

a powerful force
for **GOOD.**



Louisiana Association of
Nonprofit Organizations

Strategic Planning

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What is a strategic plan?



Strategic Map

Tells us where we are going

How we are going to get there

Leads us from where we are now to where we would like to be in 1 year, 3 years, 5 years.



...a **disciplined effort** to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the future

– John Bryson



*“I’m telling you
Harry, there is
something NOT
right about
Bob...”*



What is the role of your

- board?
- staff?
- CEO?

Board Roles in Strategic Planning

- Sets overall direction and communicates that to the organization
- Formally approves the strategic plan
- Assures alignment of overall staff, board, and committee work and planning
- Assures that strategic planning guides Board recruitment efforts
- Identifies continuing and current priorities and develops organization's financial plan accordingly

Board Roles in Strategic Planning

- Evaluates and updates the strategic plan
- Revises mission, vision, goals, strategic directions, and priorities
- Establishes criteria for successful outcomes and monitors outcome to assure quality and impact on an ongoing basis

Role of the CEO/Executive Director

- Develops/updates environmental scan
- Champions the mission and vision and provides continuity
- Interprets plan to staff, stakeholders, and general public
- Completes annual report of organization's and committees accomplishment in relation to strategic directions
- Assists President and Board with development and implementation of plan
- Set the schedule and sequence for evaluation, review and updating of plan

Role of the Staff

- Involved in implementing programmatic goals
- The first to know when something is not working
 - Can also be the first to derail you without proper buy in.
- Involve and listen to your staff throughout the entire process

A stylized landscape illustration featuring rolling green hills in the foreground, a small tree with a brown trunk and purple and pink foliage on the left, and blue and white wavy hills in the background. The text "Elements to Ensure Success" is written in a brown, cursive font in the center-right area.

Elements to Ensure Success



*Establish a
Committee*



*Commitment of
all leadership*



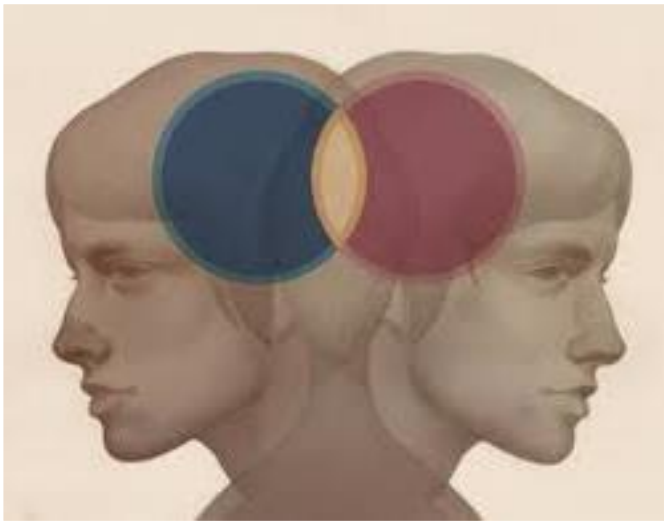
*Involvement of
many*

THE PLAN



I'm so glad we all agree

*Shared agreement
on outcomes by all
leadership*



*Shared
understanding and
commitment to
the process*

A stylized landscape illustration featuring rolling green hills in the foreground, a small tree with a brown trunk and purple and pink foliage on the left, and blue and white wavy hills in the background. The text is centered in the white area.

The Strategic Planning Process at a Glance

Concerted Effort – Information Gathering

Business Model – being clear about

- Who we are?
- What we do?
- How we do it?
- Do we know how well we do it?
- How do we finance it?

Market Awareness

Trends, Positions, and Competition

- What are the needs of our constituents?
- Where are we in the market?
- How did we get here?
- What are the emerging trends?
- Where do we want to go next?

Competitive Advantage

- What is it?

Tools to use.....

Surveys

- Clients
- Community
- Staff
- Board
- Funders

Existing Statistics and Studies

- Community indicators
- National Research

Tools, Data, Sources

Changes and trends

- Demographic data about our area
- Trends in Funding
- Public policy development
- Emerging needs and expectation

Internal Assessment data

- Evaluation of organizational capacity
- Organization performance indicators

A stylized, colorful illustration of a landscape. In the foreground, there are rolling green hills with dark brown soil. A small tree with green foliage and a brown trunk stands on the left. Next to it is a large, multi-layered flower with purple and pink petals. A small orange bird is flying in the sky above the tree. The background features more rolling hills in shades of green and blue, with a light blue sky. The text is positioned on the right side of the image.

Gather... Then Analyze Information

You can't layout the destination if you don't have all the information needed about where you should or could go.




What are the critical and strategic issues facing your organization?



Arrived at the scenic rest stop

Goal Setting – Objectives – Strategies



Power of the Question?

Brainstorming questions, not ideas, sparks creativity

*Do we value answers
more than questions?*





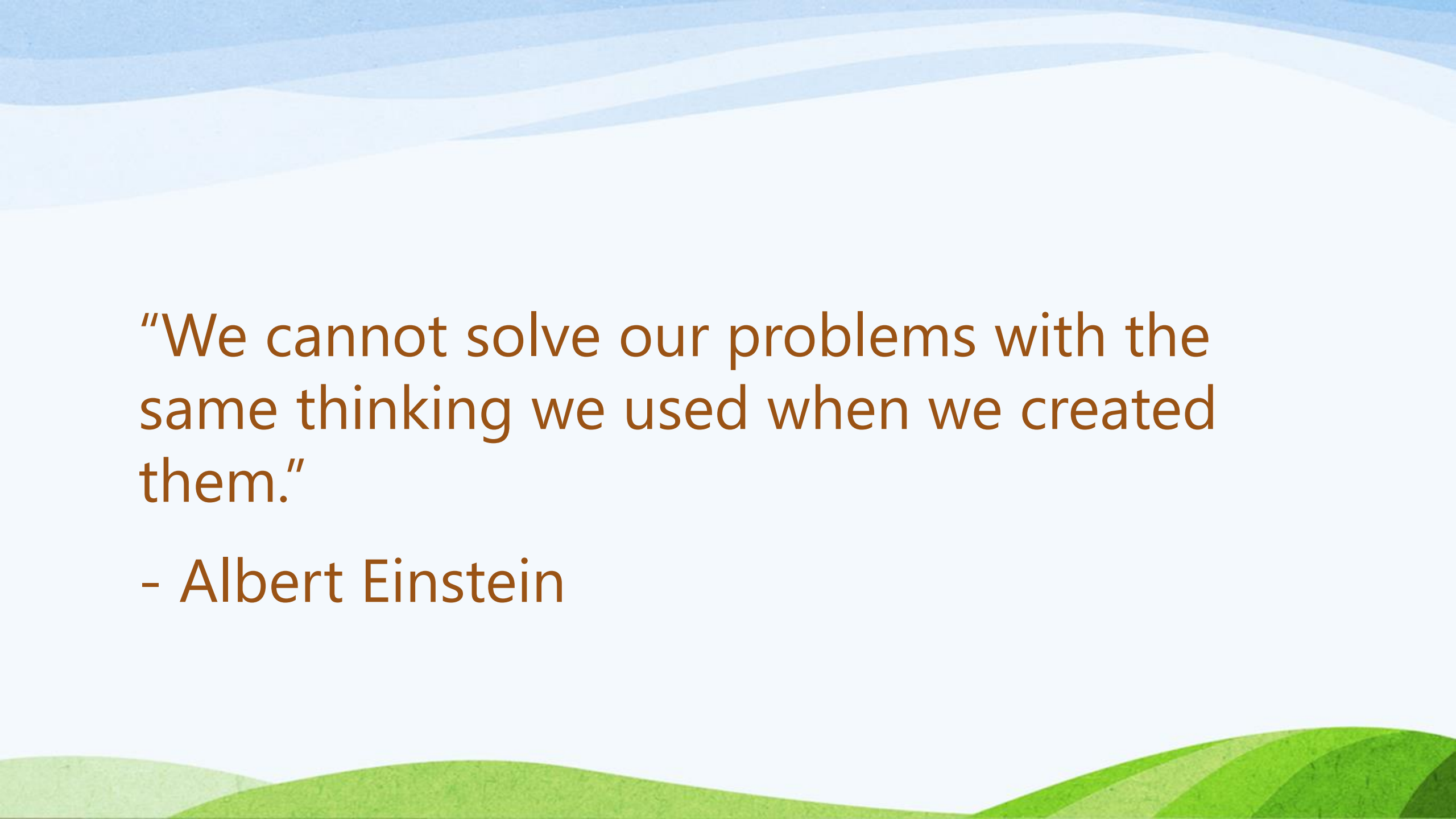
How can we accommodate visitors to our city when hotels are booked? Are people willing to make money renting out their homes?



Dad, why can't I see the picture now?



What would an upscale circus look like?



“We cannot solve our problems with the same thinking we used when we created them.”

- Albert Einstein

A stylized, colorful illustration of a landscape. In the foreground, there are rolling green hills with a dark brown path winding through them. On the left, a green tree with a brown trunk stands next to a purple flower with a pink center. A small red bird is flying in the sky above the tree. The background features more rolling hills in shades of blue and white, suggesting a distant horizon or sky.

Frame-Storming

Matthew May – Winning the Brain Game

Step 1

Design a Question –Focus

30% of our clients are not happy with our services.

Steps 2, 3, and 4

2. Generated questions
3. Improved questions
4. Prioritized questions
5. Developed goal statements

Shreveport Opera

- Question-Focus

The perception in the Shreveport/Bossier community is that the Opera is not for everyone.



Here is what I love about this process....

- What appears to be the problem sometimes isn't....
- What appears to be the solution will make you think again....
- What appears to be impossible isn't.....
- People love to ask questions when they may not have answers....



Development of Strategic Goal Statements

Broad statements of what the nonprofit hopes to achieve in the next 1, 3, and 5 years.



Development of Strategies and Objectives for Each Goal

Strategies – Statements or the means for attaining broad goals and resolving issues.

Objectives: Specific concrete, measurable statements of what will be done to achieve a goal generally within a 1, 3, or 5 year timeframe.



Goal - Expand and diversify the revenue base of LANO by 25% over the next 4 years.



Strategy –

Increase revenue of our signature event by 10% in the first year.



Objective - Establish a Fund Development Committee of 8 members and provide training on special events by July 1.

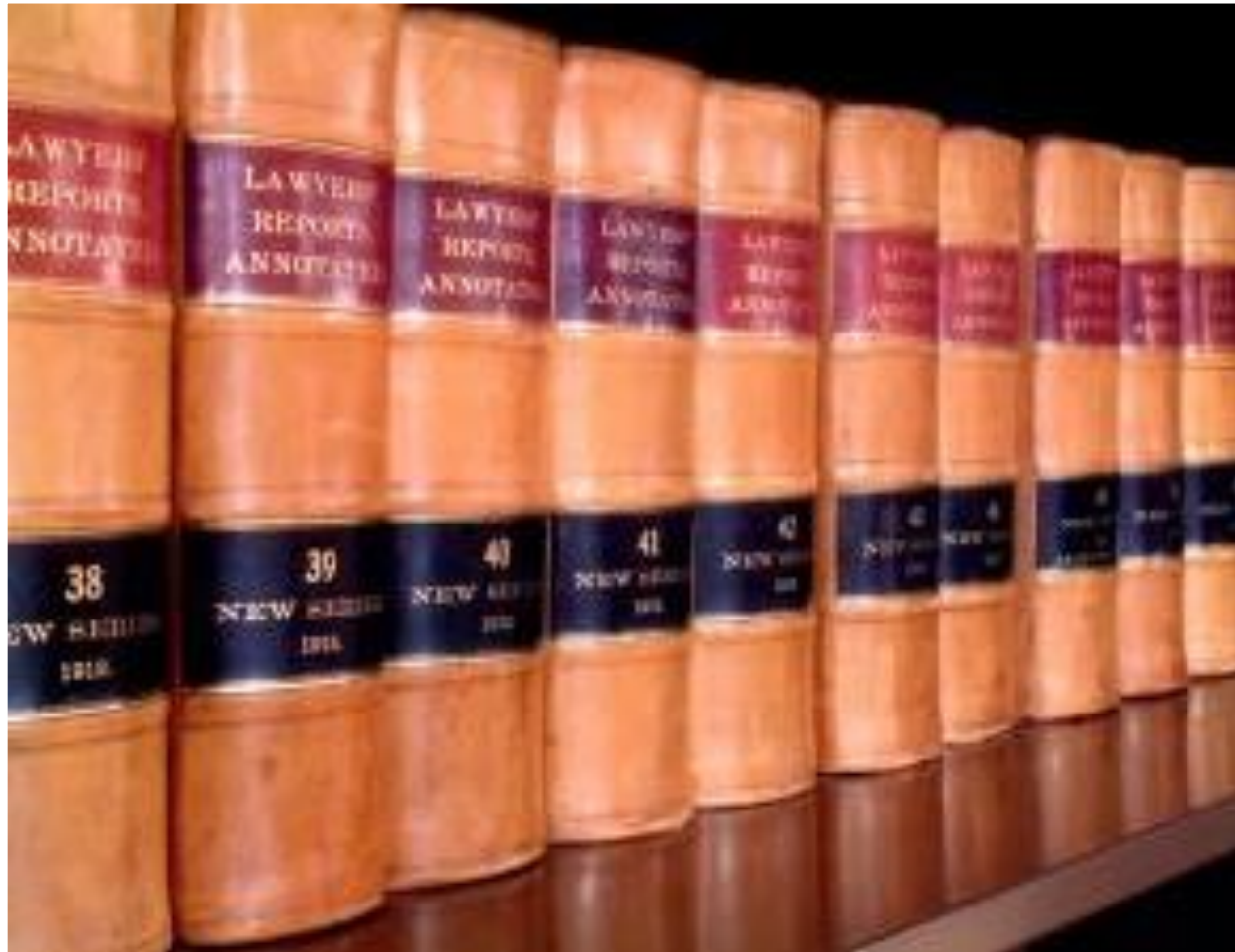
Work Plan





Reviewing the Mission

*Reminds us why we're on the journey in
the first place*



*Your plan does not
need to be a dust
collector!*

How do we keep the plan alive?

- Review progress at every board meeting
- Don't assume everyone is doing their job, hold people accountable.
- Assign someone on the board to be in charge of the plan
- If something is not working as planned, regroup!
- Stay in touch with your mission

Resources

- ["The Power of Why and What If?"](#), Warren Berger, *New York Times*
- ["How Brainstorming Questions, Not Ideas, Spurs Creativity"](#), RightQuestion.org

Books:

- *Strategic Planning*, Frank Martinelli, The Center for Public Skills Training
- *Winning the Brain Game: Fixing the 7 Fatal Flaws of Thinking*, Matthew May

Strategic Planning is a Journey

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