Non-Profit Collaborative

Strategic Planning for Non-Profit Organizations

Hosted By:
Michael Gallagher
Chief Risk Officer, EVP, Enterprise Bank
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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
II. A Failure to Plan is a Plan to Fail
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.
Strategic Planning Life Cycle

- Clarify
- Plan
- Execute
- Evaluate
• **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**
Indentifying topics to discuss:

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

Whatever you want to talk about........
• 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
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
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
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?
• Other thoughts to consider:

  – Where will I hold the meetings?
    • Let’s do a retreat
    • Home is where the heart is!
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
Don’t forget to take breaks and to feed them!
Clarify
Clarify

Do We Need A Mission Statement ???
A **mission statement** defines the purpose of the organization and provides the reason why it exists.
A vision statement reflects the optimistic view of the organization’s future, rather than why the organization exists.
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
• Other external thoughts to consider:
  – What is the benefit of conducting market research?
    • Know your market, your members, your potential members
    • Know your competition
Conducting a SWOT

- Brainstorming at different levels
  - Board
  - Staff
- Documenting the thoughts
- Narrowing down the ideas
- When do we do this?
**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 our of your control, but you can defend against it and reduce its impact.
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
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.
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
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?
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
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
• 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
Summary

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