



Strategic Planning for Nonprofits

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Lake Buena Vista, Florida

Presenter:

Ben Ramsey, President

GLM Consulting Group, LLC

Raleigh, NC

What is strategic planning?

- **Strategic planning** is an on-going process for formulating, executing, and evaluating the purpose and objectives of the organization, establishing long-term directions, and establishing action plans to achieve those objectives.
- **Strategic planning** is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the future.

Some benefits of strategic planning:

- Provides clear definition of the purpose of the organization.
- Provides a framework for decision making throughout the organization.
- Reveals and clarifies future opportunities and threats.
- Establishes realistic goals and objectives that are aligned with the mission of the organization.
- Ensures the most effective use of organizational resources by focusing the resources on key priorities.
- Provides a basis for measuring performance.
- Serves as a channel of communication.

Key steps in a strategic planning process:

- **Step 1:** Assess Organization's Readiness
- **Step 2:** Formulate Mission and Vision
- **Step 3:** Conduct Environmental Scan
- **Step 4:** Develop Strategies, Goals, and Objectives
- **Step 5:** Write and Communicate the Plan
- **Step 6:** Measure Plan Success

Step 1: Assess Readiness:

- Is organization and its leadership truly committed to the effort?
- Can leadership devote the necessary attention to the process?
- Are there any major issues confronting the organization at present, such as:
 - budget or funding crisis?
 - turnover in key leadership?
 - “turbulent” internal or external environment?

Step 2: Formulate Organization's Mission and Vision

- What is a **mission statement**?
 - It is a brief description of an organization's fundamental purpose. A mission statement answers the question, "Why do we exist?"
- What is a **vision statement**?
 - The vision statement answers the question, "Where do we want to go?"

Step 3: Conduct Environmental Scan

- The environment scan is conducted to collect data and information to answer the question: *What are the driving forces or major influences that might effect the present and future of the organization?*
- The scan should be conducted internally and externally.
 - **Internal scan** – helps you plan for the future by articulating how the organization operates right now. It can reveal trends, irregularities, limitations, and opportunities. To perform an internal analysis, gather information about the organization's strengths and weaknesses, services, programs, activities, staffing, and finances.
 - **External scan** – helps you understand how the organization is perceived externally and what societal factors may affect its future. External factors may include things like the economy, funding trends, demographics, social factors, technology changes, competition, politics, regulatory factors, and public opinion.

Step 4: Developing Strategies, Goals, and Objectives

- **Strategy** – refers to a planned course of action designed to achieve particular goals and objectives of an organization.
- **Goals** – are the general results to be sought.
- **Objectives** – are clearer statements of the specific activities required to achieve the goals.

A Well Define Goal Is: SMART

Specific

Measurable

Achievable

Realistic

Timed

Step 5: Write and Communicate the Plan

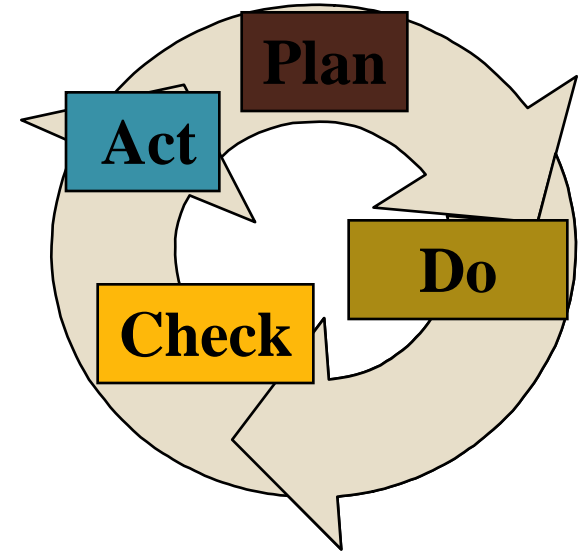
- The written plan should include:
 - An executive summary
 - Strategic planning methodology
 - Current Situation
 - Vision and mission statements
 - Goals, strategies and objectives
 - Required resources
 - Human
 - Technology
 - Financial
 - Policies, procedures and standards
 - Implementation plan

Communicate the Plan

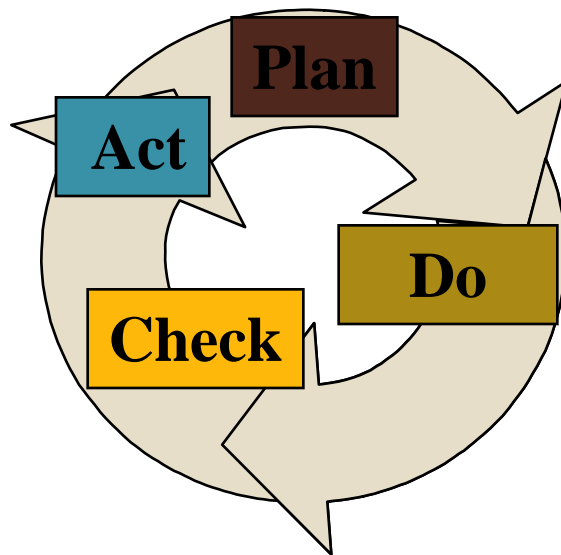
- Communicating the plan involves:
 - Identifying the methods to use to get the word out (e.g., press releases, articles, whitepapers, workshops, seminars, conferences, website, webcasts, podcasts, etc.)
 - Identifying target audience
 - Developing the message

Step 6: Measure Plan Success

- A frequent assessment of progress is necessary in order to ensure that plan objectives are achieved in a timely manner.
- Course correction(s) may be required as new information becomes available or new opportunities or threats develop.



Strategic Planning Model



**Create Mission
And Vision**

**Establish
3-5 Year Plan**

**Develop Annual
Objectives**

**Develop Annual
Work Plans**

**Implement
Work Plans**

**Conduct
Regular Reviews**

Setting Goals and Strategies

“The difference between where we are (current status) and where we want to be (vision and goals) is what we do (target strategies and action plans).”

- **Goals** are simply a clearer statement of the vision mission of the organization - specifying the accomplishments to be achieved if the vision and mission is to become real.
- **Strategies** are clearer statements of the specific activities required to achieve the goals.
- **Action Plan** is a detailed set of statements of the specific actions for accomplishing the goals outlined in the strategic plan.

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