

What Does a Strategic Plan Look Like & How Do You Keep It Relevant?

Anushka Fernandopulle
CompassPoint Nonprofit Services

PLANET 501 C3 TALES FROM THE NONPROFIT GALAXY BY MIRIAM ENGELBERG

AT THE STRATEGIC PLANNERS PLANNING MEETING



© 6/1/01 COMPASSPOINT

WWW.PLANET501C3.ORG

What Is Strategic Planning?

- A systematic approach through which an organization agrees on priorities that are essential to its mission and responsive to its environment.
- Data based
- Guides resource acquisition & allocation
- Builds commitment

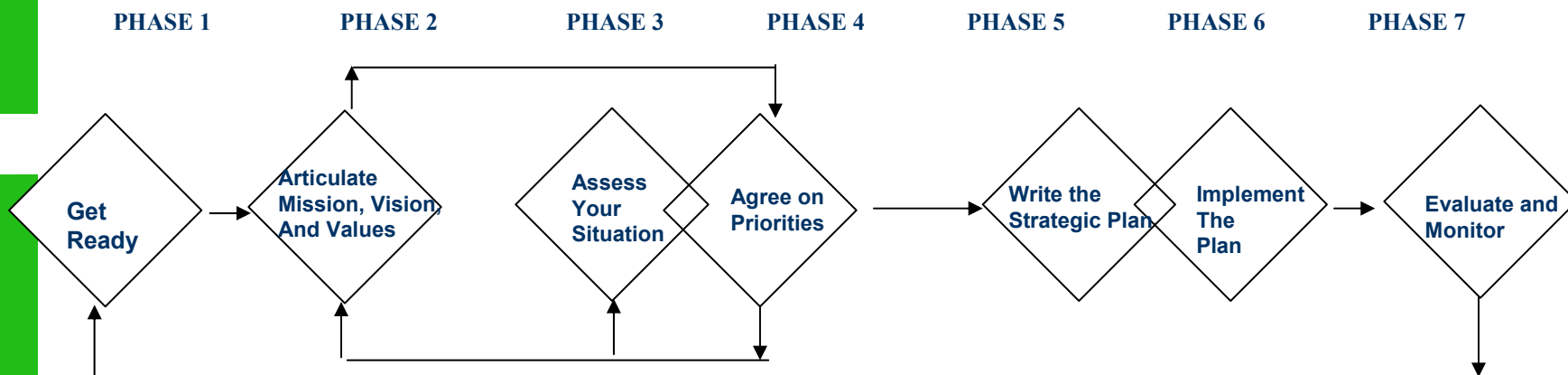
What Strategic Planning is Not

- A prediction for the future
- A smooth, predictable, linear process
- A substitute for judgment of leadership

Keys to Effective Planning

- Focus on the most important issues
- Be willing to question the status quo
- Produce a document
- Translate it into an annual operating plan

The Strategic Planning Process



Phase 1: Steps Phase 2: Steps Phase 3: Steps Phase 4: Steps Phase 5: Steps Phase 6: Steps Phase 7: Steps

PRODUCT:

PLANNING WORKPLAN	MISSION, VISION, AND VALUES STATEMENTS	DATA TO INFORM DECISIONS	DECISIONS	STRATEGIC PLAN	ANNUAL PLAN	BEST PRACTICES FOR FUTURE PLANNING & EFFECTIVE MECHANISMS FOR MONITORING
				<ul style="list-style-type: none"> Create goals and objectives Develop long range financial projections Write the Strategic plan Adopt the Strategic Plan 	<ul style="list-style-type: none"> Manage the Transition (The Changes Required for Success) Develop a detailed annual operating (implementation) plan for upcoming year 	

How long should our plan be?

- As short and simple as possible!
- Format that easily says what you intend to do and how
- Long enough to give guidance to annual operating plan
- Not so long that nobody will read or use it!

What to Include in Strategic Plan

Abbreviated	Moderate	Extensive
1-2 days	1-3 months	6 months or more
Mission, Vision, Values Summary of core strategies LT & ST priorities	+Intro by Pres. of Board Summary of : Environmental Assessment Client Surveys Stakeholder Interviews	+ Executive summary Organizational History & Profile Long-range budget projections
3-8 pages	8-12 pages	12-40 pages

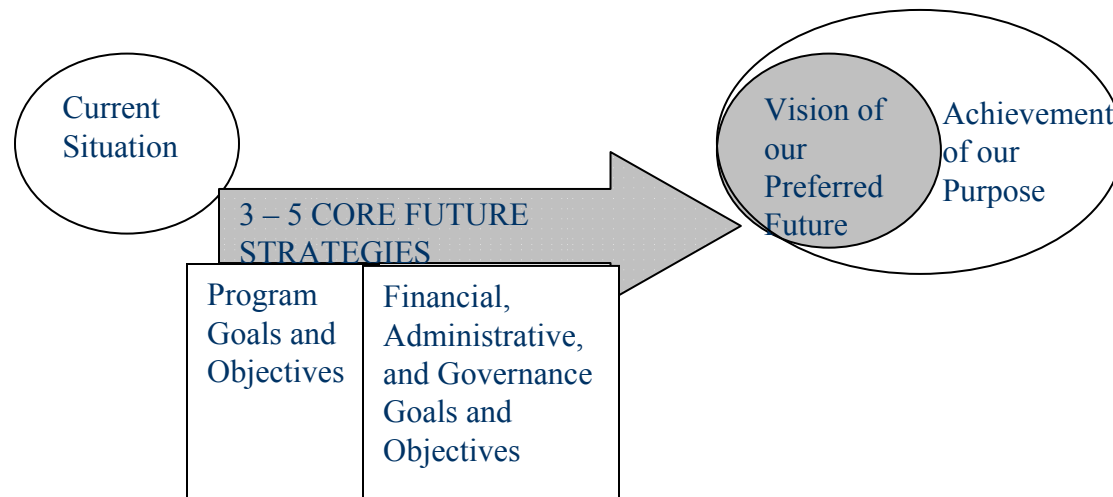
Program Goals & Objectives

- Plan of action for what organization intends to do over next few years to accomplish mission
- Useful guide for creating annual plan

Management/Operations Goals & Objectives

- What resources are needed to support the program goals?
 - Staffing levels
 - Resource Development
 - Board
 - Technology
 - Facilities
 - Other....

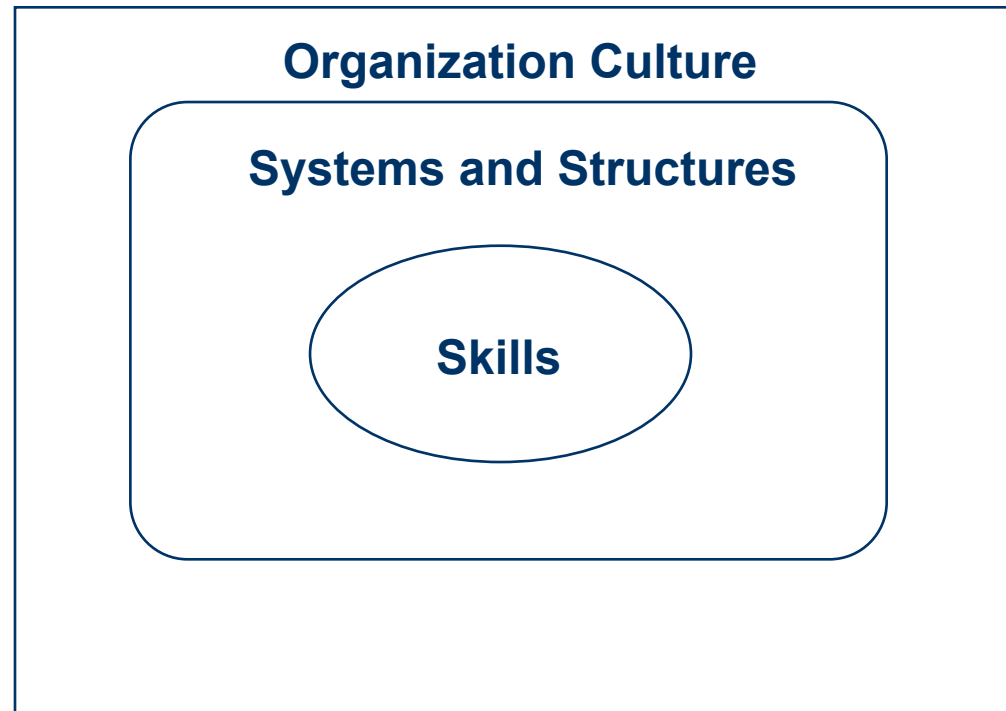
How does it all fit together?



PLANET 501C3 ≡ TALES FROM THE NONPROFIT GALAXY BY MIRIAM ENGELBERG



Levels of Change



Annual Implementation Plan

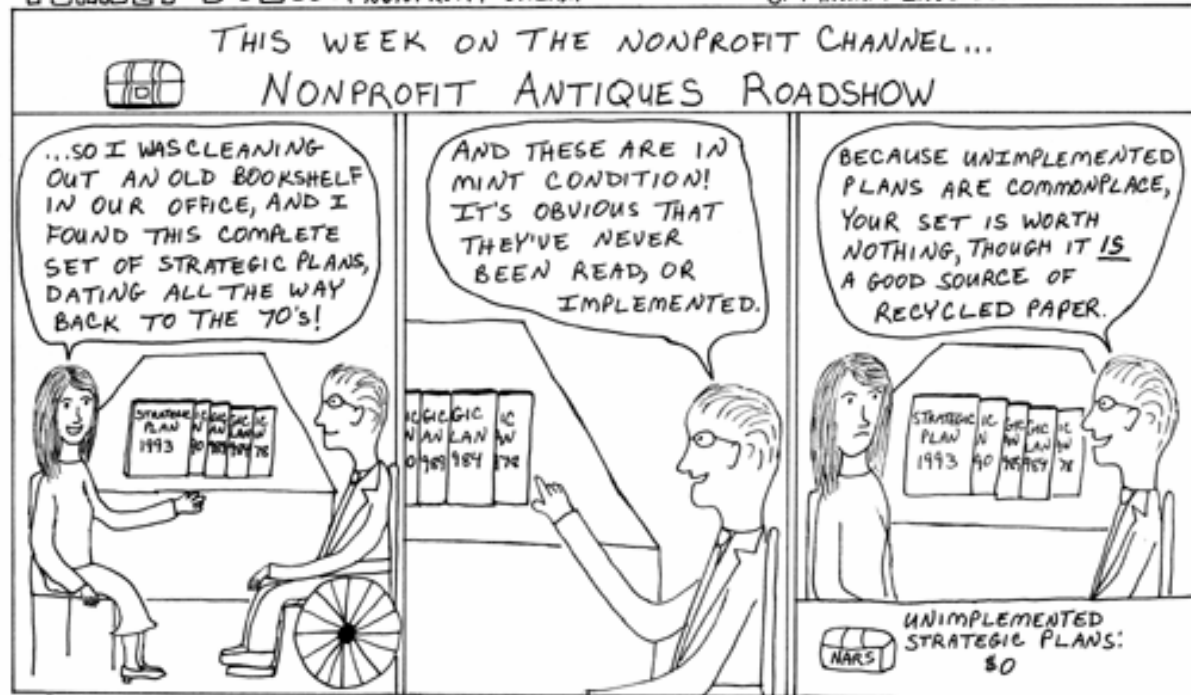
- Enough detail to guide the work
- Format that allows for reports on progress towards goals and objectives
- Shows consistency with overall priorities

Annual Implementation Plan

- Operationalizes strategic plan!
- Specifies process and outcome objectives
- Developed with staff responsible for area
- Format makes monitoring easy
- Has realistic budgets to support each area

PLANET 501c3 TALES FROM THE NONPROFIT GALAXY

BY MIRIAM ENGELBERG



© 5/30/02 COMPASSPOINT

WWW.PLANET501C3.ORG