



ESC STRATEGIC PLANNING CONSULTING

www.nonprofit-consultants.org

ESC works with nonprofit organizations to improve their effectiveness by providing affordable management consulting solutions delivered by experienced executives and professionals who donate their time and expertise.

WHAT CHARACTERIZES THE ESC STRATEGIC PLANNING PROCESS?

First, our planning consultants not only have experience making plans, but they have also been responsible for executing many of them in good times and bad. They help you make realistic plans that take into account your resources.

We usually work in teams of two so you get the benefit of the best thinking of two of our consultants.

We emphasize analyzing strategic options. Making the right choices around strategic options is what drives the plan, so it is critical to get this right.

We help you drill down to a realistic action plan, with time lines and responsibilities.

We work with you on a financial projection (business plan) to make sure the plan is financially sound.

A MAJOR OBSTACLE TO PLANNING IN MY ORGANIZATION IS THE TIME AVAILABLE FROM DIRECTORS. DO YOU HAVE ANY SUGGESTIONS?

We do several things. We often work with a small task force of key board, staff and stakeholders, so we do not require the time of the full board. We compile a fact sheet or write up of basic data, so we do not spend planning meetings on researching basic data once the process is stated. We stress homework between the meetings. Staff and/or consultants do the analysis between the meetings so the meetings can be shorter and more productive.

We have developed a streamlined planning process which works for smaller nonprofits. We believe 80% of nonprofits could benefit from this process.

WHAT EXACTLY ARE YOUR STRATEGIC PLANNING SERVICES?

We provide **Retreat Services**. This is the most effective way to update a plan in mid-course. It can be used to kick-off the process for a nonprofit just starting its first plan, or as a way to address a limited number of strategic choices for a more mature nonprofit. Our retreat services usually consist of an assessment visit, one or two planning meetings, the retreat, and often a follow-up meeting.



We provide **Strategic Planning for Small Nonprofits**, an accelerated process which works well with smaller nonprofits, or those in a less complex environment. This process includes an Environmental Scan and emphasizes leveraging Core Competencies. Once the process is underway it takes 6 meetings of 2 hours each over 3 months.

We offer a full **Strategic Planning Process**. This is the gold standard modeled on our experience with strategic planning in a corporate setting. It is more appropriate for larger nonprofits, those with complex competitive issues, and those with a diverse set of programs. It may involve mini-plans for the programs.

WHY DOES ESC HAVE MORE THAN ONE STRATEGIC PLANNING PRODUCT?

The simple answer is that no two nonprofits are exactly alike. Nonprofits differ in stage of development, sophistication in planning, competitive environment, and the time and resources available for planning.

HOW OFTEN SHOULD WE PLAN?

The answer to that is two-fold. When you near the achievement of plan objectives or the end of a time frame for an existing plan, it is time for a new plan. More often than not the driver is a change in the environment, be it funding, new competition, or an opportunity to expand needed services. If the environment changes, it is time for a new plan.

One characteristic of a good plan is that it is an operating document, not a dust collector. As such, even in a stable environment, an annual review and update is a good idea. If that is not possible, a review halfway through or at the two year mark is worthwhile.

WHEN SHOULD WE NOT PLAN?

Strategic Planning is not the solution when a nonprofit is in a financial crisis. This is the role of our Sustainability and Turnaround Consulting Services.

Strategic Planning not a good idea when new leadership comes on board. Six to twelve months after bringing on new leadership is a good time to begin Strategic Planning.

WHAT SERVICES DOES ESC OFFER TO HELP IMPLEMENT THE PLAN?

We can provide Mentoring on Implementation. Often the plan will call for strengthening the board, making the nonprofit more visible to the community, expanding existing programs, or developing new programs. ESC offers Board Governance, Marketing and Communications, and Growth Strategies consulting services to address these initiatives.