



Successful Strategic Planning – Finishing the Process

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Most nonprofits in Northern New England have an ongoing strategic planning process or are considering updating or developing a plan. Unfortunately, most of these efforts fall short of their potential. They bog down just as they are reaching the payoff stage.

Motivation for Strategic Planning can come from a desire to meet grant guidelines, a move to “best practices” or a desire to get stakeholders focused on achieving the mission. New Hampshire Charitable Foundation is emphasizing a “thoughtful, practical strategic plan” in its criteria for the newly introduced Community Impact Grants. This and other steps encouraging “best practices in capacity building”, will lead to greater emphasis on strategic planning. We are encouraging our clients to do their strategic planning, but also to take the time and devote the resources to do it right and to finish the process.

The strategic planning process classically involves the following steps:

- Review of Mission and Vision
- Analysis of Strengths, Weaknesses, Opportunities and Threats
- Development of Strategic Options
- Analysis of Strategic Options and Agreement on Priorities
- Write the Action Plan
- Develop Financial Projections (business plan) to support the Strategic Plan

Most nonprofits have a hotly debated “Mission Statement” along with a “Vision Statement”. Some have a “Statement of Values” which is useful, particularly for larger nonprofits. More often than not, there is a SWOT analysis – Internal Strength and Weaknesses and External Opportunities and Threats. It is at this point that the process bogs down.

Discussion of Strategic Options is not a smooth, linear process. More often than not this is addressed briefly by a weary board at the end of a long planning session. The results provide only a rough guide for the staff for the coming year. They are reviewed and perhaps updated at the end of a similarly exhausting session the following year.

For every hour spent debating mission and vision, several hours should be devoted to Strategic Options. This often leads to more research on competing priorities. Seasoned planners see this as an iterative process where options are explored and combinations of initiatives are tested until the best strategic “fit” is found.

The Action Plan can be written by staff or a planning task force. The Plan includes time lines and responsible individuals/committees.

It is essential to develop Financial Projections to support the plan. Resource constraints surface in the Action Plan and Financial Projections, resulting in yet iteration. It is not unusual to revisit and refine the Mission and Vision as the Action Plan and Projections are being completed.



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Whew - this is a lot of work; and, for most nonprofits, it can only be accomplished by judicious use of a board/stakeholder/task force(s). The results are worth it. Not only do you get consensus, focus, and something for funders - but you get a plan that will work.

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