

STRATEGIC PLANNING



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BOARD RESPONSIBILITIES

1. Ensure Legal & Ethical Integrity
2. Build a Competent Board
3. Determine Mission, Vision & Purpose
Ensure Effective Planning
Monitor Program & Service Quality
4. Protect Assets, Manage Resources Wisely & Ensure Fiscal Oversight
5. Ensure Adequate Resources
6. Enhance the Nonprofit's Public Standing
7. Hire, Support, Monitor & Evaluate the Chief Executive



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



STRATEGIC PLANNING FRAMEWORK

Guiding Principles

3-5 Goals

Objectives, Action Steps

**M
I
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O
N**

Vision

Values

Target Markets

External Trends
SWOT
SOAR

Internal
Strengths &
Vulnerabilities

Collaborative
Partners

**Goal #1
Program A**

**Goal #2
Program B**

**Goal #3
Program C**

**Goal #4
Marketing/Outreach**

**Goal #5
Management &
Governance**

What
Who
By When?

What
Who
By When?

What
Who
By When?

What
Who
By When?

What
Who
By When?

AGENDA – PLANNING SESSION

10:00	Welcome / Clarify Today's Aims	Overview of agenda, purpose of day and process; introductions in order of joining
10:15	Mission Statement Review	What is the current mission statement? What resonates? What may be open for possible revision?
10:30	Idealized Design: Core Values, Purpose & Target Market	<ul style="list-style-type: none"> •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	<p>What's going on in the world? How does it impact us? PEST Political – Economic – Social - Technological</p> <p>What organizations do we/should we partner with?</p>
12:15	Break to get lunch provided by NPO	
12:30	Internal Organizational Strengths & Vulnerabilities	<p>Internally, where are we strong? Where are we vulnerable?</p> <ul style="list-style-type: none"> • 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	<p>Long term: Draft today's discussions into brief written plan</p> <p>Short term: FY Budget Review, Discussion, Modifications</p>
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?

