

BRADY WARE & COMPANY

TAKE FIVE

NONPROFIT LEADERSHIP CONFERENCE

Strategic Planning for Smaller Organizations

SPEAKER:
Bob Reynolds, CPA, CGMA

Strategic Planning for Smaller Organizations

Our Agenda

- What is Strategic Planning?
- Who Should Be Involved?
- The Planning Process
- Questions?

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Strategic Planning for Smaller Organizations

What is Strategic Planning?

A disciplined approach to produce decisions and actions that shape what an organization is, what it does, and why it does it.

Source: J.M. Bryson (1995) *Strategic Planning for Public and Nonprofit Organizations*


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What is the Desired Outcome?

A clearer understanding of ...

- Who we are
- What do we do
- Who do we do it for
- What challenges do we face

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Who Should Be Involved?

The Champion

- Key Board Member or Executive Director
 - keeps the process on-track

The Plan Author

- Assembles and translates the session notes into the Strategic Plan Document

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Who Should Be Involved?

The Board of Directors

- Setting strategy is a Board responsibility
 - Can involve the full Board or a Committee

The Staff

- Based on their understanding of operations and programming, key team members can contribute greatly to the process


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Who Should Be Involved?

Other Stakeholders

- Clients
- Professional Advisors
- Strategic Partners
- Prior Board Members
- Community Leaders (COIs)


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Who Should Be Involved?

The Facilitator


- Responsible for leading the planning meetings
- Responsible to keep the discussion on-track
- Often someone outside the organization
- Can be a board member or Executive Director

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The Strategic Planning Process


- Define Mission and Vision
- Identify Core Values and Beliefs
- Identify Stakeholders
- Environmental Assessment

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The Strategic Planning Process

- SWOT Analysis
- Identify Strategic Objectives
- Implementation / Monitoring

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Mission and Vision Statements

To be successful we must first understand ...

Who we are and
Why do we exist ...

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Vision Statement

A single sentence describing the clear and inspirational long-term impact resulting from an organization or program's work.

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Mission Statement

An organization's mission statement should clearly communicate what it is that they do.

Note - Many mission statements succumb to an over use of words, especially jargon.

Good mission statements are **clear, memorable, concise.**

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Vision Statements

Our vision is a world in which every child attains the right to survival, protection, development and participation

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Mission Statement

Creating lasting change for children in need in the United States and around the world


Save the Children

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CORE VALUES / BELIEFS


- The fundamental beliefs of the organization.
- The guiding principles that dictate behavior and action.
- Core values can help the organization
 - Define what is right from wrong
 - Determine if it is on the right path and fulfilling its goals

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STAKEHOLDERS

- Who do we serve?
- Who supports our mission and programs?
- Who benefits from the work we do?
- Who do we support or collaborate with?

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Environmental Assessment

Is our goal to be **Sustainable** or **Resilient**?


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Environmental Assessment

Sustainable
Able to be **maintained** at a certain level

Resilient
Able to **withstand or recover quickly** from difficult conditions


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Environmental Assessment

The PESTELC Assessment


- **P**olitical
- **E**nvironmental
- **S**ociocultural
- **T**echnology
- **E**conomic
- **L**egal
- **C**ompetition / **C**ollaboration

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SWOT Analysis

Strengths Characteristics of the organization that give it an advantage over others	Weaknesses Characteristics that place the organization at a disadvantage relative to others
Opportunities Elements in the environment that the organization could exploit to its advantage	Threats Elements in the environment that could cause trouble for the organization


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Identify Strategic Objectives

Near-term Objectives

- Highest priority
- To be accomplished in 12 – 15 months
- Project milestones must be realistic (timing)
- Progress milestones must be measurable (outcomes)
- Project success must be defined (*How do we know we're done?*)


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Identify Strategic Objectives

Long-term Objectives

- Important but not mission critical
- To be accomplished in 15 – 36 months
- Project milestones must be realistic (timing)
- Progress milestones must be measurable (outcomes)
- Project success must be defined (*How do we know we're done?*)

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Implementation / Monitoring

One very important consideration when implementing your strategic plan is:

"You can not manage what you do not measure"

Regular updates concerning the action steps you develop is the key to sustained progress on your strategic plan.

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Are there any Questions?

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If you would like to learn more about strategic planning for your organization contact:

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You must be the change you wish to see in the world
--Mahatma Gandhi

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