

Strategic Planning in Nonprofits

Overview

Strategic planning is vital to nonprofit organizations. A quality plan clarifies the strategic direction of the organization and strategies that will be used to achieve the organization's vision while also ensuring organizational health and sustainability. Strategic Planning in Nonprofits (SPiN) is a tool kit designed to make strategic planning more accessible and manageable for nonprofits. We've simplified the planning process to its essential elements. In this workshop, we'll discuss how to set your organization up for a successful planning process. We will review six phases in the planning process, and you will leave with the tools to lead the development of a strategic plan for your organization.

Webinar

Strategic Planning in Nonprofits with Laura Pierce

<https://vimeo.com/240751452>

Date: October 16, 2017

In this webinar you'll learn:

- How to set your organization up for a successful planning process
- The six phases in the planning process
- The tools to lead the development of a strategic plan for your organization

Presenter

Laura Pierce, Washington Nonprofits Executive Director

Laura Pierce became Washington Nonprofits' Executive Director in May 2017 after serving as the organization's Interim Executive Director and having been a member and partner with Washington Nonprofits for many years. She has been the owner and principal consultant of Laura Pierce Consulting. Laura has worked in and with nonprofit organizations since 1989, including fund development, community organizing, and executive management positions. Since 1998, she has consulted with a wide range of nonprofit organizations, assisting with strategic planning, board development, organizational assessment and capacity building.

Resources needed

1. Computer. We recommend you download the webinar onto the desktop so that you aren't relying on the Internet.
2. Projector/screen or HD television.
3. Handouts & Tools - Discussion Guide, [Strategic Planning in Nonprofits Powerpoint Handout](#), SPiN Flowchart, Short Videos, Key Documents

Strategic Planning in Nonprofits

Discussion Guide

Key questions

- What is Strategic Planning?
- What are the six stages of the strategic planning process?
- How is each kit organized?
- Why is strategic planning important?
- What are your key questions?
- How can you align your resources to ensure that you can reach your goals?

Key parts of the video

05:18– 06:43 – **How is each kit organized?**

Laura talks about how each kit in the Strategic Planning in Nonprofits workshop is broken up into why, know, show, grown, and go.

- Why is this stage of planning important?
- What does your Strategic Planning Team need to know?
- What actions should you expect at this stage?
- What will your Strategic Planning Team produce at this stage?
- What are some ideas that work?

06:43-08:24– **What is Strategic Planning?**

Laura talks about the thoughtful process of coming together to resolve questions.

- What is most important for success?
- How do you stay relevant?
- How do you leverage the knowledge of staff, board, and community?

08:24-17:33 – **Why is strategic planning important?**

Laura discusses why strategic planning is important and the power of engagement with your community.

- Do you spend time to reflect?
- What opportunities does strategic planning bring to your organization?
- How do you convince others to engage in the planning process?

17:33-20:23 – **Where is your organization?**

Laura asks participants to vote on where they see their organization in the strategic planning spectrum.

- Take a look at the polling options and rate your organization.

20:23-29:02– **Stage 1: Prepare**

Stage 1 of the Strategic Planning process is to prepare

- What are the outcomes of this part of the process?
- Do you have buy in from your board leadership?
- How do you engage in planning that meets your needs?
- As you get ready to plan, what are the issues or questions you know you want to address?

32:18-58:41– Stage 2: Listen

Laura talks about listening to your key stakeholders and how to engage them in the planning process.

- What is an organization health check-up?
- Do you know about other organizations?
- Are you realistic about time and energy?
- Who are your key stakeholders?
- What is your funding model?

58:42-1:03:39 – Stage 3: Envision

When your organization invests time to develop or renew a powerful mission and vision, you will be able to answer the questions “Who are we?” and “Why do we exist?”, have a strong connection to your organization’s core purpose, and set the stage for a strong, well-grounded strategy.

- What is a mission statement?
- What is a vision statement?

1:03:39-1:14:16 – Stage 4: Plan

Laura discusses how planning helps you to chart a course to turn your vision into reality; determine what actions best support your Mission and Vision; ensure that your plan is right-sized and achievable by analyzing resource and capacity issues; inspire others to take action to help your organization to succeed.

- What makes a well-balanced plan?
- Who are key people responsible for implementation?
- Are your plans achievable?
- How do you keep objectives “SMART”?

1:14:16-1:17:53 – Stage 5: Execute

The execute stages is to ensure that you continue to utilize the plan framework and hold yourselves accountable to reach your goals.

- What are your thoughts about how to keep the plan a living document?
- How can you align your resources to ensure that you can reach your goals?
- What questions do you have about the “execute” phase?

1:17:53-1:21:41– Stage 6: Evaluate

The last stage is to evaluate whether your activities are producing desired results or change you were seeking to accomplish and increase your impact.

- How do you track your progress?
- What indicators or matrixes do you use to track your process?

Actions to take the next step

- Do you think it would be valuable for your organization to engage in planning at this time?
- Reflect: What do you think your next steps should be?

Resources for further information

Website: www.wanonprofitinstitute.org/learning/planning/

Sign-up for our next strategic planning cohort at www.washingtonnonprofits.org