



Washington County  
Community Foundation

*Helping You Give . . . Close to Home*

# Strategic Planning

For (sm)all nonprofits



# Wendy Burtner

- 30 years Nonprofit Leadership
- 15 years Nonprofit Board experience
- Consultant, Coach, and Trainer
- Founder of Nonprofit SideKick!
- Nuts & Bolts

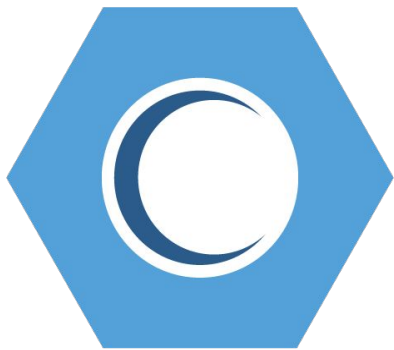


# Stephanie Masters

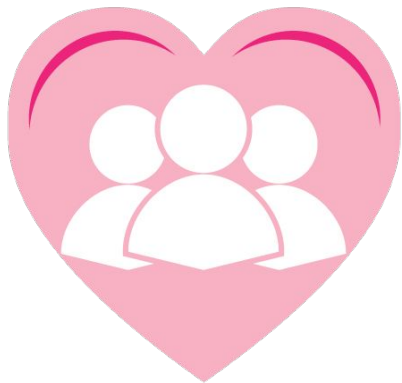
- Certified CliftonStrengths Coach
- Organizational Development Specialist
- SHRM SCP
- Founder of Nonprofit SideKick!
- Heart & Soul

# Why Strategic Planning?





Nuts and Bolts



Heart and Soul



**“The primary benefit of  
strategic planning is the  
process. Not the plan itself.”**

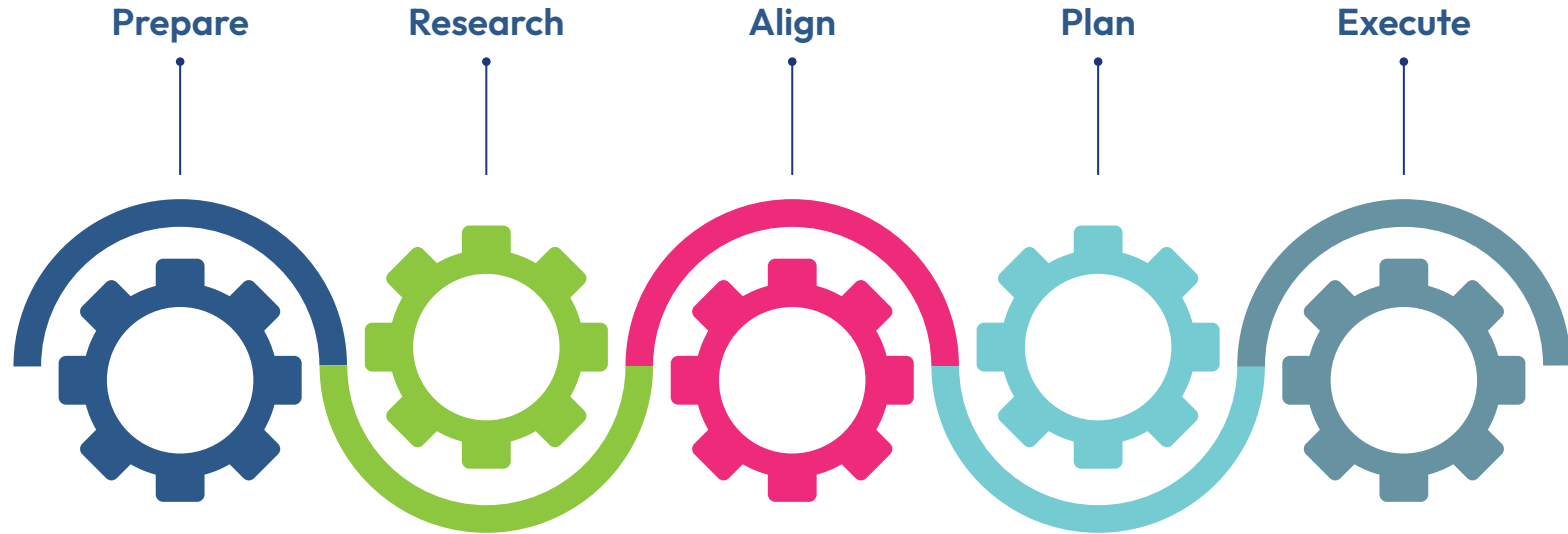
**GEORGE STEINER**



# Culture of Strategy

Running a nonprofit is a team sport. You need to get everyone on the same page, looking towards the future and in agreement on the steps to get there.

# The Strategic Planning Process







# Prepare

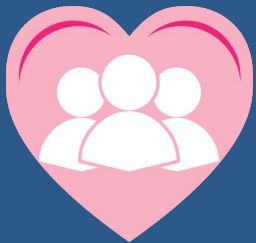


## “Plan to Plan”

- Right size the process to your organization
- Create a timeline
- Build a planning team
- Make sure the team knows the process
- Set expectation with board, staff, volunteers, and consultants



# Prepare



- When building the team: What leaders should be a part of this process?
  - Think about developmental opportunities for team members
- Who are the champions for change?
  - They can help create positive messaging and energy about the plan.
- What experience does your staff and board have with strategic planning?
  - If new, spend more time talking about the why and what of strategic planning
  - Discuss roles and responsibilities for each team member.



# Research



## “Environmental Scan”

- Market Analysis – look at comparable organizations and the market as a whole
- Stakeholder Input – Survey and/or interview constituents and stakeholders
- Impact Data – Review internal and external data for your organization
- Financial Data – Take an **honest** look at financials
- **Communicate** findings to team

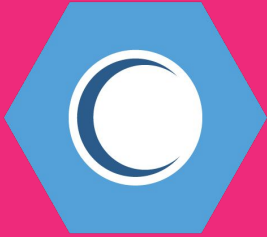


# Research



- **SWOT:** Strengths, Weaknesses, Opportunities and Threats
  - Learn what key stakeholders think
  - Another way to connect
  - Encourage participation
  - Build trust and engagement when you ask for insights at all levels of the organization
  - Can help identify blind spots
  - Lead to innovation and creative solutions
- **Market Analysis**
  - What do we need to know about the sector?
  - Where do we go to get accurate information?
  - Who else is doing similar work, what are they focusing on? How are they doing?

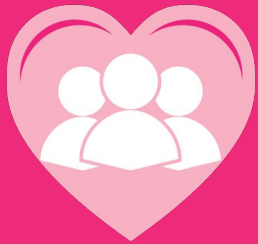
# Align



## Envision

- Focus on “who you are” and “where you want to go”
- Vision statement (results)
- Mission statement (purpose)
- Impact statement (changes)
- Values that underlie and support your work
- Get approval from entire board before moving forward with the rest of the plan
- Be prepared to take time... lots of time

# Align: Culture



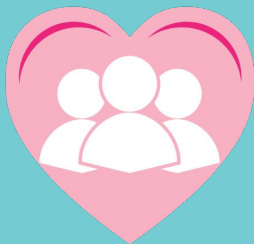
- Assess, does your mission, vision and values continue to your impact?
- Your mission statement should be the guiding statement of your strategic plan
- Your vision shares what the strategic plan will accomplish
- Organizational values are the BEHAVIORS we demonstrate to achieve our mission.
- Review your environmental scan for validation of your efforts and shine a light on your next steps and priorities
- Culture isn't shifted overnight, recognize the time and effort to get there

# Plan



- Priority areas
- Goals: 3-5 key goals in each area
- Actionable strategies
- Implementation Plan: internal guidance
  - How to measure success
  - Timeline
  - Lead responsibility
- Financial Plan: what impact will each of your priorities have on your budget?

# Plan



- Leadership is critical
  - Collaborate with your team and board to align roles and responsibilities
- Identify and define your big hairy audacious goals
  - Who is responsible and accountable for the behaviors and actions?
  - Who will be your cheerleaders?
- How do your goals sync to your budget?
  - Always assume it will take more time, money and effort
  - Be transparent with staff (leadership)






# Execute



- Align your resources: Just Do it.
- Operationalize your plan and align your budget
  - Bake it into your dashboard, staff meetings, job descriptions, reviews, program evaluation
  - Message - Marketing
- Engage inner circle – get them excited about it
  - Stakeholders: we heard you
  - Funders, donors: we have our act together
- Share information broadly: Marketing campaign that conveys the message “join us if you share our values”



# Execution is about Leadership



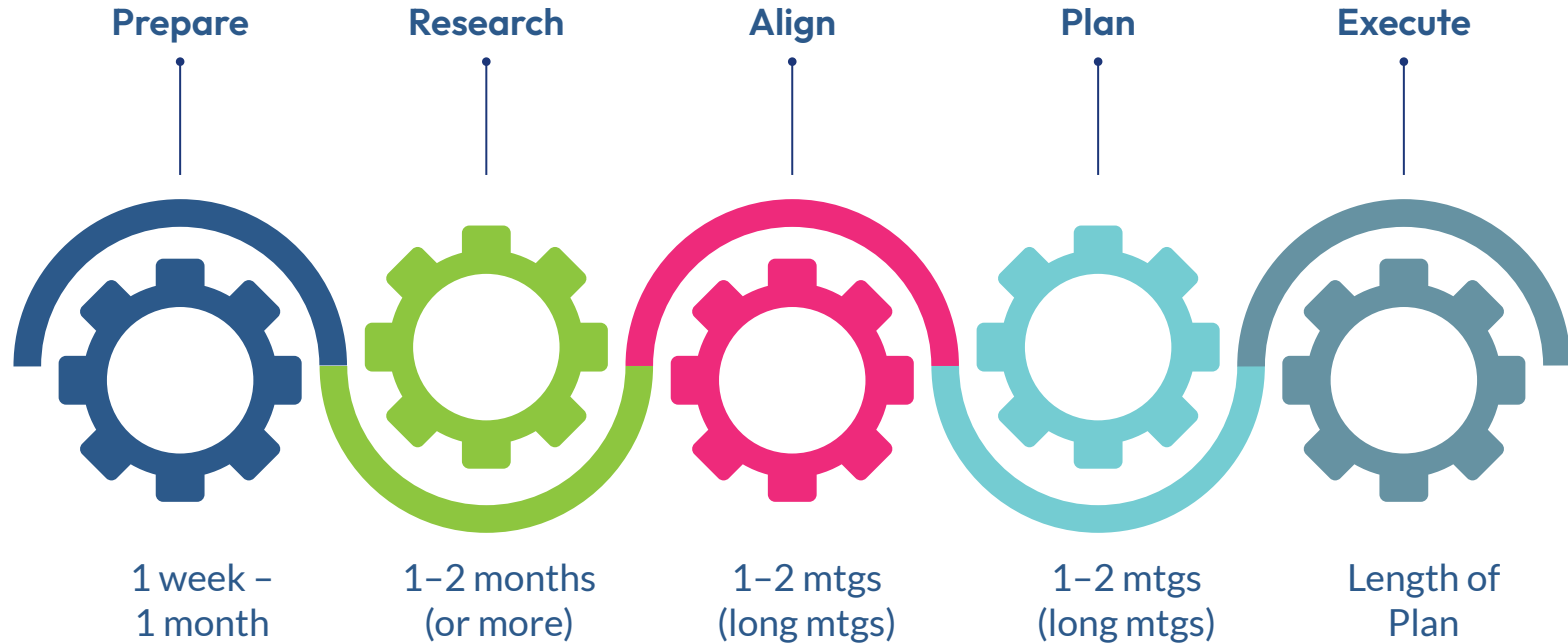
- Leadership sets the tone and pace of implementation
  - Know your strengths and where you need support
  - How do you coach others?
  - Celebrate the effort, milestones and goals
  - Over communicate and check in often
  - Build the strategic planning goals into coaching, personal development and performance goals
- Pause and Reflect Often
  - Work with staff and board to evaluate along the way
  - Ask for feedback
  - Measure outcomes
  - Adjust as necessary, share challenges and how the organization will recalibrate



# What's next?

1. Marketing/Comms Plan
2. Development Plan
3. Succession Planning
4. Scenario Planning
5. Budget
6. What else?

# How long will this take?



Communicate

Communicate

Communicate

Communicate



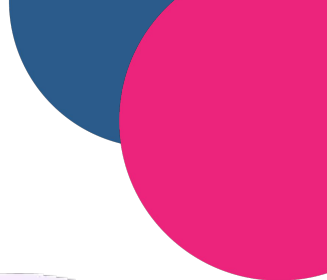


**Resist the urge to plan too soon!**



✓ Simple & Meaningful

✓ Inspirational & Marketable



“ Think of purpose, strategy, and culture as a triangle: Each angle connects with and shapes the other two, and if one changes, the other two must evolve and adjust to maintain balance and shape, or the triangle breaks and falls apart.

~Hubert Joly, Harvard Business Review, July 10, 2022

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Questions?



Our Community  
is Growing!  
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FREE  
to join!**

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Empowering Changemakers.  
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- Leadership Coaching
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- Strategy Consulting
- Board Development
- Online Community

