

Non-Profit Collaborative Strategic Planning for Non-Profit Organizations

Hosted By:

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Introduction

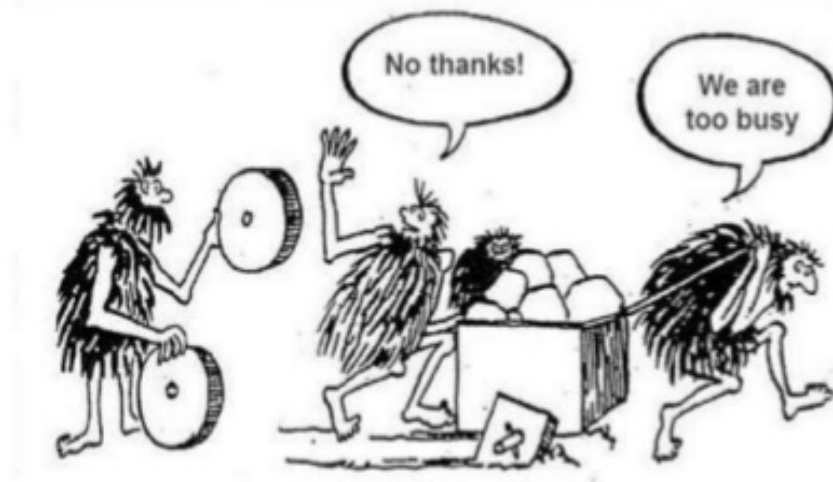
Today's Agenda

- **What is the Value of a Strategic Plan?**
- **Strategic Planning Life Cycle**
- **Mission and Vision Statements**
- **Building the Plan using; Primary Objectives, SMART Goals and Action Plans**
- **Execution of the Plan**
- **Evaluation of the Plan**



Strategic Planning Life Cycle

II. A Failure to Plan is a Plan to Fail



Myths About Planning

- **Most people are good at planning.**
- **Planning takes too much time and work; it bogs us down.**
- **Planning is looked upon as an investment.**
- **The best planning measures are based on complex strategies.**
- **Planning should be concrete, and not flexible.**



The Value of Planning



**YES IT'S GOING REALLY
WELL. WE ARE
PLANNING ON HAVING A
BABY TOGETHER.**

SHAH RUKH KHAN
PICTUREQUOTES.COM



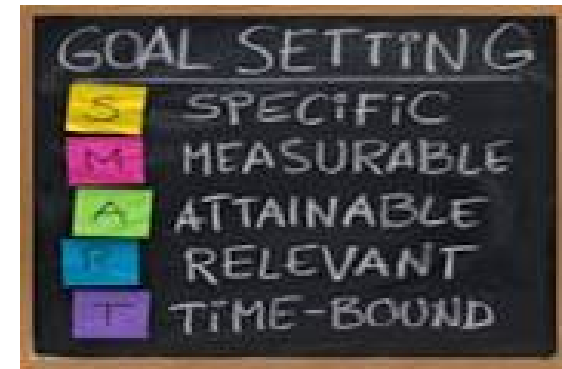
Strategic Planning Life Cycle

- Clarify
- Plan
- Execute
- Evaluate



Clarify

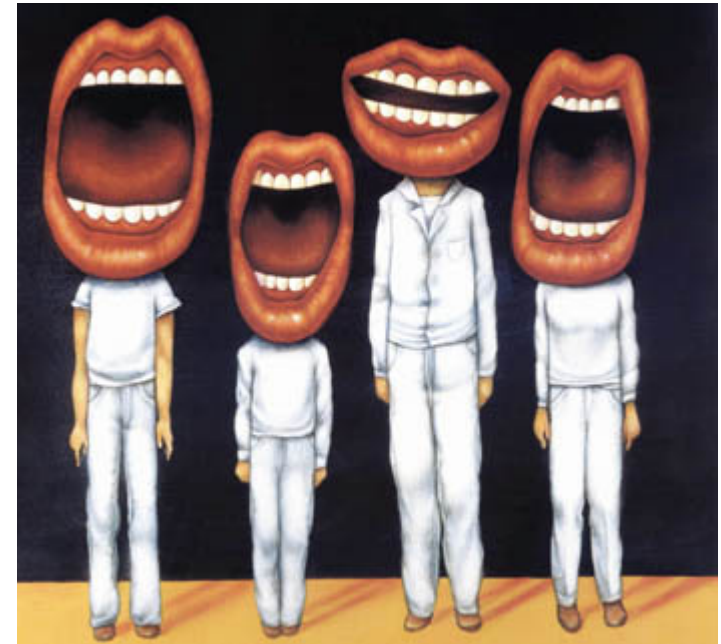
- ***Define what you want to achieve:***
 - Mission Statement
 - Vision Statement
 - Strategy vs. tasks
 - Short-term vs. long-term planning
 - Short-term action items
 - Long-term strategies and direction
 - Operational items
 - Impressing Funders
- **Strategic Planning vs. Review**



Clarify

Identifying topics to discuss:

Strategies	Facilities
Market area	Staffing
Growth opportunities	Programming
Mergers/consolidations	Public Relations
Board Succession	Marketing
Corporate Governance	Branding
Management Succession	Technology Solutions
ED Performance	Financial Results
Alternative funding	



**Whatever you want to talk
about.....**



Clarify

- **Setting your mind in the right place**
 - Intuition and creativity
 - Appreciating your competitive environment
 - Unraveling the complexities of the organization
 - Agility, flexibility and member savvy
 - Ongoing frame of mind



Clarify

- **Choose the right facilitator**
 - They should not be part of the discussion
 - Responsible for documenting progress
 - Keeping the sessions on track
 - Ensuring all topics are covered
 - Possess basic knowledge of the organization
 - Must be familiar with the strategic planning process



findafacilitator



Clarify

Where to find a good facilitator:

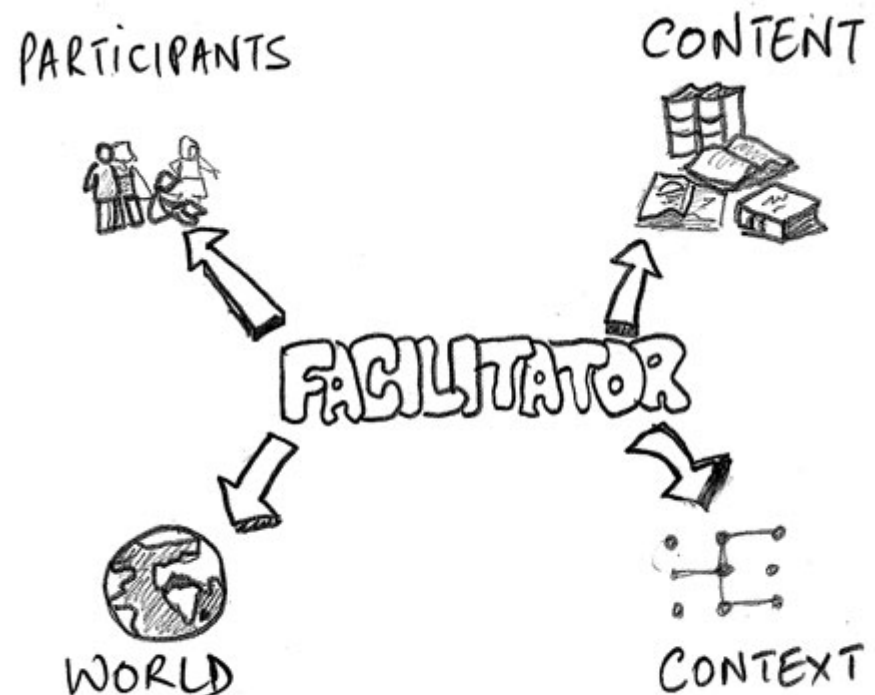
- Internally
 - Board of Directors
 - Executive Director
 - Advisory Board Member
 - Jericho Road
- Professional Facilitator
- Private Facilitating Companies
- Colleges and Universities



Clarify

How to find a good facilitator:

- Interview the Facilitator
- Funding may be available for this process



Clarify

Who to involve in strategic planning?

- Board of Directors
- Advisory Board
- Executive Director
- Founding Director
- Staff
- Members
- General Public



What are the Responsibilities of Each?



Clarify

- Other thoughts to consider:
 - Where will I hold the meetings?
 - Let's do a retreat
 - Home is where the heart is!



Clarify

- Other thoughts to consider:
 - How long will each session last?
 - Day long sessions
 - Multiple shorter sessions
 - Don't forget to take breaks and feed them



Clarify

**Don't forget
to take
breaks
and to
feed them!**



Clarify



Clarify

**Do We
Need A
Mission
Statement
???**



Clarify

A mission statement
defines the purpose of
the organization and
provides the reason
why it exists



Clarify

A vision statement
reflects the optimistic
view of the
organization's future,
rather than why the
organization exists



Clarify

Breakout Session: Mission Statement

- Introduce yourself and your organization
- Present your mission statement to the group
- Circle the key words in the mission statement
- Strike through unnecessary words
- Discuss why you made the changes with the group
- Do not worry about wordsmithing at this time

Note: The same exercise can be used for updating/creating a Vision Statement



Clarify

- Other external thoughts to consider:
 - What is the benefit of conducting market research?
 - Know your market, your members, your potential members
 - Know your competition



Clarify

Conducting a SWOT

- Brainstorming at different levels
 - Board
 - Staff
- Documenting the thoughts
- Narrowing down the ideas
- When do we do this?



Clarify

- **Strength:** Internal element which is under your control which can create a competitive advantage.
- **Weakness:** Internal element which is under your control which can be stopped to avoid objective derailment.
- **Opportunity:** External condition that is out of your control, but you can benefit from if you plan properly.
- **Threat:** External negative condition that is out of your control, but you can defend against it and reduce its impact.



Clarify

Breakout Session: S.W.O.T.

- Review the example company
- Brainstorming requires everyone's participation
- As a group, identify three Strengths, Weaknesses, Opportunities and Threats



Building the Plan



Building the Plan

- **Primary Objectives:** A broad statement of purpose describing the end stated towards which the goals and actions plans are directed.
- **SMART Goals:** Provide detail to primary objective direction and set targets so that the action plans can be developed.
- **Action Plan:** Provide a roadmap to implement the SMART goals.



Building the Plan

- Primary Objectives: A broad statement of purpose describing the end stated towards which the goals and actions plans are directed.
- Confirmation of the group's consensus
- Prioritize items from SWOT
- Identify 3-5 from each category to become your strategic priorities



Building the Plan

Primary Objectives:

- Which ones are we most likely to accomplish?
- Which ones will have the greatest impact?
- Can we achieve these in three years?
- What are the budget implications?
- Are there any barriers to complete?



Objectives



Building the Plan

Smart goals:

- Specific: Who is involved and what will we accomplish?
- Measurable: How much, how many and when will we finish?
- Attainable: Do we have the resources available?
- Relevant: How does it align with our strategy?
- Time-bound: Clear time-frame and deadline?



Building the Plan

Action Plans:

- Specific activities
- Responsibility levels
- Time frames
- Outcomes

ACTION PLAN



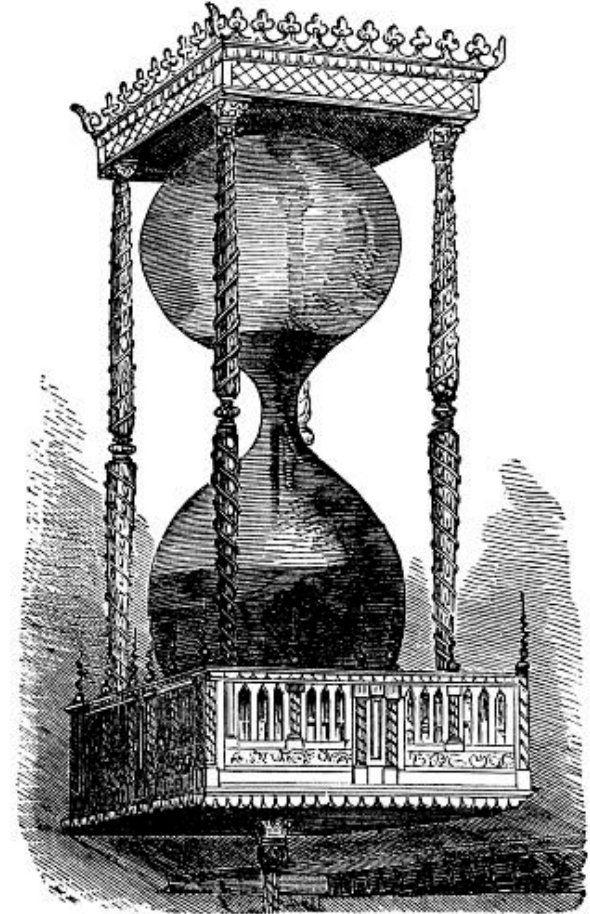
Execution and Evaluation

- **Determine when the plan will be completed**
- **Determine plan format**
- **Identify who will review and approve the plan**
- **Distribute the plan**



Execution and Evaluation

- **Who will own the action items: Board vs. Managers**
- **Determine the frequency of follow-up**
- **Assign the plan to a committee**



Execution and Evaluation

- **Be willing to adapt/change the plan**
- **Measure results**
- **Celebrate accomplishments**
- **Share with your community**



Execution and Evaluation

- What is the life of a strategic plan?
 - 1 year
 - 3 years
 - 5 years
- Do it all over again
- Consider performing a strategic review each year



**DO IT OVER
AND OVER
AGAIN UNTIL
IT BECOMES
PART OF WHO
YOU ARE.**



Summary

- **Set your goals**
- **Prepare for your session**
- **Properly administrate the session**
- **Follow-up and monitor the plan**



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