

Strategic Planning for Non-Profits

Strategic planning may be widely associated with large corporate entities, but it's an important instrument for organizations of all sizes and types. A strategic plan furthers an agency's mission by determining the priorities for a set time. A thoughtfully developed strategic plan is not only essential for growth but it's a critical alignment tool to ensure that your team all row in the same direction and to the same place!

If a strategic plan is so vital, then why do so many non-profit organizations lack one?

Leaders say they don't have the time to engage in planning and that the need to just manage the daily running of their organization prevents them from comprehensive planning.

It's true that the idea of strategic planning often feels complex and ambitious, but most organizations are already engaging in the precursors to strategic planning. If your agency has ever examined its structure, considered trends or discussed additional services to provide, then you are already engaging in strategic thinking, the basis for strategic planning. Here's some food for thought on why non-profits should prioritize formalizing that strategic thinking into an actual strategic plan:

1. Focuses on big picture issues and longer-term view rather than on daily "fires"
2. Aligns stakeholders to work towards the same goals and priorities
3. Provides a blueprint for continuity and organizational sustainability
4. Illuminates organizational/brand identity to both the internal and external world
5. Grantmakers and other funders ask for them
6. Improves the credibility of your organization
7. Outlines overarching goals, offers strategic outcomes, and measures agency impact
8. Defines strategic partnerships and collaborations
9. Part of board members' role is to provide strategic focus for an organization's long-term health
10. Offers a framework for decision making. This might perhaps be the most important consideration. **Strategic plans are as much about what your organization will not be doing as they are about what you will be doing.** It's always exciting when a new opportunity arises and having a strategic plan will serve as the guide as to whether an opportunity makes sense for your agency.


Now that I've convinced you to adopt a written strategic plan, here are few critical recommendations:

1. Limit the plan to three to five overall strategic objectives that are realistic and achievable.
2. Include specific action steps with corresponding resources, timelines, and metrics to monitor progress with each strategic objective. This is key to ensuring implementation.
3. Assign responsibility to specific named team members to help ensure accountability.
4. Add strategic plan review to the agency's calendar on a quarterly basis at a minimum.
5. Recognize the plan as a flexible document that should be amended as needed. In fact, include a section with directions on how to amend the plan as well as a "Revisions Page" to track plan changes and versions.

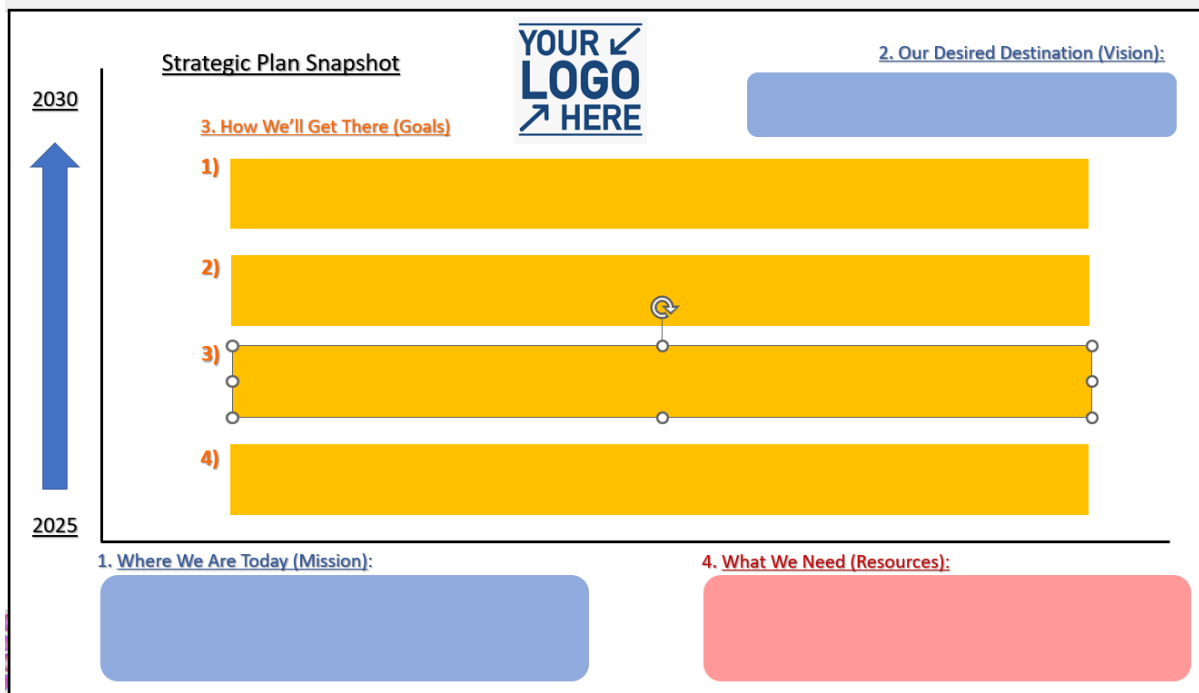
But wait, there's more!

Sheer Strategy has a few handy simple tools to get you started on your way to strategic planning.

Use this **tracking tool** or create a similar one in a spreadsheet to monitor progress on your strategic objectives and action plan steps:

 Tracking Tool for Strategic Objective: _____					
Tracking tool completed by: _____ (Name Committee Chair/Staff)					
Action Plan Steps	Metrics Utilized	Date Fully Achieved	Date Partially Achieved	Notes and Date Of any Amendments	Notes and Date Discontinued

Once you've developed your full strategic plan, summarize it in this **graphic snapshot** of your strategic priorities to help guide discussions and inform decisions. It would be impossible to view the full plan daily, but this one-page snapshot can sit front and center above your desk!



Strategic planning can be greatly enhanced by third party facilitation which provides an "outside" perspective, energizes participants, and helps groups maintain focus.

Sheer Strategy's philosophy is to engage and excite stakeholders by involving them in a process that uses improvisational and exploratory exercises to draw out strategic ideas. For comprehensive **strategic planning services** please visit sheerstrategy.com or contact us at (215) 680-0684 or at maddyschiering@sheerstrategy.com.