

# Non-Profit Collaborative Strategic Planning for Non-Profit Organizations

**Hosted By Mike Gallagher  
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# Introduction

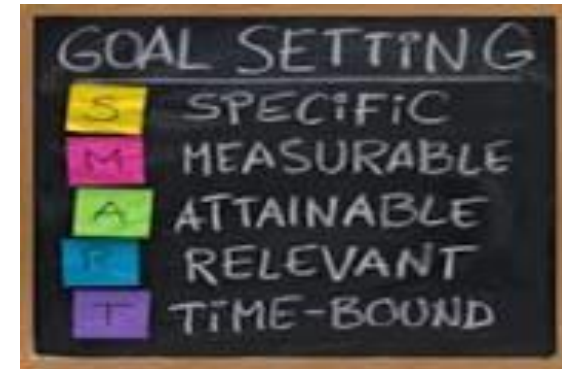
## Today's Agenda

- **Setting your goals**
- **Preparing for your session**
- **Administering 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**



# Setting Your Goals

- **Examples of Discussion Topics:**

- Succession Planning
- Programs or Products
- Financial Position and Results
- Status of the Economy or Industry
- Expansion
- Technology
- Branding



DISCUSS



# Setting Your Goals

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



Mission Statement: a formal summary of the aims and values of a company, organization, or individual.



# Setting Your Goals

**Do We  
Need A  
Vision  
Statement  
?????**



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



**findafacilitator**



# 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

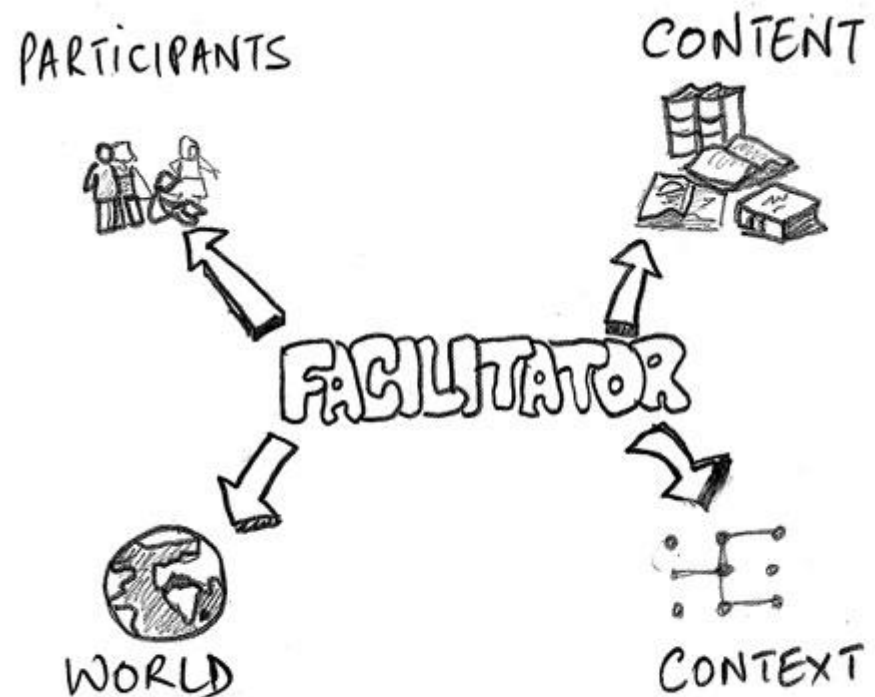


# Preparing For Your Session

## How to find a good facilitator:

**Interview the  
Facilitator**

**Funding may be  
available for this  
process**



# Preparing For Your Session

## 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?



# Preparing For Your Session

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



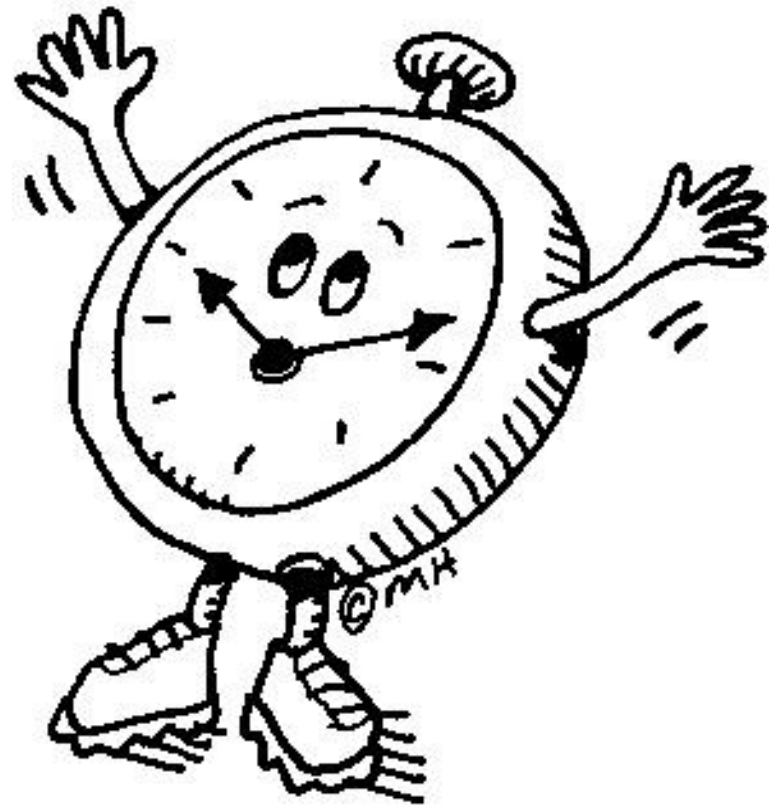
# Preparing For Your Session

- **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





# Preparing For Your Session

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





# Administering the Session



# Administering the Session

## 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.....**



# Administering the Session

## Exercise

### Examples:

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



# Administering the Session

## Conducting a SWOT

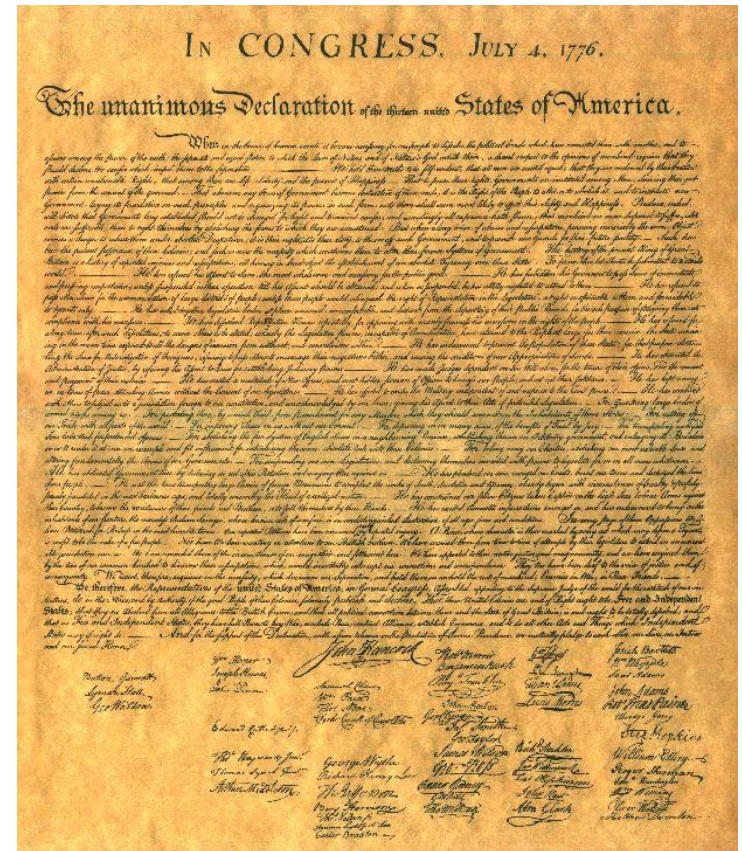
- Brainstorming at different levels
  - Board
  - Staff
- Documenting the thoughts
- Narrowing down the ideas
- When do we do this?



# Administering the Session

## Document your progress

- Minutes
- Action Plans
- Excel worksheets
- Too much or too little detail



# Administering the Session

- Consider using break-out groups
  - How do those work?
- Presentation vs Interaction
- Focus on what you want to achieve.



"Speak up, I can hardly hear ya!"



# Follow-up and Monitoring

- **Plan for another session, because you're going to need one!**





# Follow-up and Monitoring

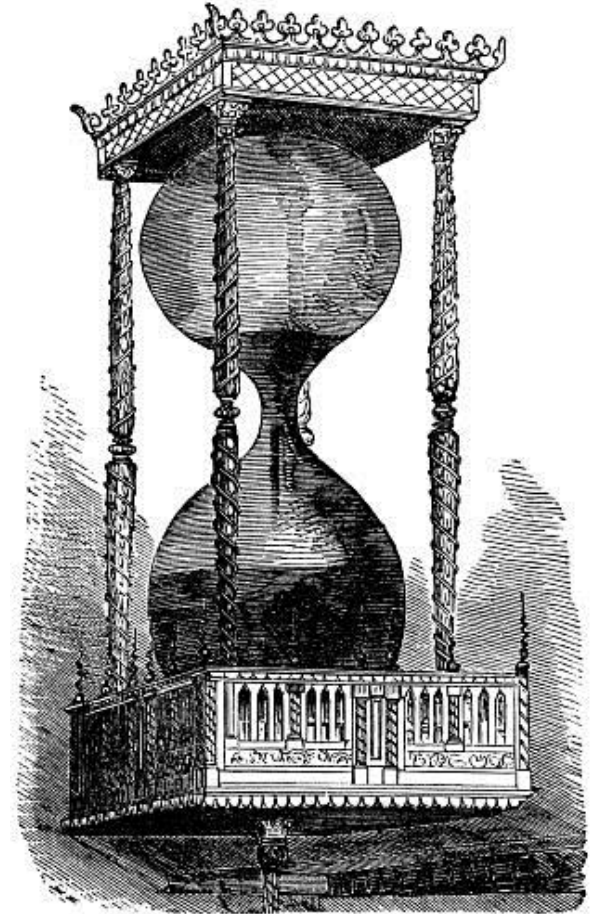
- **Determine when the plan will be completed**
- **Determine plan format**
- **Identify who will review and approve the plan**
- **Distribute the plan**
- **Who will own the action items: Board vs. Managers**





# 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**

