Strategic Planning – Prerequisite for Successful Mission Fulfillment

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Jennifer Flowers, Founder & CEO
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?
Jennifer Flowers, Founder & CEO
212.945.8504 c
Jennifer@AccreditationGuru.com

THANK YOU!