A strategic plan is a roadmap that helps an organization agree on its focus & aims; a multi-year guide

Envision future initiatives + overall steps to achievement:
- goals, objectives, strategies, action steps
- outcomes
- metrics to measure progress
- timelines
- budgets

A successful strategic planning process
- examines internal and external realities
- focuses priorities
- helps anticipate and proactively respond/adapt to change
- long term (2-10 years)
- relatively general in scope
- focuses on broad, long-lasting issues needing extra attention
What are some of the reasons nonprofit boards decide to create a Strategic Plan?

1.
2.
3.
4.
5.

"It’s not a great mission statement, but we’ll revise it if things get better."
Phase 1 – Get Ready
Phase 2 – Articulate Mission, Vision & Values
Phase 3 – Assess Our Situation (where are we now? SWOT/SOAR)
Phase 4 – Agree on Priorities (where do we want to be?)
Phase 5 – Write the Strategic Plan (program, capacity, financing)
Phase 6 – Implement the Strategic Plan
Phase 7 – Monitor, Evaluate & Update the Plan

*evergreen document; not written in stone*

Planning Tips
• Make it clear & achievable
• Action steps, due dates, who’s responsible
• Be realistic with tasks, timelines & assignments
• Remember to revisit & update the plan regularly
<table>
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<tr>
<th>Time</th>
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<tr>
<td>10:00</td>
<td>Welcome / Clarify Today’s Aims</td>
<td>Overview of agenda, purpose of day and process; introductions in order of joining</td>
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<tr>
<td>10:15</td>
<td>Mission Statement Review</td>
<td>What is the current mission statement? What resonates? What may be open for possible revision?</td>
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| 10:30 | Idealized Design: Core Values, Purpose & Target Market | • To what ends are we working? What difference do we want to make?  
• What core values are key to how we operate ideally?  
• Ideally, who benefits primarily? secondarily? |
| 11:15 | Break                                       |                                                                                                                                       |
| 11:30 | External Trends Collaborative Scan          | What’s going on in the world? How does it impact us?  
PEST  Political – Economic – Social - Technological  
What organizations do we/should we partner with? |
| 12:15 | Break to get lunch provided by NPO          |                                                                                                                                       |
| 12:30 | Internal Organizational Strengths & Vulnerabilities | Internally, where are we strong? Where are we vulnerable?  
• Programs & Services  
• Administration & Management  
• Marketing & Outreach  
• Board/Committee Governance |
| 1:15  | Clarify and Prioritize Overall Organizational Initiatives | Based on what we've discussed today, what do we need to accomplish to feel successful - short term? longer term?  |
| 1:45  | Next Planning Steps                         | Long term: Draft today’s discussions into brief written plan  
Short term: FY Budget Review, Discussion, Modifications |
| 2:00  | Conclude                                    |                                                                                                                                       |
• What is motivating our nonprofit to plan, now/soon?
• How much time will planning research & planning deliberations require, over what time frame?
  - Board, senior staff, program staff
  - constituents
  - external community partners
• What is the value-add of hiring a consultant? At what cost?
• How will we communicate the final plan to the public?
• When can the nonprofit readily commit the time & funds?