



Strategic Planning For Nonprofit Organizations

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Strategic Planning Topics

1. Strategic Planning Defined
2. Why Plan?
3. Benefits & Limitations
4. Strategic Planning Steps
5. Alignment of Outcomes
6. Resources for Success

Strategic Planning Defined....

- ❑ **Strategic Planning** is the process by which the guiding members of an organization envision its future and develop the necessary plans, procedures and operations to achieve that future. (*Goodstein, Nolan and Pfeiffer, Applied Strategic Planning*)
- ❑ **Strategic Planning is** a) the process of determining what an organization intends to accomplish in the future, and b) how it will get there. (*Barry, Bryan – Strategic Planning Workbook*)



What do you
plan for ???



If planning does
not guarantee
success, why do
it?

Benefits and Limitations of Strategic Planning....

BENEFITS OF STRATEGIC PLANNING

1. **Improve performance**.....given that planning and vision have power!
2. **Stimulate thinking and clarify future direction**, by minimizing "organizational wandering", crisis management and preoccupation with day-to-day operations vs. long term goals.
3. **Successfully address organizational problems** by focusing on **priority critical issues**.
4. **Build teamwork and group dialogue**..... Which may lead to improved organizational communication, sense of community, shared vision, etc.
5. **Maximize an organization's ability to influence**, rather than be influenced. This allows an organization to be proactive rather than reactive.

Limitations of Strategic Planning

The positive outcomes of strategic planning are limited (sometimes negated) when....

1. “Life threatening” problems need to be addressed first.....a time of crisis is not a good time to plan!
2. Poor planning is likely.....not enough time is designated, poor data/information is used, participants are not committed to the process, etc.
3. Implementation is unlikely.....no intention of leadership to follow through with the outcomes of the planning process.

Given Barry's strategic planning definition...
Strategic Planning is a) the process of determining what an organization intends to accomplish in the future, and b) how it will get there....

1. What time-frame is "the future"?
2. How long does it take to complete the Strategic Planning process?
3. How many individuals should be on the Strategic Planning Team? Who should be a member?
4. Who should facilitate the Strategic Planning process?

Strategic Planning Steps (12):

STEP ONE: Create and Organize the Planning Process.

- * Develop a customized planning process and timeline
- * Gain agreement on the planning process from internal and external decision-makers
- * Create and orient the Strategic Planning Team

STEP TWO: Clarify the Current Organizational Mission.

- * Review the current vision and/or mission of the organization

STEP THREE: Identify Organizational Constituents.

- * Identify which groups, organizations, etc. effect or are affected by, the organization.

Strategic Planning Steps (Continued)

STEP FOUR: Clarify Organizational Mandates.

- * Identify formal and informal constituent mandates
- * Determine what is and what is not expected of the organization based on these mandates

STEP FIVE: Assess the Internal Environment.

- * Identify and explore internal organizational strengths and weaknesses

STEP SIX: Assess the External Environment.

- * Identify and explore external threats and opportunities

Strategic Planning Steps

STEP SEVEN: Create a Vision of the Future.

* Visualize and document a proactive vision for the organization's future.

STEP EIGHT: Identify Critical Organizational Issues.

* Based on earlier steps, develop and prioritize critical issues needing to be addressed

STEP NINE: Develop Goals to meet Critical Issues.

- Identified critical issues are turned into proactive issue goals

Strategic Planning Steps (Continued)

STEP TEN: Formulate Objectives to Meet Goals

*Develop SMART objectives for each goal

STEP ELEVEN: Identify Evaluation Processes

* Identify how and when progress toward addressing critical issues is evaluated

STEP TWELVE: Create and Disseminate the Plan

- * Write draft plan/planning team members review it
- * Complete final plan
- Disseminate for implementation by the Board, Committees, Staff, etc.

Alignment Organizational Resources with the Plan

What does it mean to align the strategic plan with:

1. Staff
2. Board
3. Budget
4. Volunteers
5. Technology
6. Policies
7. Other Organizational Resources???

To be successful, ideally Strategic Planning should be.....

- Deliberate
- Thoughtful
- Inclusive
- Representative
- Grounded in Vision and Mission
-And must lead to Action!

Strategic Planning Resources (A Sample of Online Resources)

- Minnesota Council on Nonprofits:
<https://www.minnesotanonprofits.org/resources-tools>
- BoardSource
<https://boardsource.org>
- Managementhelp.org
<http://managementhelp.org/strategicplanning/>
- Strategic Planning Models:
<https://managementhelp.org/strategicplanning/models.htm>