

Keys to Strategic Planning

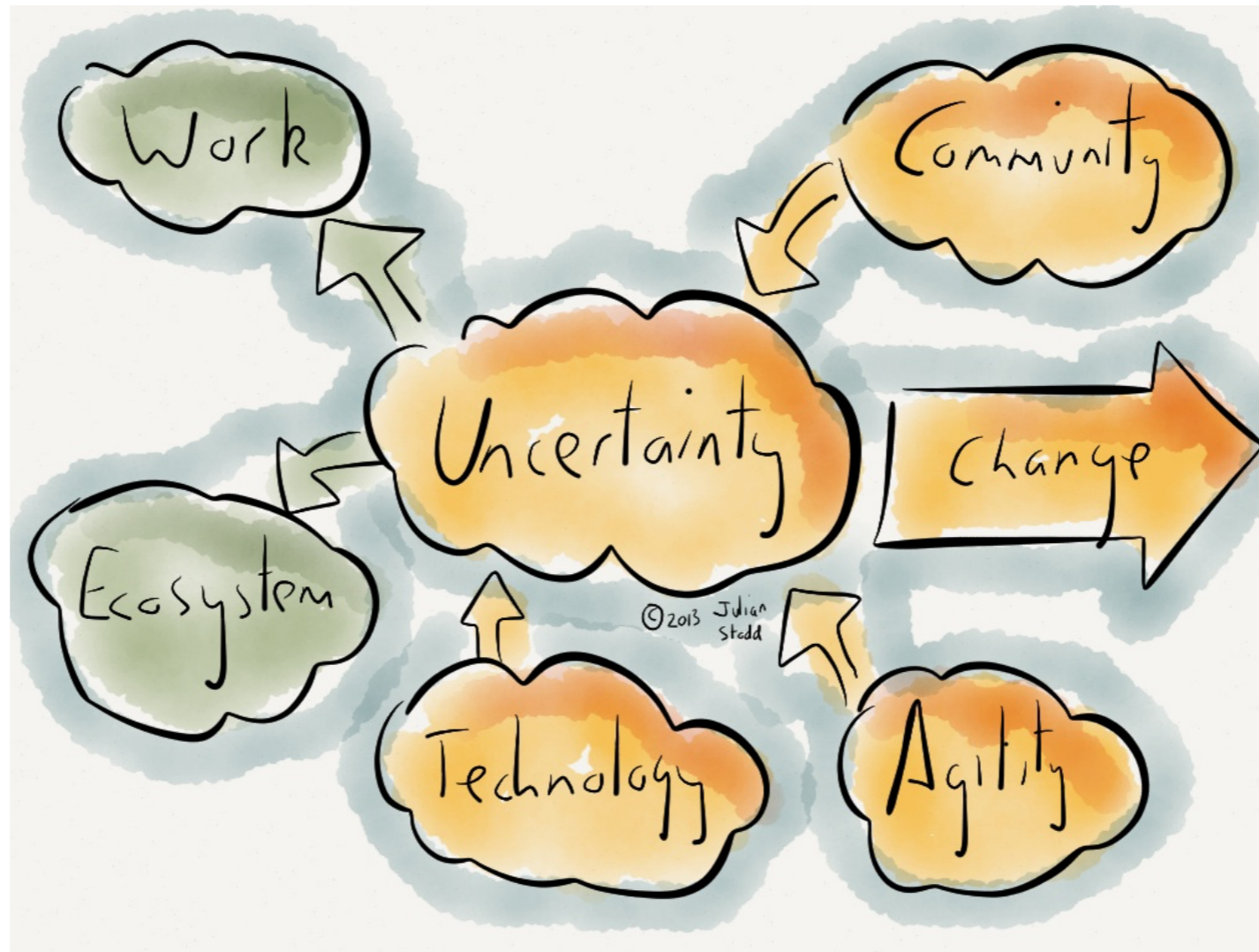
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Your experience with strategic planning?

1. How many strategic plans have you been involved in developing?
2. If you are a nonprofit staff or board member, does your organization currently have a strategic plan?

Acknowledging the obvious ...



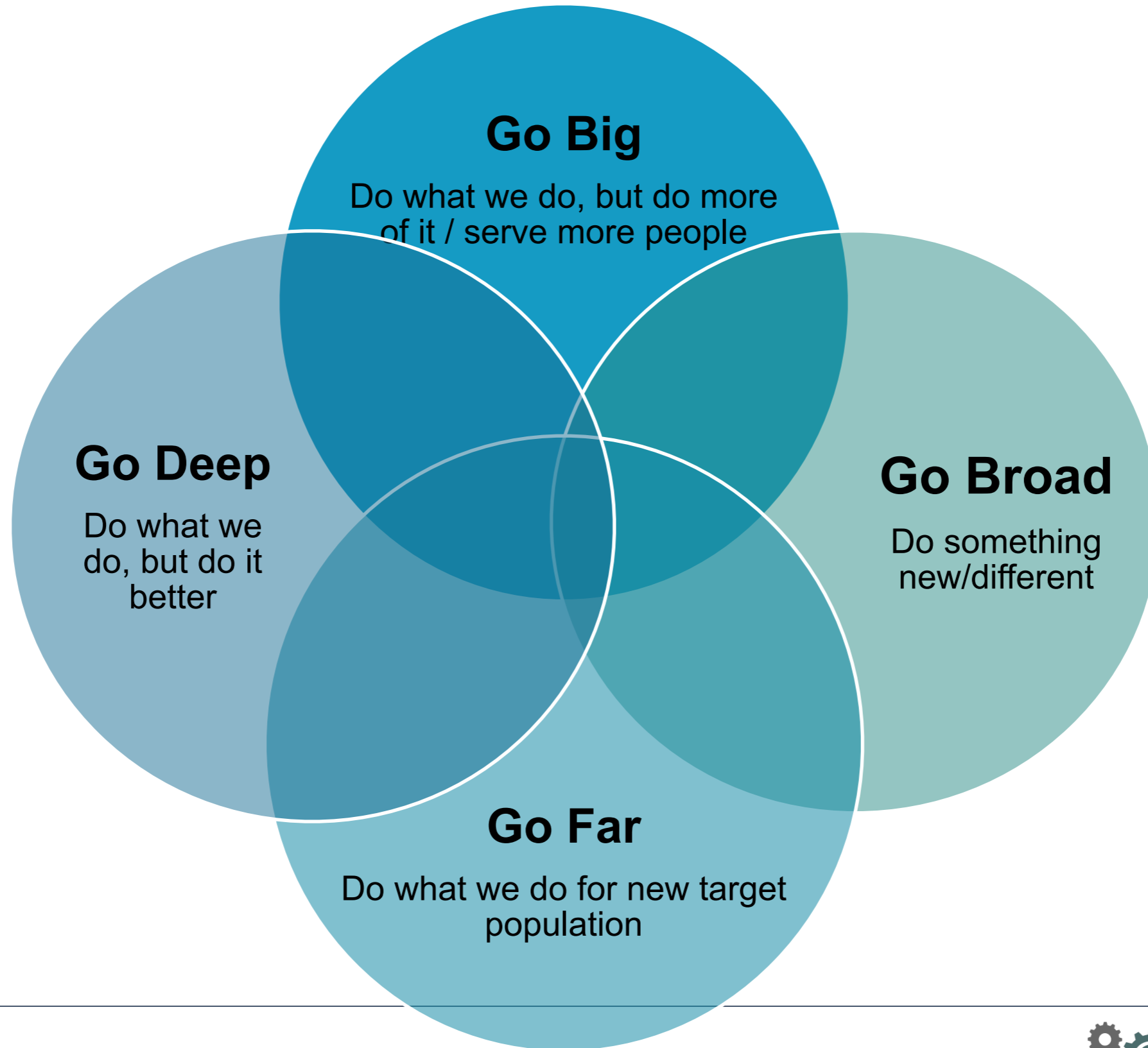
"There is nothing more certain and unchanging than uncertainty and change."

John F. Kennedy

How do we respond?



How might we change / adapt?



The Core ("ABCs") of Strategic Planning



WHEN should we embark on strategic planning?

A few signs the moment might be right:

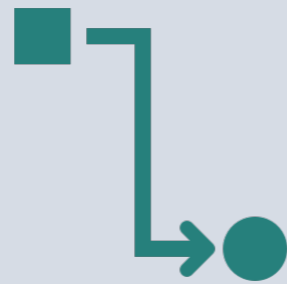
- ✓ Completed strategic plan – or it's not applicable any longer or has simply expired
- ✓ New leadership (Executive Director and/or many new Board members)
- ✓ Mission or vision are shifting
- ✓ External environment creating big changes for your cause
- ✓ Organization has significantly grown or shrunk
- ✓ Organization lacks clear direction
- ✓ No immediate crisis consuming the time/energy of Board and Executive Director



Fundamentals of strategic planning

As a starting point, helpful to think about what **good** strategic planning is and has always been, the 6 P's:

Process



Participation



Perspective



Probing



Priorities



Performance



6 Ps more important now than ever ...

Process

Participation

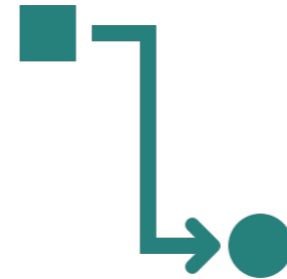
Perspective

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Performance

Process



- Defined process helps keep planning moving
- Transparency and clarity are important for trust
- Helps instill confidence about completion of plan

6 Ps more important now than ever ...

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Participation



- Crucial for staff and board unity and ownership
- Builds engagement, capacity, leadership
- Speaks directly to retention challenges
- Connects to equity and inclusion
- Helps understand and engage community

6 Ps more important now than ever ...

Process

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Perspective



- Opportunity to take a step back, take stock of big picture
- Reexamine and reground in org vision, mission, values
- Planning is future oriented – set desired future first, then the map to that destination

6 Ps more important now than ever ...

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- Crucial to get firm grounding in / assessment of current situation
- Be honest about org strengths and weaknesses, how they create or limit options
- Understand environment and its impact on org's approach and model

6 Ps more important now than ever ...

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Priorities



- Both needs and possible responses can feel overwhelming
- Utilize the process and discussions to clarify the most pressing strategic issues and what to focus on (and allocate resources to)

6 Ps more important now than ever ...

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- A set of goals is NOT a plan
- Establish clear implementation plan and metrics to facilitate ongoing monitoring and adaptation

Don't shy away from tough questions

- Does our mission still make sense?
- Do we have a clear long-term vision?
- Are we working according to our expressed values?
- Are our mission, vision, and values all working together?
- Are our programs still aligned with our mission, vision, and values?
- Do our programs serve the community's needs?
- Do our programs work to generate the results we hope for?

What's on the table in this plan?

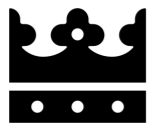
- Are we open to changing our **program model**?
- Are we open to (do we need to) change our **revenue model**?
- Are we open to a restructuring – **merger or other type of sustained collaboration**?



Special considerations for planning in 2023



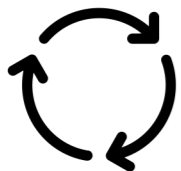
- **Organizational culture** important to address – especially related to meaningful diversity, equity, inclusion efforts



- **Leadership transition** and succession planning are crucial for sustainability



- Strategic planning is opportunity for **board re-engagement and recommitment**

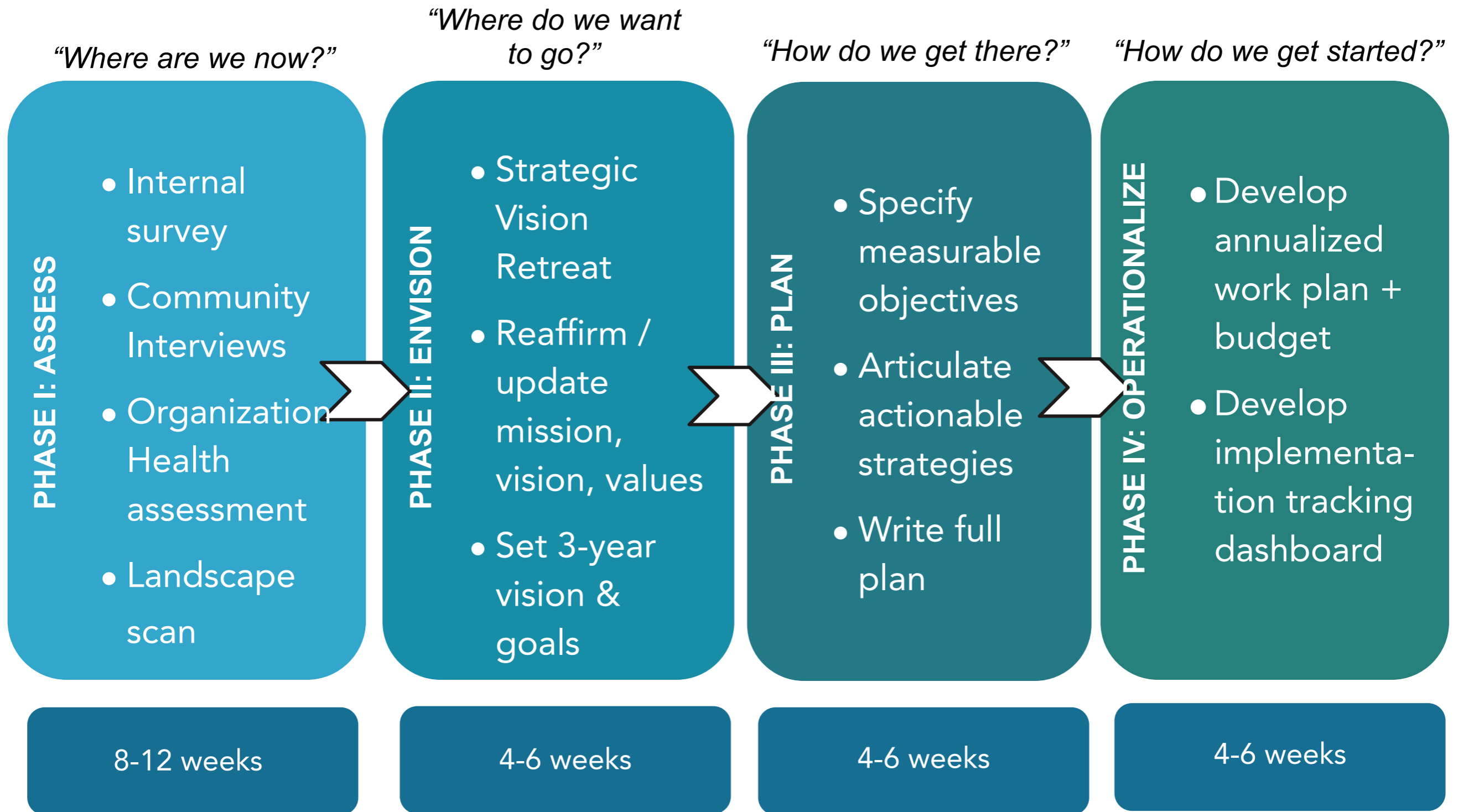


- Use **organizational lifecycle analysis** to inform planning process and strategic options



- Employ **scenario planning in financial analysis** that guides what's possible in terms of revenue expectations

Envision's Strategic Planning Process



Envision's Strategic Planning Services

	STRATEGY FRAMEWORK	STRATEGY ROADMAP	COMPREHENSIVE STRATEGIC PLAN
	Envision conducts situation assessment research, plans and leads planning retreat, provides summary report, recommendations, working draft of vision and goals	Building on Framework, Envision partners with leadership/task force to develop actionable roadmap of vision, goals, objectives, and strategies.	Building on Framework and Roadmap, Envision provides templates for and supports staff in full build-out of implementation plan including annual milestones, metrics, and budget.
Phase I: Assess "Where are we now?"	✓	✓	✓
Phase II: Envision "Where do we want to go?"	✓	✓	✓
Phase III: Plan "How do we get there?"		✓	✓
Phase IV: Operationalize "How do we implement?"			✓

For more information



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