

# **Crafting a Strategic Plan That Works**

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# Why Plan?

- Commit to a vision for the organization and its future, in the context of ever-changing external factors
- Clarify direction and set goals (that lead to more detailed objectives and intentional activities) to further the mission of the organization
- Build something more than a “wish list” or a “to-do list”; rather, engage a process that garners the buy-in necessary to effective implementation of purposeful work
- Provide a platform for making quality decisions, creating accountability and conducting evaluation

# **“By-Products” of Planning**

- The plan document provides a tool for saying “no” to distracting opportunities
- Planning is a highly-effective way to demonstrate to external audiences that the organization has thought about issues of sustainability, and is cognizant of the need to consider its future

**Strategic Planning addresses the organization's concerns regarding:**

- Future**
- Vision and Direction**
- Responsiveness to Environment**
- High-Level Goals**
- Sustainability**

# Types of Planning

- Action
- Special Project
- Strategic
- Contingency (If A, then B...)
- Scenario (A, B...)

# The 12 'How' Steps to Strategic Planning

1. Determine a small committee to lead and guide the planning process
2. Set goals for engaging the strategic planning process
3. Identify and gather all external and internal information/data needed to inform the planning and decision-making processes

# The 12 'How' Steps to Strategic Planning

4. Find and take the time to get people together to sit down and discuss the organization's future
5. Affirm the organization's mission and values, and their relevance in the context of current/ emerging external realities
6. Set a vision for the future

# The 12 'How' Steps to Strategic Planning

7. Discuss and commit to pursuit of broad goals that directly manifest the organizational mission and values
8. Follow up by developing a short-term (e.g. one year) action plan that outlines SMART (specific, measurable, action-oriented, reasonable, time-bound) objectives, benchmarks and timelines, assigned personnel, and evaluative metrics and methods
9. Don't ignore the numbers! Draft budgets that reflect the financial realities of the strategic and action plans to be implemented

# The 12 'How' Steps to Strategic Planning

10. Commit the strategic and action plans to writing, knowing that the document's content is "fluid" and will change over time
11. Ensure alignment of strategic plan with operational documents and practices – e.g. job descriptions, performance evaluations, financial budgets etc.
12. Determine a schedule for periodic Board of Directors' check-ins with the plan document (e.g. quarterly), making necessary modifications as needed

# **‘Who’ Is Involved in the Strategic Planning Process?**

- Board Members, Other Volunteers
- Staff Members
- Other Stakeholders – e.g. Clients, Partner/Collaborating Organizations, Funders, etc.

# **Strategic Planning Readiness Survey**

- 1. Our organization has a relatively stable team of employees or volunteers.**
- 2. Our team has indicated a preference for having a clear roadmap of where we're going, as opposed to enjoying the process of 'winging it.'**
- 3. Our organization is not currently facing any urgent crises that could derail the benefits of long-term planning.**
- 4. Our organization is in a good position to meet its short-term financial commitments.**

- 5. Each team member has personally committed the time required to complete a strategic planning process.**
- 6. We believe we possess – or have access to – the skills necessary for effective strategic planning (tools, facilitators, etc.).**
- 7. We're going through strategic planning because we really want to, not because a funder told us we have to.**
- 8. There is a clear and present need to undergo strategic planning right now.**

9. Our team has unanimous agreement about what we hope to accomplish during a strategic planning process (the terms are well defined).
10. Our organization has lots of opportunities, but we're having trouble deciding which ones make sense to pursue.
11. Our organization's goals and strategies aren't especially well defined right now.
12. On our planning team, we have a good mixture of big picture thinkers and detail-oriented people.

- 13. Roles and responsibilities are not clearly defined in our organization right now.**
- 14. It has been a fair amount of time since we have asked our stakeholders (clients, partners, funders, etc.) what they would like to see from our organization.**
- 15. Our organization currently lacks the necessary systems to measure progress and results.**
- 16. We seem to be working hard, but sometimes find ourselves – and our organization – spinning around in circles.**

- 17. Undergoing an in-depth planning process right now will not put our organization at risk of missing important opportunities, alienating clients, or falling short on projects.**
- 18. We are not considering strategic planning simply as a 'stall tactic' or as a means of deferring action.**
- 19. We want to control our organization, not have our organization control us.**

# **Discussion/Decision Points and Plan Document Content**

# **Executive Summary**

## **Organizational Background**

- Mission Statement
- Vision Statement
- Statement of Values and Culture
- Governance and Leadership
- Programmatic Objectives

# **External Analysis: Opportunities and Threats, Current and Projected**

- Community Trends
- Industry Trends
- Client Trends and Analysis – duplication of services, demand for services
- Donor Trends and Analysis – competition, emerging opportunities

# **Internal Analysis and Planning: Strengths and Weaknesses, Strategies and Activities**

- Management Practices: Administration and, as applicable: Purchasing, Operations, Facilities, Equipment, Maintenance
- Financial Management
- Human Resources Management – staff, volunteer

# **Internal Analysis and Planning: Strengths and Weaknesses, Strategies and Activities**

- Programming Design and Development
- Client Services Marketing Analysis: management, services/product, referrals and recruitment, eligibility, pricing
- Donor Marketing Analysis: management, services/product, pricing, promotions

# **Internal Analysis and Planning: Strengths and Weaknesses, Strategies and Activities**

- Quality Assurance, Evaluation
- Technology
- Information Management
- Risk Management

# Moving to Implementation, Updating the Plan

- Align other foundational documents with strategic plan (e.g. job descriptions and performance evaluation)
- Use goals, objectives, etc. as base for evaluation
- Assign “keeper” of the plan
- Review and update continuously

# **Don't forget to 'crunch' the numbers**

Your budget is  
a numerical representation  
of your values

# **Thank you for your participation!**

More information:

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