



ACCREDITATION GURU, INC.

Prepare for Greatness®

Strategic Planning – Prerequisite for Successful Mission Fulfillment



July 13, 2022

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Agenda

- Importance of strategic planning
- “Plan to Plan”
- Vital components of a strategic plan
- Why it is critical for planning to be a cross-organizational process
- How to keep board members and stakeholders engaged in planning process
- Supporting annual plans



Strategic Planning Process

- Decisions and actions that shape and guide what an agency is, does, and why it does it
- Broad-scale info gathering
- Explores alternatives and emphasizes the future
- Specific and measurable goals
- Supported by annual plans
 - Operational
 - Programs
 - Development



What Strategic Planning is NOT

- NOT written in stone
- NOT a departmental, program, or operational plan
- NOT something to be updated...often
 - *Annual plans are the shorter-term option*

Why Strategic Planning?

- Maintain focus on mission and mission fulfillment
- Concentrate on priorities / key strategies
- Systematic approach to future thinking
- Assess, reassess, adjust programs
- Develop framework within which to make difficult programmatic & financial decisions



Why Strategic Planning?

- Accountability and evaluation of organizational effectiveness
- Marketplace competition
- Provide guidance to staff
- Stay on track during leadership transitions
- Requirement for **accreditation**



Why Be Strategic?

- Identify agency's unique niche to success
- Build upon strengths
- Identify and mitigate weaknesses and areas of risk
- Look for growth opportunities
- Anticipate problems
- Communicate to funders and stakeholders there is a systematic approach for future



Starting Off on the Right Foot

- Focus on a roadmap to the future
- Is the agency ready for planning?
- Is the board of directors ready for planning?
- Understand it isn't a linear process; it's more similar to a flow chart
- *Where are we now?*
- **Exceptional boards** add significant value and are engaged ...**GOAL!**



Questions to Ask Board and Key Staff Prior to Planning...

- Is the organization clear about its primary purpose?
- Are new strategic approaches needed for implementing the mission?
- Can existing fundraising and programmatic strategies be implemented in more effective ways?
- Are revenue projections realistic?
- Are goals and outcomes clear?
- What changes enacted during the pandemic that will be carried forward in the future?

Questions: Where Are We Now?

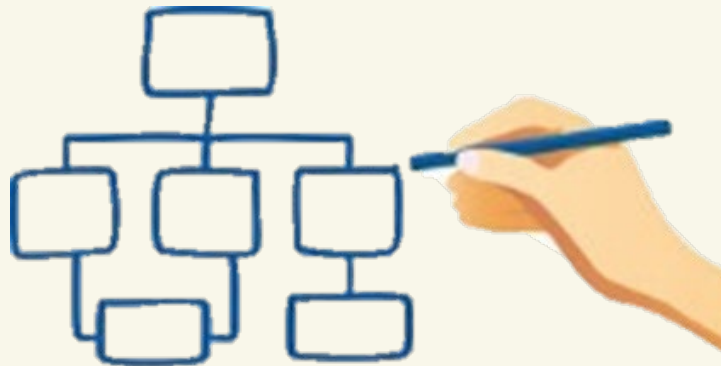
- Should any major programs be eliminated?
- Is there a need for *new* programs and services?
- Is it necessary to consider a totally new approach to our mission?
- Should we consider a merger or strategic partnership(s)?





Being Ready to Plan

- Initial questions to be answered... and more
- “Plan to Plan”
 - Key tasks and who performs them
 - Time frame for completion of planning process
 - Plan for implementing strategies
- Who to involve directly and indirectly
- How will decisions be made?



Time Needed?

- Is there time to plan?
 - 6 months typical vs. urgent planning
 - Discuss dates during “Plan to Plan” development
- Time period to cover?
- Time is needed for
 - Gathering data
 - Research and analysis
 - Attending meetings
 - Drafting and revising plan



When to Postpone Strategic Planning

- Time and financial resources needed will jeopardize financial stability of agency
- Leadership, board, staff not supporting the process
- Board turmoil
- Significant change in leadership
- Agency in crisis
- Lack of internal knowledge of how to go about planning process
 - Outside facilitator?

Previous Plan?

- If it exists, was it board approved?
- Is the current board aware? Satisfied?
- Relevancy of key strategies?
- Realistic goals? Viable?
- Accountability(!)
- Review last planning process – lessons learned



Components of a Strategic Plan

Tangible, written document containing:

- I. Executive summary
- II. Authorization (board approval)
- III. Mission and vision
- IV. Agency's profile and history
- V. Program descriptions
- VI. Organizational mandates
- VII. Critical issues and challenges



Components of a Strategic Plan

VIII. Environmental scan (trend analysis, demographics, politics, economies, etc.)

IX. Strategic **goals and objectives** with strategies for achievement

- Stem from organization's mission
- **Measurable and specific**
- Tie to quality measurements / performance improvement plan
- Support \$ development goals
- Supported by annual plans

Strategic Plan Appendices

- I. SWOT analysis
- II. Key departmental plans, may include:
 - Development
 - Information technology
 - Human Resources
 - Finance
- III. External assessments/data sources used
- IV. Organizational chart
- V. Board member list and profiles



Well organized ➡ Less stress ➡ Better outcome

Who Should Be Involved in the Planning Process?

- Full board of directors
- Executive Director
- Key staff members
- External stakeholders
- Consultant(?)
- **Steering committee**



Steering Committee's Role

- Who?
 - Mix of board members and staff
- What?
 - Guides planning process
 - Determines approach
 - Plans retreat
 - Writes surveys and analyzes data
 - Prepares final document

Board and Staff Connection

- Board / staff partnership
- Determine how to access needed info
- Share research and interview assignments
- Discuss issues that arise in planning
- Communicate differences of opinion and reasons why
- Understand each comes to the table with unique knowledge and expertise

Board of Directors' Role

- Commits to planning
- Ensures adequate resources
- Reviews and approves mission and vision
- Discusses critical issues and strategies
- Final approval of strategic plan
- Oversees accomplishment of goals

Executive Director's Role

- Obtains board's buy-in for planning
- May coordinate steering committee
- Participates in “plan to plan”
- Ensures strategies become operational
- Ensures participation of staff
- Encourages feedback and input
- Evaluates accomplishment of strategies, goals, and objectives

Development's Role

- Provide input to strategic planning process
- Provide relevant context to planning
- Research internal & external factors
- Program and activity prioritization
- Team buy-in and accountability
- Understand internal realities / capacity
- Report realistic progress against goals and of the process
- Organize data collection

Staff's Role

- Analyzes internal capacity
- Provide relevant context to planning
- Research internal & external factors
- Formulates and distributes surveys
- Organizes data collection
- Implements plan

Stakeholder Involvement

- Who?
- What?
 - Involvement with assessments
 - Outsiders' perceptions
- How?

Consultant – Yes or No?

- Project management and accountability for deadlines
- Facilitate discussion and decision making
- Outside of existing politics
- Expertise with strategic planning process
- Time limitations of staff



Location?
***To Retreat or Not to
Retreat?***



Function Strategically

- Maintain focus on the mission....*always!*
- Any gaps between what we claim we are and what actual performances/actions demonstrate?
- Roadmap to the future...keep eye on the horizon
- Where should we rank at the top?
- Lessons learned from other nonprofits? (↑ or ↓)
- Act differently if a for-profit organization?



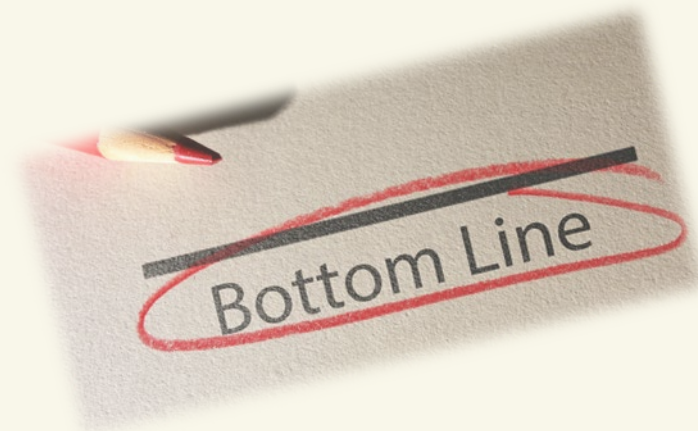
Consider Stability

- Funding
- Succession planning
- Board members
- Staff turnover
- Reactive vs. proactive actions & decisions
- Review demographic profile of defined service population



Where Are We Now?

- Limited desire to conduct SWOT analysis
- Lack of Stakeholder involvement
- Difficulty making tough decisions
 - Talking things to death... **ugh!**
- Final plan not properly implemented
- Deficient accountability



Development of Written Plan

- Draft and revise
- Board deliberation and vote to approve
- Where to disseminate?
- Next step – **written** annual/operational plan to support strategic goals

Annual / Operational Plan

- Strategies to be implemented in coming year
- Assign responsibilities to individuals
- Due dates and follow-up procedures
- Tie to quality improvement process
- Metrics and measurements
- Report implementation progress
- Reevaluate at the end of each year (at least) and create next annual plan



Next Steps?



More Questions...

- How diverse are our revenue streams and are they appropriate to our mission?
- Do we have the right mix of people involved in strategic planning?
- Which stakeholder groups will be included and how?
- What does the current board want its most important legacy to be in 5 – 10 years?
- Are we approaching the strategic planning process as a roadmap to the future?

Keep in Mind...

- Roadmap for the future
- Maintain focus on the mission
- Inclusive process for everyone involved
- Bring energy and a proactive mindset
- Requirement for national accreditation
- Stay on track throughout the year



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Questions?

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THANK YOU!