



**SPiN**  
STRATEGIC PLANNING  
IN NONPROFITS

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**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

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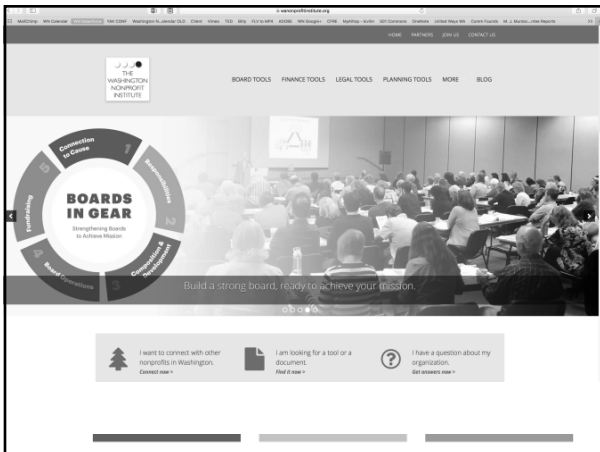
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**Strategic Planning in Nonprofits**  
<http://www.wanoprofitinstitute.org/planning>

- Short videos
- Kit
- SPiN Flowchart
- Key documents

**LISTEN:** When an organization's leadership knows about the people you serve and other relevant data about your program and organization, your strategy improves, and you gain respect among your key audiences. You will be able to tell your story better, and your relationships and community impact will grow. Let's start with a Nonprofit Health Check-up.

**SPiN-LISTEN (2016)**

- Resources
- Resources for Organizational Assessment and Financial Analysis
- Stakeholder Outreach Plan
- Stakeholder Engagement Primer
- SPiN Analysis Sheet (pdf)

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**SPiN Flow Charts**

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**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.**

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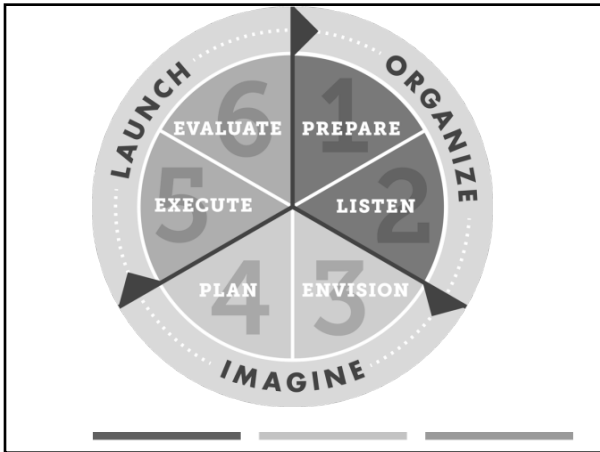
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### How each kit is organized

<b>WHY</b>	<b>KNOW</b>	<b>SHOW</b>	<b>GROW</b>	<b>GO</b>
<i>Why is this stage of planning important?</i>	<i>What does your Strategic Planning Team need to know?</i>	<i>What actions should you expect at this stage?</i>	<i>What will your Strategic Planning Team produce at this stage?</i>	<i>What are some ideas that work?</i>

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### 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?

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### 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

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### Alignment: Getting further faster



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### 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.

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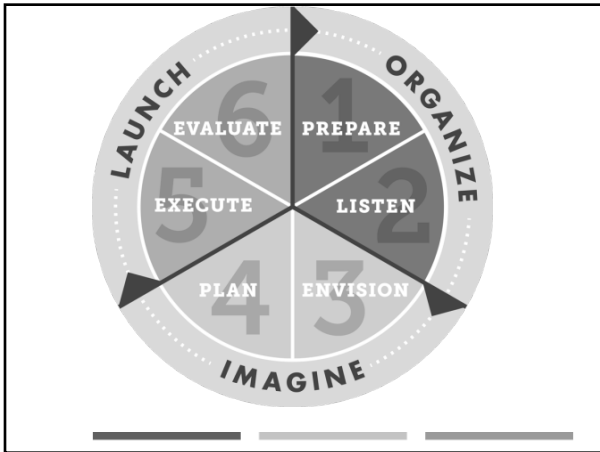
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## 1 PREPARE

- 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**

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

- As you get ready to plan, what are the issues or questions you know you want to address?

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### 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?

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### 2 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

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### 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?

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**Ballard Food Bank Stakeholder Outreach Plan**

Stakeholder Type	Type of Contact
Staff	all staff meeting
Clients	survey
Volunteers	focus group at monthly volunteer meeting
Donors	online survey
Local businesses and grocery stores	phone interviews
Churches	focus group

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**LISTEN**

Questions about the Listen phase?

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**ENVISION**

- 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

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## 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)*

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**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.

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- 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

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# 4 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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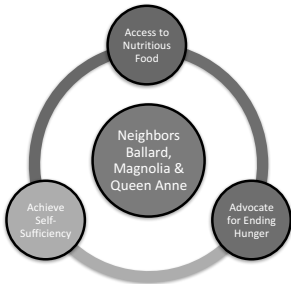
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## Ballard Food Bank Program Priorities & Framework




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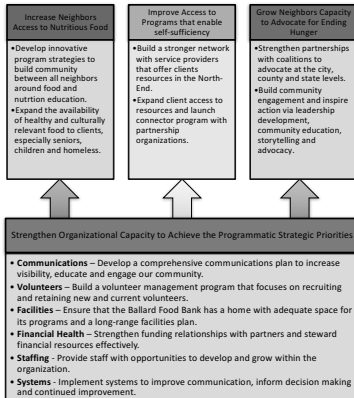
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## Plan Excerpt – Tutoring Program

Objective (Lead)	2012	2013	2014
<b>PROGRAM EXPANSION: Expand and strengthen our program, and prevent summer reading loss</b>			
<b>Expand core program from ten to fifteen schools</b>			
1. Determine required resources and staffing to support expanded program; identify appropriate partner schools (Staff)			
2. Add two schools in 2013 and three more schools in 2014 (Staff)			
3. Improve tutor, teacher and parent communications to enable effective expansion, increasing survey response rate to 50% and satisfaction to near 100%. (Staff)			
4. Leverage partnership with district literacy specialists to serve more students (Staff)			
<b>Improve core program, with a goal of 75% of elementary students achieving reading standard</b>			
1. Assess curriculum/intervention strategies to determine how to improve reading outcomes for 2 <sup>nd</sup> and 3 <sup>rd</sup> graders (Staff)			
<b>Pilot tutoring program to address summer reading loss, improve and expand in subsequent years</b>			
1. Convene advisory group to assist in design of summer program (Staff)			
2. Pilot summer reading program at one site in 2012 (Staff)			
3. Evaluate and improve summer reading program model, expanding to serve more kids and/or multiple sites in 2013 and 2014 (Staff)			
<b>Develop new evaluation model using district-wide assessment data</b>			
1. Develop new evaluation model that uses district-wide reading assessment data, with assistance of outside evaluation team (Staff, Program & Partnerships)			
2. Evaluate summer program effectiveness (Staff, Program & Partnerships)			
3. Conduct needs assessment to plan program expansion (Staff, Program & Partnerships)			

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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.*

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Questions about the Plan phase?

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## EXECUTE

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




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### 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.




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### 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?




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

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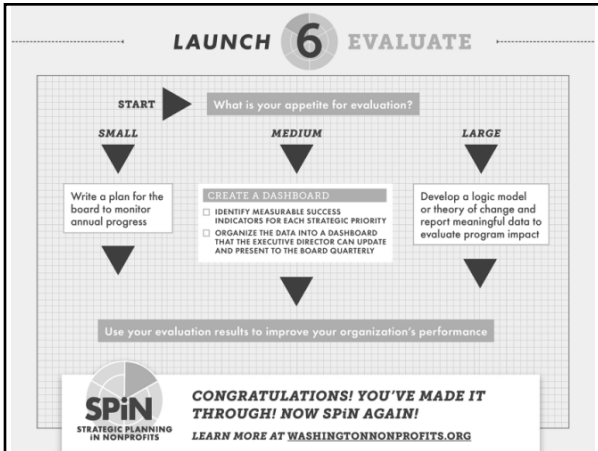
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### Sample Reporting Dashboard

Peace Community Center - Strategic Plan Update January 2011



**Red** - needs immediate attention, not moving in right direction, has not gotten off the ground.  
**Orange** - needs attention, face challenges moving forward, is behind schedule.  
**Yellow** - keep eyes on, moving in right direction but some challenges/hurdles remain.  
**Green** - celebrate, on schedule and in line with priorities and mission.

Strategic Plan Initiative 1 - HS Life Skills Program (CLASS)		
Offered for Tacoma Public Schools credit		Complete
Funding to hire staff member to teach		Complete
Design four-year multifaceted curriculum		Overarching Design Complete, In-depth Curriculum in Process
Serve 60 students per year		25 Students Enrolled

Strategic Plan Initiative 3 - Middle School Program		
Design Middle School Program by assessing community needs & current programming, and best practice		Complete
Raise the needed funds to implement program		Plan in place, need more support
Hire program director		NA
Implement Middle School Program		NA

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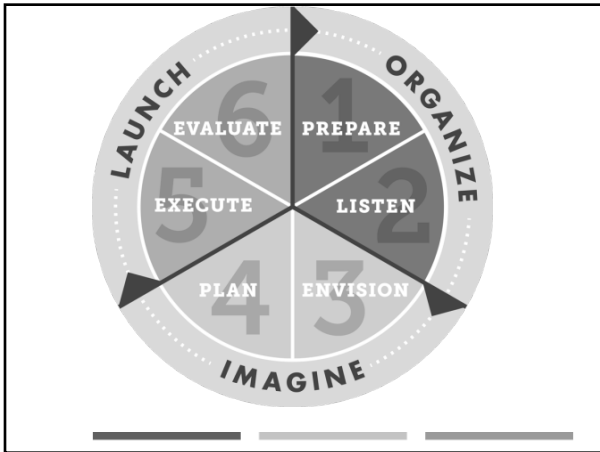
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### Discussion: Next Steps for You

- 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?

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