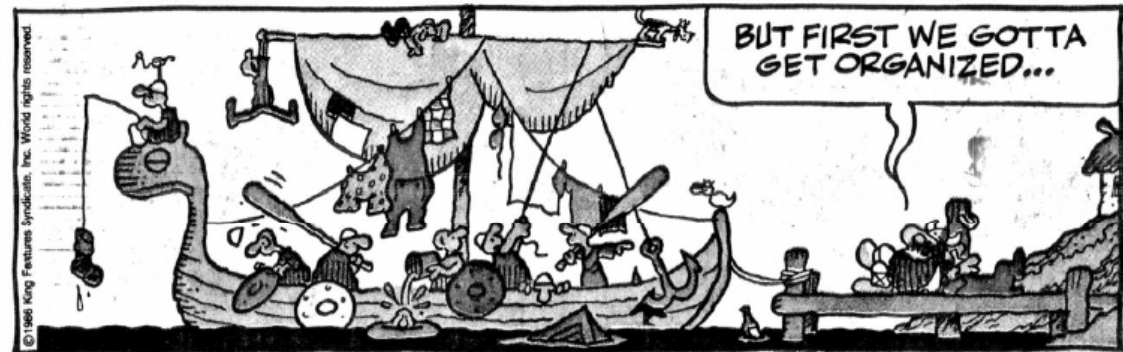


**strategies**



**plans**

Many of us have shared this sentiment . . .



## Participant Roles

- CEO/ED
- Board
- Staff
- Clients
- Funders & contributors

## Strategic Planning: When shouldn't it be done?

- Timing not right – organizational crisis
- Timing not right – leadership change
- Lack of commitment by governance body
- Implementation of plan not likely
- Uninspired team

## Common Questions

- Need versus capabilities
- Process versus “Saturday Board Retreat”
- Business versus NFP plans?
- Social Enterprise or not?



# Strategic Planning

## Approaches

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