

How to Develop a Strategic Plan that Makes your Mission Possible



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Today's Agenda -



- ❖ Understanding strategic plans
- ❖ Developing “our” strategic plan
- ❖ Tips for developing and implementing a plan that works
- ❖ Nonprofit Resources

Understanding Strategic Plans

The keyword here is “Plan”



6 Bad Reasons for Not Having a Strategic Plan for Your Nonprofit



- ❖ Reason #1: We're Too Big (or Too Small) for Strategic Planning
- ❖ Reason #2: We Don't Know Where to Start
- ❖ Reason #3: But We've Already Done It!
- ❖ Reason #4: I'm the Executive Director, and I've Already Set the Direction for the Organization
- ❖ Reason #5: We Don't Have the Money to Do It
- ❖ Reason #6: We Don't Have Support From the Board/Top Management

<https://www.gma-cpa.com/blog/6-bad-reasons-for-not-having-a-strategic-plan-for-your-nonprofit>

Attributes of an **Effective Nonprofit** Board Member



- ❖ Commitment to the *mission* of the organization.
- ❖ Understanding of the board's *governance roles*.
- ❖ *Active involvement* in board activities, committees.
 - ***Thinking and acting strategically*; not involved in day-to-day management of the organization.**
- ❖ Abiding by the Duties of *Care, Loyalty and Honesty*.
- ❖ Supporting the organization both *financially* and through *advocacy*.

Developing the strategic plan is the responsibility of the Board



- ❖ Executive Director and staff may play a role in development but be careful the board does not abdicate their authority!
- ❖ Although allowing the Executive Director to develop the plan is tempting....
 - ❖ May not have the same vision as the board
 - ❖ May develop a plan that is in their self-interests
 - ❖ No longer a functioning nonprofit
 - ❖ Does not allow for multiple perspectives
 - ❖ Disengages all others, especially the board
 - ❖ It is **NOT** their job

Developing a Meaningful and Effective Strategic Plan



- ❖ ~~10-year Plan~~
- ❖ Rather, 10-year vision and annual yearly work plans
- ❖ ~~To do list for staff~~
- ❖ Rather, everyone associated with the organization has a role in the success of the plan
- ❖ ~~25 pages with abundant goals~~
- ❖ Rather, 3-7 real S.M.A.R.T Goals



SMART Goals

- ❖ Specific
- ❖ Measurable
- ❖ Accountable (Achievable)
- ❖ Realistic (Relevant)
- ❖ Time-Bound



Success of the plan is EVERYONE's Responsibility



The Board has ultimate responsibility for setting the organization's Strategic Direction.



- ❖ Annual planning retreat.
- ❖ Strategic plan is kept alive.
- ❖ Progress reports at *every* Board meeting.



Developing “our” strategic plan

No better way to learn than to do!



7 Reasons Strategic Plans Fail



1. Unrealistic goals or lack of focus and resources
2. Plans are overly complex
3. Financial estimates are significantly inaccurate
4. Plans are based on insufficient data
5. Inflexible/undefined team roles and responsibilities
6. Staffing requirements are not fully understood
7. Project scope inflexible to changes

<https://www.tempio.io/blog/2013/7-reasons-why-strategic-plans-fail-and-how-you-can-avoid-them>

“Our” Organization

Tip: 5 to 10 year vision rather than a one-year goal



Vision
No one is ever hungry in our community



Mission
Collect and distribute food



Board Brainstorm
Ensure everyone gets a hot lunch every day

Board Goal Development



- ❖ Specific
- ❖ Measurable
- ❖ Accountable (Achievable)
- ❖ Realistic (Relevant)
- ❖ Time-Bound

Tip: It is very difficult to develop a goal that includes all so pick two



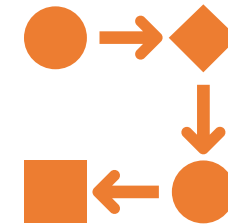
Identifying When a Goal is “Good”



When is the goal complete?



What does success look like?



How do we know when we are done?

“Our” Organization - Board Goal



- ❖ By **December 31, 2023**, we will have developed a **written plan** to collect and distribute hot lunches to **all construction workers** in our community. Implementation, January 1, 2024.

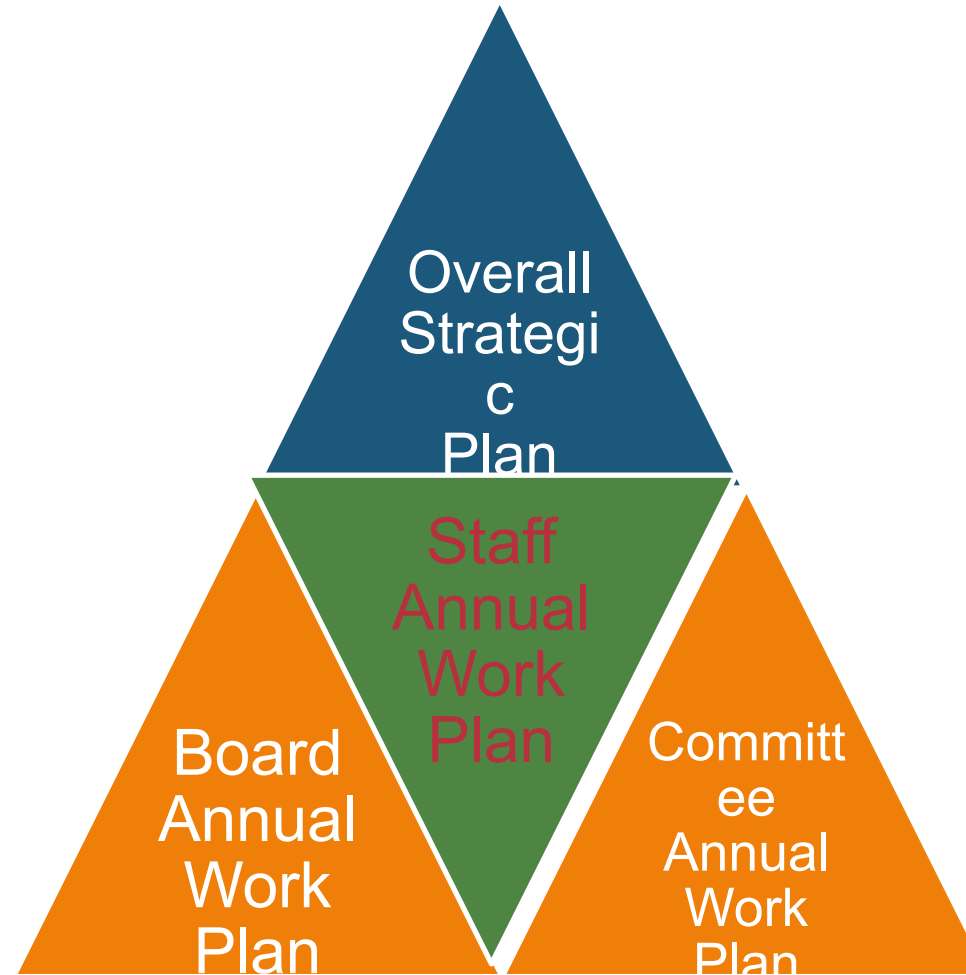
Tip: Start with an end date to ensure that you meet at least one of the SMART criteria

“Our” Organization - What do we need to know? *(i.e. Work Plan Development)*



- ❖ How many construction workers and how many lunches?
- ❖ How do we account for allergies and taste preferences?
- ❖ How will we pay for this?
- ❖ How do we communicate this to our community?
- ❖ What are our infrastructure needs?
- ❖ Who will distribute the lunches?
- ❖ Who will be our community partners?
- ❖ How do we register participants?
- ❖ How do we conduct an assessment?

Success of the plan is EVERYONE's Responsibility



“Our” Organization



Board

Staff

Marketing
Committee

Finance
Committee

Donor
Development
Committee

Friends

Identifying Work Plan Responsibilities



- ❖ How many construction workers and how many lunches?
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The Board has ultimate responsibility for setting the organization's **Strategic Direction**.



- ❖ Annual planning retreat.
- ❖ Strategic plan is kept alive.
- ❖ Progress reports at *every* Board meeting.
 - ❖ Board Reports
 - ❖ Staff Reports
 - ❖ Committee Reports





What Could Go Wrong?



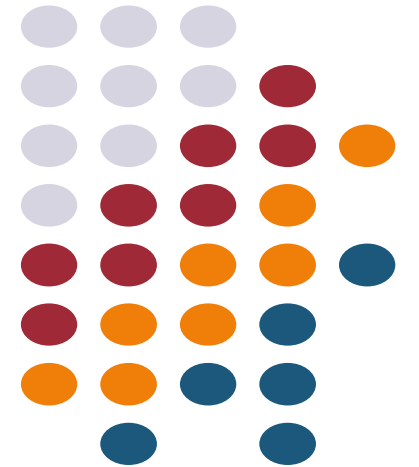
- ❖ Too big a goal?
- ❖ Need more time?
- ❖ Need more funding?
- ❖ Need more staffing?
- ❖ No real need in the community?

Tip: It is ok to change goals when unforeseen circumstances occur.

Tip: Research can be a goal & you can choose not to complete a goal!



Tips for Moving Forward



What happens when an organization has no coherent strategy?



- ❖ Lack of Objectives
- ❖ Resources Not Properly Allocated
- ❖ Unclear Organizational Structure
- ❖ Communication Flow Not Coherent
- ❖ Take Action: Identify Your Purpose
- ❖ Develop a Fluid Plan

<https://smallbusiness.chron.com/operational-strategy-problems-34248.html>

Facilitators



- ❖ Strategic planning starts by identifying a facilitator with the skills and experience to ensure that your organization gets the most out of the process.
- ❖ Hiring an impartial facilitator from an outside firm ensures that your strategic planning sessions are not only effective but honest, by asking the hard questions that may otherwise be swept under the rug when attempting to facilitate the process in-house.

6 Things to Look for When You Hire a Strategic Planning Facilitator



1. They Offer Fresh Insight and an Outside Perspective
2. They Engage Everyone
3. They Keep the Process On Track
4. They Challenge the Status Quo
5. They Are Enthusiastic (I would add objective!)
6. They Have Proven Facilitation Experience

Checklist for Your Goals



- ❖ Research and Development is a good goal
- ❖ Budget?
- ❖ Staffing?
- ❖ Infrastructure?
- ❖ Technology?
- ❖ Volunteers?
- ❖ Stakeholders – donors as well as clients?
- ❖ Roles for board members and committees?

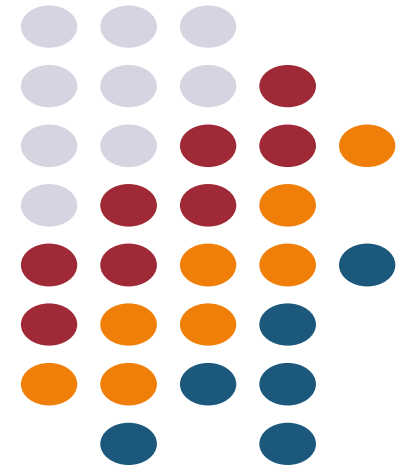
How to Implement Strategic Inquiry



- ❖ **The Problem:** Nonprofits are endowed with a deep desire to fix problems they see in society. However, the fixation on problem-solving can limit impact and be part of the problem.
- ❖ **The Context:** Strategic inquiry and planning can be seen as a luxury but this misses the value of deep thinking to enable nonprofits to pivot away from problems and toward possibilities.
- ❖ **The Solution:** Five steps nonprofits can take to implement strategic inquiry including building board support, listening to community, research, broadening networks, and sharing the journey.

https://blueavocado.org/leadership-and-management/strategic-inquiry/?utm_medium=email&_hsmt=250089750&_hsenc=p2ANqtz-8ZpFpKGsnjPIZbYMrMf0m6nYqUT8TumyqrhyQxfvqLnyKwaDa1Du4NCqm8pbdHPBcky2tsmivIIODIkSprYySsNzTDHZ9Dz7xYpp50r2U6lfAgfWI&utm_content=250089750&utm_source=hs_email

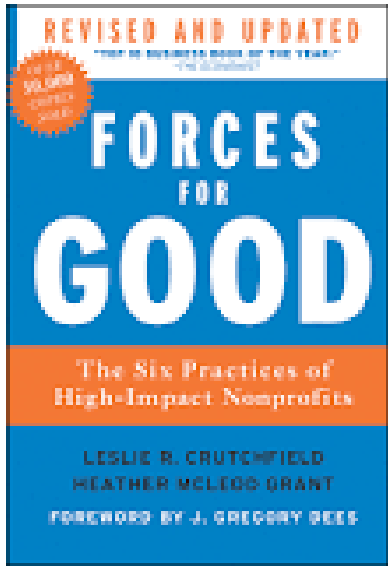
Nonprofit Resources



Favorite Nonprofit Websites



- ❖ [GrantStation](#)
- ❖ [Chronicle of Philanthropy](#)
- ❖ [Nonprofit Quarterly](#)
- ❖ [Blue Avocado](#)
- ❖ [BoardSource](#)
- ❖ [TechImpact](#)
- ❖ [TechSoup](#)
- ❖ [Nonprofit Risk Management Center](#)
- ❖ [Independent Sector](#)



Authors: Leslie Crutchfield and
Heather McLeod Grant



1. Advocate and Serve
2. Make Markets Work
3. Inspire Evangelists
4. Nurture Nonprofit Networks
5. Master Art of Adaptation
6. Share Leadership



Mary Beth Harrington, CVA



501c³ Empowering Nonprofits

San Antonio Area Foundation

TANO – Texas Association of Nonprofit Organizations

Austin Public Library Foundation

Volunteer Center of North Texas (Volunteer NOW)

Dallas Public Library

Carter BloodCare

Clients Include...



- ❖ Habitat for Humanity International
- ❖ Meals on Wheels of America
- ❖ US Tennis Association (USTA)
- ❖ Susan G. Komen
- ❖ Arkansas Literacy Council
- ❖ AFP Oklahoma and Texas
- ❖ Texas CASA
- ❖ Texas Association of Museums
- ❖ One Star Foundation/AmeriCorps
- ❖ United Way of Texas
- ❖ USTA Texas
- ❖ Corporation for Public Broadcasting
- ❖ Keep Texas Beautiful
- ❖ Literacy Texas
- ❖ Texas Library Association
- ❖ Junior League of Texas
- ❖ San Antonio Nonprofit Council
- ❖ Bike Texas/Dallas Bike Alliance
- ❖ Aberg Center of Dallas
- ❖ Dallas/Fort Worth Tourism Council
- ❖ Washington Nonprofits

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Always!



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- ❖ Succession Planning
- ❖ Change Management
- ❖ Advocacy
- ❖ Understanding the Nonprofit Sector
- ❖ Social Media & Marketing Courses

Our services start with a **free** conversation to access your situation; together we then determine what elements of support you may need and provide you with an individualized proposal based on those needs and budget. Through our skilled diagnosis, we ensure that you receive the level of support you need at a price your agency can afford.

***Our mission is to Unleash the Power of the Nonprofit Community
by generating Confidence, Competence and Collaborations!***

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- ❖ Programs for Conferences and Resource Centers
- ❖ Customized Programs for Individual Nonprofits
- ❖ Strategic Initiative Retreats for Nonprofit Boards
- ❖ Nonprofit Interventions for Staff, Boards and Volunteers
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- ❖ Qualified LeadershipPlenty Courses
- ❖ Constant Contact - Authorized Local Expert
- ❖ Certified CCAT (Core Capacity Assessment Tool) Evaluations
- ❖ Association Management Consulting Targeting Membership Growth Dynamics
- ❖ Volunteer Program Assessments

Free Nonprofit Career Counseling for Universities as well as Individuals

Free Nonprofit Referrals and Resources

FREE ADVICE AND COUNSEL

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