



Strategic Planning – Blue Sky, Tactical Lists, or Dust Collector

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The best assurance of survival that any enterprise can have is a sound strategic plan. In our work as management consultants Executive Service Corps reviews many strategic plans. What we find is that an increasing number of nonprofits have “strategic plans” but few of them rise to the level of “a thoughtful, practical strategic plan”.

Common defects are

- A tactical list, rather than a strategic plan
- All blue sky – too vague
- Unrealistic objectives
- The wrong time frame
- Failure to consider the environment
- Not devoting enough time to the process

The real test is whether a plan sits on the shelf gathering dust or is a critical operating document.

The remedy is to get the right planning team, to address the right issues in the right time frames, and to take the time to do the work.

The right strategic planning team should include key staff, board members, and possibly outside stakeholders. For a small nonprofit the team can be 5 to 7. For a larger nonprofit, with complex issues, it might typically be 12 to 15.

With too much staff input, the plan can end up as a tactical list. If “revising the personnel manual” is an important goal as opposed to “improving service quality by increasing employee retention”, this is a tactical list - not a strategic plan.

Three or four strategic initiatives are all that a smaller nonprofit can tackle, while a larger nonprofit might group its initiatives under 4 or 5 broad areas.

Without solid staff input, the plan can be too vague, or does not consider practical aspects of implementation. Are the human resources there to do the work? Can we pay for them?

Unless you are in a long lead time sector, such as housing, the time frame should be 3 years. A one year plan is an operating or business plan, and while a useful document, it is not a strategic plan. More than 3 years is beyond the ability to accurately predict the environment for most mission areas. The focus should be “what do we need to do in the next 18 to 24 months to be where we want to be in 3 years?”



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The planners need to consider all of the classic issues – are the mission and vision right? What are our strengths? What do our patrons and clients think of us? Where are we positioned strategically and what are our options? What are the risks to our agency? Asking directors to put dots on a chart at a facilitated retreat is a useful precursor to a strategic plan, but it is not a substitute for one.

Finally the most important step - take the time to address the issues. One client asked the Executive Service Corps to facilitate a strategic plan in an intense process that began on Friday night and ended late Sunday. While the results were impressive and our client was pleased, this is not the preferred way to do strategic planning. The process needs to be deliberative, but it needs momentum. We recommend a series of 6 to 10 meetings over a period of 3 months. Homework is required. The amount depends on the knowledge the agency has about its position in the competitive environment.

Do it right and you get a terrific return on the investment, not another document gathering dust.

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