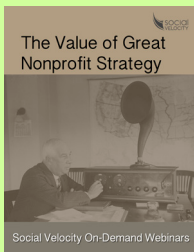




## A Great Strategy Transforms Your Nonprofit

In an increasingly competitive, resource-strapped world, great nonprofit strategy is less a luxury and increasingly a necessity. Without an overall strategy, a nonprofit is relegated to the world of “doing good work,” instead of the world of “making a real difference.”



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## CASE STUDIES

To learn more about what a strategic plan does for Social Velocity clients, read the [Catholic Charities](#) and [Forte Foundation](#) case studies.

And these days more and more funders, supporters, advocates, partners and decision makers are requiring that nonprofits do more than just good work.

Smart nonprofit strategy can completely transform your nonprofit. It will:

### Create Momentum

To really tap into people’s potential you must inspire them to larger heights and help them understand their role in reaching those heights. A great strategic planning process does that.

### Attract Deeper Funding

People and organizations that make large gifts to a nonprofit are in effect investing in the future of that organization. And if you can’t articulate your future plans in a thoughtful, compelling way, funders won’t make that larger investment.

## TO LEARN MORE

To find out more about Social Velocity’s Strategic Plan Consulting, or to schedule a free consultation, call (512) 694-7235 or email [info@socialvelocity.net](mailto:info@socialvelocity.net)



## Filter Future Decisions

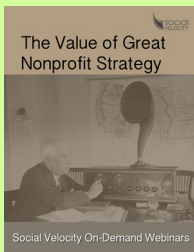
A great strategic plan doesn't tie your nonprofit's hands, rather it becomes a lens through which you can thoughtfully analyze future decisions and make the best moves for your organization.

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## Become a Management Tool

An effective strategic plan doesn't sit on the shelf, but rather is a living, breathing guide to the daily work and decisions of your organization. It's not a final product, it's a way of life.



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## Realize More Change

A great strategic planning process forces you to do the analysis, conduct the research, make the hard decisions, and track your progress so that at the end of the day you actually are making a difference.

## The Strategic Planning Process

Here are the 8 steps Nell takes your nonprofit through to create a strategic plan:

### 1. Create a Team

With the leadership of your nonprofit, Nell creates a strategic planning group made up of key board members, management staff and external stakeholders. This group meets periodically to guide the process, do the analysis, and create recommendations for the board to review and approve.

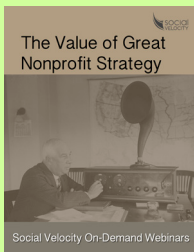
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## 2. Look Inside

Nell takes the group through a series of analyses and exercises to articulate your nonprofit's value, understand your core competencies, calculate the financial and social impact of your programs, and more.



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## 3. Look Outside

The group also takes a hard look outside your organization by mapping the marketplace in which you operate and researching your competitors and collaborators (those providing similar services in the community) and consumers (funders and clients) in order to understand your organization's unique niche.

## 4. Refine Vision and Mission

Given this internal and external analysis, Nell helps your nonprofit revisit and refine your vision and mission. The vision is the social change your nonprofit seeks, and the mission is the day-to-day activities driving toward that vision.

## 5. Develop Goals and Objectives

Nell then helps your nonprofit determine what you want to accomplish in the next 3+ years. She leads your organization to create 3-5 broad, measurable, achievable goals in the specific time frame of your plan, and then breaks each goal into the objectives to get there.

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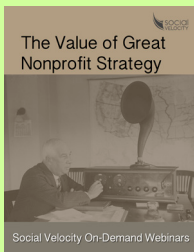
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## 6. Create the Financial Model

A successful nonprofit realizes that goals cost money and there must be a plan for the revenue and expenses necessary to execute. Nell works with your organization to create a multi-year projection of revenue and expenses based on the goals of your strategic plan.



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## 7. Operationalize

For each objective, Nell helps you create an operational plan with activities, deliverables, people responsible and due dates. This operational plan is put into a tracking system that staff use on a regular basis to update and refine the plan.

## 8. Monitor

Nell helps you develop a process to monitor and measure achievement of your plan. Staff and board meetings are driven by the goals and status of the plan. The strategic plan begins to drive daily activity at your nonprofit.



*Nell Edgington*  
President, Social Velocity

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## ABOUT SOCIAL VELOCITY

Social Velocity is a management consulting firm that helps nonprofits grow their programs, bring more money in the door, and use resources more effectively. The nonprofits Nell leaves behind are more strategic, sustainable, effective and above all, create more social change.