

WEBINAR

Strategic Planning for Nonprofits: Navigate the Future with Confidence

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STRATEGIC SOLUTIONS



What is Strategic Planning?

Strategic planning is a process by which an organization articulates where it wants to be and how it will get there.



Strategic Planning

During the process, the organization will:

- Assess its environment (internal and external)
- Affirm its mission and vision
- Set goals to achieve the vision
- Select strategies to accomplish the goals
- Define action steps to implement the strategies
- Document and formally adopt the plan

Strategic Planning Cycle





Why Plan?

5 Key Reasons

WHY PLAN?

**Because our
biggest funders
said we should?**



WHY PLAN?

5 Key Reasons

1. Encourage leaders to see the bigger picture
2. Create a shared vision for the future
3. Provide a path forward to achieve the vision
4. Provide a framework for decision-making
5. Focus resources where they will have the highest impact on mission



WHY PLAN?

Decision-making

Strategic planning provides a framework for decision-making

- During the planning process
- As decisions need to be made in the future



WHY PLAN?

Focus on IMPACT

Allocate resources to activities that will have the greatest impact on your mission



Who Should Be Involved?

- Board
- CEO/Executive Director
- Staff
- Clients
- Volunteers
- Donors
- Other key stakeholders



10 Basic Steps

1. Assess the environment
2. Affirm the mission and vision
3. Set goals and measurable objectives
4. Select strategies
5. Define action steps
6. Document and adopt plan
7. Allocate resources
8. Implement
9. Evaluate progress, make course corrections and celebrate success
10. Update the plan



Assessment

Scanning the environment

- Internal scan
- External scan

Situational analysis

- SWOT

Organizational assessment



Internal Scan

Gather information inside the organization:

- History, mission, vision, values
- Programs (reports, client surveys)
- Leadership (Board self-assessment)
- Personnel (performance reviews, staff and volunteer surveys)
- Finances (financial reports, anticipated needs)
- Past strategic planning efforts (outcomes from implementation)

External Scan

Gather information outside the organization “PESTLE”

- Political
- Economic
- Social
- Technological
- Legal
- Environmental

Gather information outside the organization

- Competitive Considerations
- Community Needs Assessment

Scanning the Environment

- Internal Scan
- External scan
- SWOT
 - Build on strengths
 - Take advantage of opportunities
 - Mitigate threats
 - Address critical weaknesses

SWOT ANALYSIS

	Helpful to achieving the objective	Harmful to achieving the objective
Internal origin (attributes of the organization)	S Strengths	W Weaknesses
External origin (attributes of the environment)	O Opportunities	T Threats



Align the Plan with Mission and Vision

Strategic planning is a means to an end: fulfilling the mission and achieving the vision.

Mission Statement

- Review the mission statement
- Ask:
 - Is our mission still relevant?
 - Have we experienced mission drift?
 - Are the words used to describe our mission appropriate?
- Update the mission statement if necessary

Vision Statement

- Review the vision statement
- Ask:
 - What does the world look like if we have fulfilled our mission?
 - What would we say if our organization was no longer needed except to maintain the status quo?
 - Are the words used to describe our vision appropriate?
- Update the vision statement if necessary

Create a Shared Vision for the Planning Period

- The strategic planning horizon varies but is often 3-5 years.
- Define your vision for the future, five years from now
- Note: The shared vision for the plan is not likely to be the organization's vision statement





Dream!

- Where do we want to be in five years?
- How will our organization differ from today?
- How will the world be different as a result?
- What will we have achieved in 3 - 5 years' time?

Set Goals and Objectives

- Prioritize what you want to achieve in the next five years
- Ambitious yet realistic
- Set goals in the functional areas
- Set measurable objectives for each goal

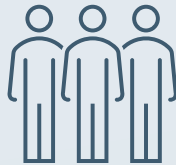


Functional Areas

Set Goals in the following areas



Programs



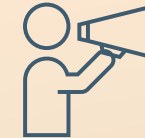
**Human
Resources**



Facilities



Fundraising



Marketing

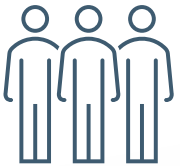


Governance

Sample Goals



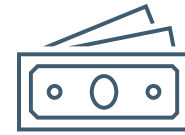
Programs: The organization will expand its programs to serve more clients.



Human Resources: The organization will expand its pool of active volunteers.



Facilities: Develop a definitive plan for building renovation and expansion.



Fundraising: The organization will increase annual net income.



Marketing: The organization will increase brand awareness.



Governance: The Board will increase its efficiency.

Goal vs. Objectives

Goals

- Broad, overarching
- General intentions
- Intangible
- Abstract
- Difficult to measure

Objectives

- Narrow, specific
- Precise
- Tangible
- Concrete
- Measurable

Sample Objectives

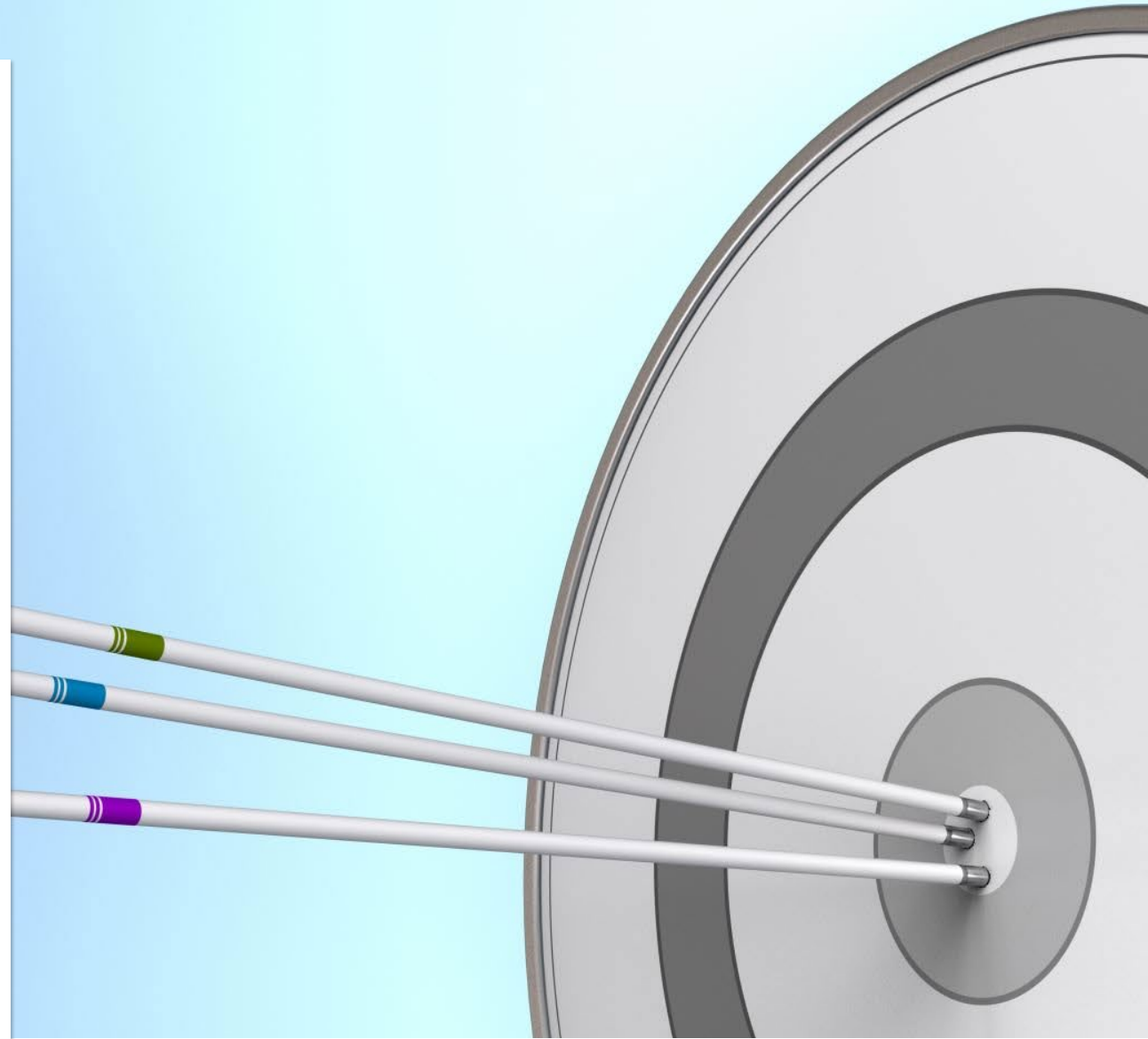
HUMAN RESOURCES

Goal 1. The organization will expand its pool of active volunteers.

- **Objective 1.1.** At least 80% of existing volunteers will provide service in the 12 months ending 6/30/25.
- **Objective 1.2.** The organization will enroll at least 60 new volunteers by 6/30/25.
- **Objective 1.3.** At least 80% of new volunteers will provide service in the 12 months ending 6/30/25.
- **Objective 1.4.** The number of volunteers providing service will increase by 20% year over year in FY 2025, 2026 and 2027.

SMART Goals and Objectives

Specific
Measurable
Attainable
Relevant
Time Bound



Using Benchmarks

Benchmarks can help you break objectives into smaller chunks.

- Create shorter timelines
- Break targets into smaller quantities

Why

- Measure progress sooner
- Make course corrections before significant resources are wasted
- Celebrate success at more frequent intervals to boost morale and maintain focus

Sample Benchmarks

HUMAN RESOURCES

Goal 1. The organization will expand its pool of active volunteers.

Objective 1.2. The organization will enroll at least 60 new volunteers by 6/30/25.

- **Benchmark 1.2.1.** At least 20 new volunteers will be enrolled by 12/31/24, as evidenced by volunteer enrollment forms.
- **Benchmark 1.2.2.** At least 40 new volunteers will be enrolled by 3/31/25, as evidenced by volunteer enrollment forms.
- **Benchmark 1.2.3.** At least 60 new volunteers will be enrolled by 6/30/25, as evidenced by volunteer enrollment forms.

Define Strategies

- How will you achieve your goals?
- Anticipate the resources needed and impact to be realized
- Question, challenge and reframe
- Align ideas, engage in dialogue and build consensus
- Select the strategies for your plan



Sample Strategies

HUMAN RESOURCES

Goal 1. The organization will expand its pool of active volunteers.

Objective 1.2. The organization will enroll at least 60 new volunteers by 6/30/25.

- **Strategy 1.2.a.** Decrease the lag time between a volunteer's first contact with the organization and the date the enrollment process is initiated.
- **Strategy 1.2.b.** Streamline the enrollment process to provide a faster and easier enrollment experience for the new volunteer.

Action Steps

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"I'm here about the details."

Sample Action Steps

HUMAN RESOURCES

Goal 1. The organization will expand its pool of active volunteers.

Objective 1.2. The organization will enroll at least 60 new volunteers by 6/30/25.

- **Strategy 1.2.b.** Streamline the enrollment process to provide a faster and easier enrollment experience for the new volunteer.
 - **Action Step 1.2.b.i.** Make the enrollment packet available on the organization's website with an option to complete and submit the forms electronically.
 - **Action Step 1.2.b.i.** Contact new volunteers within 24 hours of receiving their enrollment packet to schedule their interview.

Document and Adopt Plan

- Document the plan in writing
- Submit to Board for review, feedback and approval
- Allocate resources
- Begin implementation



Implementation

- Create strategic implementation teams
- Carve out time
- Evaluate progress at regular intervals
- Make course corrections
- Report on progress
- Celebrate success!





Variations in Strategic Planning

- Find the right fit for your organization
- Simple to complex (and everything in between)
- One day to many months
- Board input to community input
- Single plan to multiple plans for related organizations
- Short document to large binder
- No cost to tens of thousands of dollars



Creating “Buy-in”

- Articulate the benefits of planning
- Engage stakeholders at every level
- Choose the right variation
- Use a skilled facilitator
- Build consensus
- Report progress at regular intervals

THANK YOU

IMPACTability@SoukupStrategicSolutions.com

(239) 234-5596

www.SoukupStrategicSolutions.com

