



Strategic Planning Process

Very few nonprofit organizations have a detailed, comprehensive strategic plan. Yet the payoff to a good strategic plan can be enormous: better program results, more effective use of resources, improved staff morale, more engaged board of directors, and more funding flowing to the organization. And in these days when resources are tighter than ever, a solid, well-thought out plan ensures that every last resource (financial, staff, volunteer) are used most effectively.

A successful strategic plan lays out a clear path over a future period (3-5 years) with concrete steps to get there and benchmarks along the way to make sure that you do. Then, the plan is revisited, measured, updated by all involved, monthly, if not daily. In essence a good strategic plan is very simple: this is where we want to be, this is how we are going to get there, now get to work.

Below is the process Social Velocity takes nonprofits through in a strategic planning process. We believe that it is critical that an outsider leads this process. If a staff or board member facilitates there will be a bias to the process and the results will be suspect. An objective third party can ask the hard questions that others within the organization are afraid to, make sure that discussions stay on track, keep the end goal always in sight, and ensure that an organization doesn't just settle back into their normal way of doing things.

There are 7 basic steps to Social Velocity's strategic planning process:

1. **Create a Team:** Create a strategic planning working group/committee made up of key board members, and management staff and external stakeholders, if appropriate. This group will meet periodically to guide the process, create recommendations and suggested directions for the board to review and approve, finalize the plan and make sure it is being executed.
2. **Analyze the Internal Situation:** An organization must uncover the strengths and weaknesses of the internal organization by surveying staff, board, and other key constituents to the organization. The organization must also articulate their theory of change. It is no longer enough to simply do good work; in an increasingly competitive landscape, a nonprofit organization must articulate how they translate resources (funding, staff, board, volunteers) into change to a social problem. A theory of change, or logic model, helps the organization articulate what they exist to do. From that articulation, a strategic direction can be born.
3. **Analyze the External Environment:** In order to chart a strategic direction it is not enough to understand what is going on internally. The nonprofit must research their competitors (those providing similar services in the community) and consumers (funders and clients) in order to understand trends. With market research in hand, the organization can map their external environment and how their core competencies relate to community needs and the competing forces working to address those needs.

4. **Refine Vision and Mission:** Given their internal and external analysis, the organization must then revisit and refine their vision and mission. These two statements are very different, but often confused. The vision of the organization is the future reality in the external world that the organization would like to see, for example: "An end to homelessness." It isn't necessarily achievable, but it is what the organization is striving to make happen. A mission is how the organization is working towards that vision. It describes the impact point and what the organization exists to do, for example: "To move the homeless population of Phoenix off the streets through access to education, healthcare and job training."
5. **Develop Goals and Objectives:** Given the vision and mission and the external environment, what does the organization want to accomplish in the next X years? Create 3-5 broad, measureable, achievable goals for the organization in the specific timeframe of the plan. More than 5 goals are too much for staff and board to focus on. Then break each of the 3-5 broad goals into 3-5 measureable objectives, or steps, to get there. What is it going to take to make each goal happen?
6. **Operationalize the Plan:** For each objective, a timeline with activities, deliverables, people responsible and due dates is created. This operational plan is put into a tracking system that all staff are comfortable with and will use on a regular basis to update and refine their activities.
7. **Monitor the Plan:** A process is established to monitor and measure achievement of the deliverables and the overall goals of the plan at least quarterly, and the plan is revised as needed. The strategic plan should drive activity at the nonprofit. As such, management team meetings should be based on the goals of the plan and what is being achieved or not achieved. Department meetings and board meetings should similarly be driven by the goals of the status of plan.

The key to a successful strategic plan is getting staff and board members involved and invested early and often. A good strategic plan doesn't have to be long, arduous and difficult to comprehend. To the contrary, the more basic and simple you can make it, the better. The end goal is that everyone in the organization will understand the overall plan and how their efforts fit into it. With everyone on the same page marching toward a shared vision, much greater social impact can be achieved.

For More Information

To learn more about this or other Social Velocity services, please visit our website at www.socialvelocity.net. If you would like to learn more about Social Velocity's strategic planning process, give us a call at (512) 694-7235.