Fundamentals of a Successful Strategic Plan

Presented by:
Wilhelmina L. Tribble, CEO LTA, Inc.
Christopher Noe - Director of Social Investment at Nonprofits First
Our Agenda

- Planning for the Strategic Plan
- Who is involved?
- Strategic Plan outline and content
- Questions
Statistics on Nonprofits

- 14% implement strategic plans
- 50% with a strategic plan are more likely to be sustainable
- 50% more likely to stall if the strategic plan is a bad plan

Source: Peter York of the TCC Group 2013
Quality of the Plan matters
What is Strategic Planning?

Why do organizations need Strategic Planning to be a dynamic and sustainable organization?
Definitions of Strategic Planning

A management tool to clarify agency mission, vision and priorities in response to a changing environment

A methodology for decision makers to focus on the most critical agency issues

A strategy to develop support among key stakeholders

An agenda to move toward the future and develop an action plan for getting there
Are you ready?

- Leadership commitment
- Strategic thinking staff
- Broad-based involvement
- Balance of past and future
- Knowledgeable management
- Commitment of time and resources
- Follow-through on action plans
Before you begin......

Five questions to ask and answer
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<tr>
<td>1.</td>
<td>Purpose, mission, vision, values?</td>
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<td>2.</td>
<td>Community’s current needs? Are we aligned?</td>
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<td>3.</td>
<td>What are we trying to accomplish?</td>
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<td>4.</td>
<td>Our relationship to the community?</td>
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<td>5.</td>
<td>Who do we need to do this?</td>
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The Plan
Table of Contents

1. Introductory Statement
2. Background statement/history
3. Management Board and Staff
4. Organizational Tenets
   4.1 Organizational Vision
   4.2 Mission Statement
   4.3 Values
5. SWOT Analysis
   5.1 Strengths
   5.2 Weaknesses
   5.3 Opportunities
   5.4 Threats
6. Major Goals
   6.1 Specific Objectives
7. Evaluation
   7.1 Formative Evaluation
   7.2 Summative Evaluation
1. Introductory Statement

This strategic plan has been developed by XYZ group in order to provide a disciplined approach to the management of XYZ group over the next ABC period of time.
2. Background statement/history

- When formed and why?
- What led to it being formed?
- What key changes have occurred since it was formed?
Background statement/ history (con’t)

- How is it governed and staffed?
- What support is received from which agencies and what level of support has been received?
3. Management Board / Staff

- List of who is who.
- Organizational chart.

Consider having biographical details about each person or even a photograph and contact details.
4. Organizational Tenets (VMV)

a) Vision: Want to become

b) Mission: What want achieve

c) Values: Standards of belief you adopt which shape the way you are seen and behave as a nonprofit.
4.(a) Vision

Short.

- Tells what you really, really want to be.
Sample Vision Statements

**Vision:** To end the cycle of poverty for the families we serve in South Florida.

**Vision:** A community in which all nonprofits reach their highest level of success.
4.(b) Mission

Contains three things:

1. What (you do)
2. Who (you do it for)
3. Why/How (you do it)
Sample Mission Statements

**Mission:** Promote quality and accountability in our nonprofit community through education, leadership development and management support services.

**Mission:** To upgrade the health, education and living standards for the children and families of agricultural workers, laborers and the underserved.

(Missing one component. Which one?)
4. (C) Values

Standards of belief you adopt which shape the way you are seen and behave as a nonprofit.
Sample Values

1. We put our clients first.
2. We value the pursuit of excellence.
3. We conduct our programs in a professional, ethical and responsible manner.
4. We treat each other with dignity and respect.
5. We encourage the personal and professional growth of our staff.
6. We are committed to inclusion & diversity.
7. We actively support our communities.
Factors in Selecting Strategic Priorities

Most:

- Relevant to the agency’s mission.
- Essential to support long term viability.
- Practical, feasible, and achievable next 1-3 years, 3-5 years.

Reality check—Most realistic.
5. SWOT Analysis

a) Strengths
b) Weaknesses
c) Opportunities
d) Threats
### 6. Major Goals

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<th>Strategy</th>
<th>Action Step</th>
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<th>Evaluation</th>
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Analyze Scan & Select Strategic Priorities

- How do the major issues raised by the assessment, impact the agency?
- Do they overlap and intersect with each other?
- Are there some issues which are driving the others?
7. Evaluation

a. Formative Evaluation

b. Summative Evaluation
7. (a) Formative Evaluation
7 (b) Summative Evaluation

- Against which criteria, will this final evaluation occur?
- To what extent has your operational plan addressed your strategic plan?
- How can you use the information you have gathered for the next cycle of strategic planning?
7 (b) Summative Evaluation (con’t.)

- How valid are the tenets (MVV) you have operated under for the duration of the strategic plan?
- Do they still apply?
- If not, how and why should they be revised?

End
Developing Your Action Plan

- Clearly articulate the problem statement or issue
- Identify person responsible for each strategic goal
- Set timeframes for each goal. Define how to monitor and measure progress toward each goal
- Identify resources, major challenges and basic action steps for each goal
Developing Your Action Plan

- Consider alternative strategies or contingencies
- Identify resource needs for each goal (including staffing, funding, etc.)
- Identify benchmarks for measuring success
What are Scan Factors?

- Economic issues
- Board and staff leadership
- Client demands
- Competition for resources
- Recruitment and retention of staff
- Funding sources
- Outcomes of programs and services
- Facilities
- Training and education
How Do You Determine What is Relevant to the Agency’s Mission?

- Congruent with the agency’s mission?
- Necessary to support the agency’s other programs and services?
- Produces measurable results?
- Fills an unmet need in the community?
- Enhances services currently provided by others in the community
- Increases the agency’s visibility and impact?
Questions