Strategic Planning in Nonprofits (SPiN) was created by Washington Nonprofits to help nonprofits across Washington develop plans that strengthen their ability to achieve their missions.

It is part of a series:
- Boards in Gear
- Finance Unlocked for Nonprofits
- Let's Go Legal

Washington Nonprofits makes sure nonprofits have what they need to succeed. We are your state association.

www.washingtonnonprofits.org

With support from Satterberg foundation
Strategic Planning in Nonprofits
http://www.wanprofitinstitute.org/planning

- Short videos
- Kit
- SPiN Flowchart
- Key documents

SPiN Flow Charts

Goals for Today
- Understand the stages of the strategic planning process
- Talk about strategic issues your organization is facing
- Learn about resources available to help you plan

Your mission matters.
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?

How each kit is organized

Why each kit is organized

Know why

Show how

Grow to

Go ahead

What is Strategic Planning?

A thoughtful process

• Ask a series of questions

• Test assumptions

• Gather current data

• Anticipate future environment

• Make decisions/choices re: What is most important for success?
Why is strategic planning important?

Strategic planning gives you the opportunity to:
- Reconnect with vision and mission of the organization
- Increase ownership of organization
- Meet changing needs/deepen impact
- Define success together
- Ensure that you are all going in the same direction
- Increase accountability
- Improve communications and marketing

Alignment: Getting further faster

Where is your organization?

1. I couldn’t tell you our mission, and what the heck is a strategic plan?
2. We have a mission statement, but most of our board members were not involved in creating or revising it.
3. We understand our mission and have a shared vision for our organization. We don’t have a strategic plan, or we have a dated document that sits on the shelf.
4. In addition to a clear mission, we have a written plan with specific objectives and timelines. We look at it once in a while.
5. We have a compelling plan and monitor our progress regularly as a board. We have dedicated the resources to accomplish our goals, and a track record of success in creating a plan and then executing it.
• You are **ready**
• You have existing plan elements
• You understand approaches
• You **scale** to scope and stage of development
• You know your **history**
• You identify **key questions**

**Discussion:**
What are your key questions?

• As you get ready to plan, what are the issues or questions you know you want to address?
Common Key Questions

• How can we increase our impact?
• How can our nonprofit be more sustainable?
• Should we take on a new program area?
• How can we focus our work better?
• Is there anything we can stop doing?
• What does the community need most?
• How can we improve our organization’s visibility and/or reputation?

LISTEN

• You get input from key stakeholders
• Your organization’s overall health matters
• You know about other organizations
• You are realistic about time and energy

Who are your key stakeholders?

• What groups of people care about, support and/or benefit from your work?
• Who do you need to consult to get good information and ensure community buy-in for your plans?
Questions about the Listen phase?

- Your core purpose and philosophy are expressed through your **mission** and **vision**
- Your **Mission Statement** communicates why your organization exists and what you do
- Everything ties to achieving your **Mission**
- **Vision** and **Values** guide everything you do
Mission & Vision

• Mission: clear, concise, easy to remember statement of purpose
  To improve foster care and end youth homelessness. (Mockingbird Society)

• Vision: A statement of what the world will be like when you have achieved your mission
  Our vision is a vibrant and healthy community with strong, well-nourished families as the foundation. (FamilyWorks)

Our Mission
We bring food and hope to our neighbors...because there can be enough for everyone.

Our Vision
Our vision is to create a neighborhood hub where individuals and families come together to help one another and ensure that all neighbors have access to healthy food, community service providers and resources, and opportunities to build a strong, healthy community through storytelling, understanding and advocacy. We believe that hope is a basic human right and that together as neighbors we can achieve this.

ENVISION

• The online tool kit has resources to help you review your mission statement
• There are exercises you can do to help the group be more visionary
• Values are an optional component
**PLAN**

- You **prioritize**
- Your plan attends to both **programs** and **organizational health**
- **People responsible** for implementing objectives and timelines are involved
- Your plans should be aspirational but **achievable**

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**Ballard Food Bank Program Priorities & Framework**

- **Access to Nutritious Food**
- **Neighbors Ballard, Magnolia & Queen Anne**
- **Achieve Self Sufficiency**
- **Advocate for Ending Hunger**

### Ballard Food Bank Program Priorities & Framework

- **Increase Neighbors Access to Nutritious Food**
  - Develop innovative program strategies to build community between all neighbors around food and nutrition education.
  - Expand the availability of healthy and culturally relevant food to clients, especially seniors, children and homeless.

- **Improve Access to Programs that Enable Self-sufficiency**
  - Build a stronger network with key partners, especially those in the North End, to gain access to resources and internalize program linkages to other organizations.
  - Expand client access to resources and launch connector program with partnership organizations.

- **Grow Neighbors Capacity to Advocate for Ending Hunger**
  - Strengthen partnerships with other local, county and state groups.
  - Build community engagement and inspire action through leadership development, community education, storytelling and advocacy.

- **Strengthen Organizational Capacity to Achieve the Programmatic Strategic Priorities**
  - **Communications** - Develop a comprehensive communications plan to increase visibility, education and engagement.
  - **Volunteers** - Build a volunteer management program that focuses on recruiting, retaining and supporting volunteers.
  - **Facilities** - Ensure that the Ballard Food Bank has a home with adequate space for its programs and a long-term facility plan.
  - **Financial Health** - Strengthen funding relationships with partners and steward financial resources effectively.
  - **Staffing** - Provide opportunities for staff to develop and grow within the organization.
  - **System** - Implement systems to improve communications, inform decision making and continued improvement.
Plan Excerpt – Tutoring Program

<table>
<thead>
<tr>
<th>Objective</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
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<tbody>
<tr>
<td>PROGRAM EXPANSION: Expand and strengthen our program, and prevent summer reading loss.</td>
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<tr>
<td>1. Determine required resources and staffing to support expanded program, identify appropriate partner schools (Staff)</td>
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<td>2. Expand core program from ten to fifteen schools (Staff)</td>
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<td>2. Add two schools in 2013 and three more schools in 2014 (Staff)</td>
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<td>3. Improve tutor, teacher and parent communications to ensure effective expansion, increasing survey response rate to 50% and satisfaction to near 100% (Staff)</td>
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<tr>
<td>4. Leverage partnership with district literacy specialists to serve more students (Staff)</td>
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Keep your objectives “SMART”

- **Specific**
- **Measurable**
- **Attainable**
- **Results-oriented**
- **Time-determined**

**Examples:**

- The Education department will develop a new half-hour outreach presentation on drunk driving, including a written teacher’s guide, by August 2018.

- The volunteer coordinator will recruit and train 20 new volunteer mentors by conducting outreach at a minimum of five community events and offering two mentor trainings in April and September of 2018.

Questions about the Plan phase?
**EXECUTE**

- You **align your resources** to accomplish your plan.
- **Mid-course corrections** are allowed and expected.
- You **celebrate** accomplishments.

**Ballard Food Bank: Implementation**

Over the next three years the Ballard Food Bank will stagger the growth of these program priorities. This will allow us to build capacity (financial and human resources) over a three year period.

Year 1: Access to nutritious food (food purchasing, food education). Maintain other programs at current levels.

Year 2-3: Maintain expanded food access and begin strengthening self-sufficiency programs and advocacy.

**Discussion: Ideas to support implementation**

- 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?
EVALUATE

• You track your progress
• The Board has responsibility to ensure that the organization is making a difference.
• You identify indicators to track progress

LAUNCH

What is your appetite for evaluation?

Small

Medium

Large

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Discussion: Next Steps for You

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

Laura Pierce
Executive Director
Washington Nonprofits
laura@washingtonnonprofits.org