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Strategic Planning: More Than a Wishlist

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Strategic Planning is a process where organizations define their goals for the future and create a plan that helps them execute that vision into reality. A good strategic plan helps you know where you are going, how you will get there, and the steps in between, including milestones and timelines. In other words, it becomes your strategy. But too often organizations end up developing more of a wish list where they throw everything at the wall to see what will stick. A better approach is to begin with strategic thinking and through the process of a bit of research begin with one to three major goals, then build out the strategy.



The roadmap you create will include:

- Determining if your organization is ready to begin planning.
- Accepting that stakeholders will include board, staff, partners, consultants, and target audiences.
- Understanding critical questions to ask yourself.
- Creating a plan that is sustainable and contributes to your succession plans, DEI goals, impact measurement, board development, and program planning.

There are many ways to begin a strategic plan, but its' equally important how you end. The plan should inform all of your functions and be referred to frequently. It should even be measured to determine if tasks or action items are being accomplished along the way so you can visually see your progress. The plan should be updated annually to ensure you add or remove objectives that are completed or no longer relevant, thereby becoming a living document.

All strategic plans should include the 5 basic steps below:

- Internal and external analysis: This scan will assess your strengths, weaknesses, opportunities, and threats (SWOT) and include external factors that can impact your organization.
- Vision: determining what your organization should strive to accomplish in the pursuit of your mission and ensure the priorities are achievable.
- Goals and objectives: Use all of your stakeholders to define your goals and outcomes but be reasonable in what your organization has the capacity to do.
- Create measures of success and timelines: You will need to identify the metrics you will use to know if you are successful and create actionable timelines based that are also based on your capacity.
- Implement the plan: Capture your SWOT, vision, goals, objectives, metrics and timeline in an easy to read chart or document. Refer to it frequently.

Sometimes organizations need an expert facilitator. Lewis Flax, of Flax Associates, helps nonprofit organizations assess their situation and says "Creating your strategic direction is critical to figuring out which road to follow, making sure that funding and other needs are addressed, and ensuring that your organization is responsive to community needs." With a plan and the right technical assistance, you will be on your way to transforming your organization, ensuring it is a key benefit to the community and designs the right actions to address the needs of your target audience.

