

# 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

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**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  
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By When?

What  
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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"> <li>•To what ends are we working? What difference do we want to make?</li> <li>•What core values are key to how we operate ideally?</li> <li>•Ideally, who benefits primarily? secondarily?</li> </ul>
11:15	Break	
11:30	External Trends  Collaborative Scan	<p>What's going on in the world? How does it impact us?</p> <p>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"> <li>• Programs &amp; Services</li> <li>• Administration &amp; Management</li> <li>• Marketing &amp; Outreach</li> <li>• Board/Committee Governance</li> </ul>
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?

