

What is a strategic plan & why does my nonprofit need one?

We've all heard the saying, "When you fail to plan, you plan to fail." Yet, many nonprofits overlook the importance of strategic planning to the success of their missions. With a strategic plan in place, nonprofits can have the greatest possible impact on their communities, maximize their fundraising dollars, and ensure they stay true to their missions.

The strategic planning process helps an organization:

- Clarify its mission and goals
- Make informed decisions about current realities
- Anticipate and respond to change
- Target its spending appropriately
- Reshape its programs, fundraising and other aspects of operations to be more effective

So how does a nonprofit go about creating a strategic plan?

Strategic plans are not created in a vacuum. Staff, board leadership, agency users, and volunteers should all be involved. This will ensure that all perspectives and voices are part of the review and planning process. Since everyone in your organization can't be part of the actual planning committee, careful thought should be taken to have a representative group that is clearly empowered to draft and present a final business plan to the board or other body for approval. All stakeholders should understand the process and how they fit into it to allow for corporate-wide buy-in and support. It's everyone's plan, and therefore everyone's responsibility to help achieve it.

Many organizations set aside a day, or more, for everyone to get together, review, analyze, and discuss. To ensure that decisions are made and the process moves forward, it's important to designate a leader for your strategic planning process. This person should set the agenda, keep discussions on track, and delegate different aspects of researching and writing the plan as needed.

The strategic planning process can be divided into the following areas.

1. Articulate the specific outcomes your organization is striving to achieve

While your mission statement tells people your organization's reason for existing, and often inspires your staff, volunteers and the community, it's a general statement. It doesn't provide concrete goals and outcomes. Over time, what exactly your organization wants to achieve may change, even though your mission statement may still be accurate. The strategic planning process is a good time to review what your intended impact on the community is and what specific change you'd like to create. We'll talk more about setting measurable goals in point number four below.

2. Clearly understand and articulate the current environment's challenges and opportunities

Understanding the current needs and priorities of your organization and how they fit into the local and national community is essential. What are current political or economic factors that may impact your services or products? Are there changes in leadership or volunteers that will influence a new direction in the organization's mission? What new needs are there that your organization could meet in the community? Take an inventory and compile an honest list of these challenges and opportunities so that your group has a clear view of the environment in which you're operating.

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3. Realistically assess strengths and limitations

A review of the organization's current projects, funding targets, budgets, and objectives will reveal areas of strength and success, as well as those of under performance or concern. Having an understanding of what the group does well and those areas that need improvement, or need to be changed completely, must be part of an effective planning process. Only with this understanding of the real potential of the organization can new and realistic plans be made going forward.

4. Set clear priorities and develop an implementation plan

The goal of strategic planning is to develop a roadmap that ensures everyone involved in the organization is headed in the same direction. A useful strategic plan has a clearly defined set of priorities and quantifiable goals for each phase of the plan—often between one and five years. To achieve these results, a detailed implementation plan will identify specific strategies or sets of activities. These may include things you're already doing or require revamping programs or starting completely new programs that are more in line with your newly defined goals.

The planning process will include understanding the resources—financial, human, and organizational—needed to pursue these priorities and map out a plan to secure them. Budgets will be set to achieve the goals and funding streams sought in support of them. Performance measures, quantitative and qualitative milestones, should be set and measured throughout the term of the plan.

Strategic planning can be a challenging, emotional, and time consuming process. But it's an important investment for your organization to make. Once your goals are identified and your team aligned on how to best achieve them, your organization will be better able to make an ongoing, significant impact. If you're not sure how to start the strategic planning process or are feeling overwhelmed by the task, you can reach out to third party organizations, like Resource Associates, to guide you through the process.



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