



Planning for nonprofits and philanthropy

Strategic Planning 101

FOR NONPROFIT PROFESSIONAL AND VOLUNTARY LEADERS

June 2014

Major Elements of a Strategic Plan

Mission + Vision

Goals (3-5)

Objectives (3-7 per Goal)

Tactics (several per Objective)

- Responsibility
- Timetable
- Costs / Sources
- Outputs / Outcomes

Strategic Planning starts with visioning which is the job of imagining the future. Rooted in mission, which is the business of an organization, a vision describes its future position: what a nonprofit hopes to achieve through its work after a specific period of time.

And visioning is a weighty task because the Strategic Plan itself is designed to get you to that imagined future. Sharing the vision across an institution – from board to staff, from administration to program staff – is important because it gets everyone moving in the same direction.

But consensus on vision can be difficult to achieve. Word choices get in the way (e.g. “the finest...” or “one of the finest...”). A strong voice can overpower (e.g. a founding director or deep-pocketed board member). Discord can dispirit and undermine the outcome.

The art behind visioning is the art of finding common ground among many voices. When you begin crafting the vision itself, leave specific word choices for later. Respect the role that leaders are expected to play as, well ... leaders. And help outliers accept the emerging direction the vision is beginning to take. Everyone can't have their way.

An agreement on vision, however fraught, is a threshold step in Strategic Planning. Cross that threshold and the rest of the work gets easier. Endorse the vision and take a moment for self-congratulation; you've already accomplished something important together!

In a sea of competing priorities, **setting a small number of major goals is Step #2** in Strategic Planning 101. It is the very act of reducing the many possibilities and good ideas to a pointed handful of inspiring goals that gives the nascent Strategic Plan its shape and character.

A goal is a statement of an expected outcome. It provides programmatic direction and responds to the analysis of the organization's internal strengths and weaknesses, and the external threats and opportunities.

Some institutions set broad goals that serve as guiding themes across the entire institution (e.g. increased diversity, enhanced stature); and others set goals that tie directly to individual departments so it is clear from the very beginning who is responsible for each goal (e.g. improved student retention, efficiency in business practices). Which approach you choose matters less; but focusing on a few rather than many goals matters an awful lot.

Goals should be written to move in two directions. They should aim up in support of the vision, and they should filter down to inform the objectives and tactics (the actual work you will do) that make up the substance of a Strategic Plan.

Along with a vision statement, your goals become the “Cliff’s Notes” that communicate your strategic intention. Recite the vision and those few major goals, and you should capture the essence of your Strategic Plan. Your goals need to be smart, inspiring, inclusive...and measurable, so they are achievable.

In Strategic Planning, a vision can be big and abstract (e.g. “We will ensure equal access to opportunity to every member of our community...”). Goals can be broad and inclusive (e.g. “We will improve employment opportunities and job retention...”). But when it’s time to develop objectives and tactics – the real work ahead! – it’s time to get specific.

Objectives are strategies designed to focus an organization’s goals and define the commitment of the organization to achieve specific, measurable results over a three-to-five year period. For each major goal in the plan a small number of objectives is set by individual managers, departments and the board. These objectives should be clearly-worded and realistic but contain five specific elements:

- Target of change (a population or condition)
- Responsibility (for implementation and measurement)
- Time frame (for implementation and results)
- Measurement criteria (how will outcomes be evaluated, and what is the current baseline?)
- Outcomes to be achieved (how far will the needle move?)

There’s one step beyond setting objectives: enumerating specific tactics or actions. Like any work plan or set of instructions, the tactics in a Strategic Plan can be granular, laying out the individual actions that those responsible should undertake.

Thinking step-by-step comes naturally to some, and not so much to others. But designing clear, realistic and measurable objectives and tactics is terribly important to the success of a Strategic Plan and the vision and goals that guide it.

Strategic Plans are hardly strategic if you haven't engaged the folks who need to “own” the plan, and carry it out. That is, the board and staff! Ditto if you haven't effectively touched the community or audience you are benefiting as a nonprofit – your visitors, clients, students, patients, campers, patrons. They should have a stake in your success.

In a good Strategic Planning process, you can align the plan with your stakeholders, internal and external, by building a planning committee that fairly represents them. Ideally six to eight individuals (larger in academic institutions) that includes members of the board and staff, and several outsiders who can offer a range of perspectives and represent different constituents. Everyone benefiting from the plan should recognize that someone they respect has a seat at the table.

Then, fuel interest in the plan across your nonprofit through periodic communications that keep the community abreast of the progress and milestones (e.g. approval of a vision statement; agreement on key goals). When your board approves the final plan, there should be little surprise about its direction. Instead there should be excitement and ownership. Let's get going!

Think strategically all the time, especially when you map out a planning process. Aligning your board, your staff and your community with the developing plan is strategic ... and essential to your long term success.

Your board-approved Strategic Plan should be a step-by-step roadmap for your nonprofit's work over a three-to-five year period.

Think about your Strategic Plan the way you would a giant spreadsheet where every cell needs to be populated. Be certain you're clear about specific actions to be taken, and who's responsible for what ... and by when. Make sure you've spread responsibility for implementation so everyone in your organization has a stake in your Strategic Plan's success. Attach names and titles to every action so it is clear where every buck stops.

Estimate the financial resources you'll need and indicate their sources (e.g. operating surplus, one-time board gifts, new grant funds). Your Strategic Plan should dovetail with your projected budget and fundraising goals so your board, executive leadership and fundraising staff understand the work ahead.

Then, set aside time to think through – specifically – how you'll measure the success of every action you have planned. Now's the time to clarify exactly what's expected, short- and long-term. A good set of measures will also come in handy because they provide the board and staff with opportunities to celebrate success as each milestone is met.

For nonprofits tied to accreditation and review process (e.g. museums, colleges and universities, independent schools), clearly measurable outcomes and outputs are a must.

But what if you miss the mark? That's inevitable. And that's why good Strategic Plans are flexible plans, made for course correction.

Strategic Planning 101: Plans are made to be changed!



Strategic Plans should never be “set in stone” Good plans are living documents, designed to be amended over time.

Strategic Plans are “built” from vision on down, in part to allow for flexibility in execution. Your vision and the major goals that follow are the “constants” over the life of a plan. Together they signal where you intend to go as an institution or organization over the period of the Plan.

But the specific objectives and tactics that you will employ to reach your goals (and to realize your vision) can shift over time. In fact, they inevitably will. Opportunities arise and challenges must be met. Your vision and goals – the constants – help you decide when to say “yes” and when to say “no” to opportunity. And they help you focus on your priorities in times of adversity.

Here are ten events in the lifecycle of a nonprofit that can impact your Strategic Plan: a leader departs, board composition alters, a funding opportunity arises, a new program is imagined, a bequest comes your way, legislation is passed, new staff bring new ideas, a merger becomes possible, the political environment shifts, the economic outlook changes.

You must adjust your plan to accommodate events like these.

Here’s one way to do it: Keep your planning committee intact and schedule periodic meetings to review progress and consider amendments. Or designate a board committee or senior staff team to take on this responsibility.



About Us

Plan A Advisors

Plan A was founded in 2013 by Evan Kingsley and Adam Gaynor as a new kind of **consulting** practice to design and facilitate **highly individualized** approaches to the unique needs of clients, their audiences, leadership, and financial and organizational platforms.

Together they have more than **40 years of experience** in nonprofits, social enterprises, philanthropy and organizational development across the **widest range** of organizations, institutions and philanthropies.

Plan A works with the **board and executive leadership** of agencies, institutions, organizations and funders to design the most **effective and efficient paths** to setting and meeting **realizable goals**, driven by a **strong and compelling vision**.

Plan A projects include **strategic and business planning, governance, mergers and fundraising**.



Ready to set an introductory meeting? Please get in touch. We welcome your inquiry and take great pride and pleasure in guiding you and your organization to the right solution for your needs.

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