Non-Profit Collaborative

Strategic Planning for Non-Profit Organizations

Hosted By Mike Gallagher

September 2017
Today’s Agenda

• Setting your goals
• Preparing for your session
• Administrating the session
• Follow-up and monitoring
• Summary
Setting Your Goals

• 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
• **Examples of Discussion Topics:**
  – Succession Planning
  – Programs or Products
  – Financial Position and Results
  – Status of the Economy or Industry
  – Expansion
  – Technology
  – Branding
Do We Need A Mission Statement

Mission Statement: a formal summary of the aims and values of a company, organization, or individual.
Vision Statement: a company's road map, indicating both what the company wants to become and guiding transformational initiatives by setting a defined direction for the company's growth.
Preparing For Your Session

• 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
Preparing For Your Session

Think Strategically and not Tactically
Preparing For Your Session

• 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
Preparing For Your Session

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
Preparing For Your Session

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:

- What is the benefit of conducting market research?
  - Know your market, your members, your potential members
  - Know your competition
Preparing For Your Session

• 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.
Administrating the Session
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..........
Exercise

Examples:

- Fundraising
- Branding and Image
- The Safety of our Team
- Building Relationships in the Community
Conducting a SWOT

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

Document your progress

– Minutes
– Action Plans
– Excel worksheets
– Too much or too little detail
• Consider using break-out groups
  – How do those work?
• Presentation vs Interaction
• Focus on what you want to achieve.
• Plan for another session, because you’re going to need one!

KEEP CALM
AND WORK OVERTIME
Follow-up and Monitoring

- Determine when the plan will be completed
- Determine plan format
- Identify who will review and approve the plan
- Distribute the plan
- Who will own the action items: Board vs. Managers
Follow-up and Monitoring

- Determine the frequency of follow-up
- Assign the plan to a committee
- Identify actionable steps
- Assign deadlines
Follow-up and Monitoring

• Be willing to adapt/change the plan
• Measure results
• Celebrate accomplishments
• Share with your community
Follow-up and Monitoring

- 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