

The Keys to Successful Strategic Planning

Nonprofit Networker

Dr. Helen Usera & Leah Bifulco

Rapid City, South Dakota



Why am I not surprised that this section is always the most disorganized?

Defining Strategic Planning

A strategic plan is a tool that provides guidance in fulfilling an organization's mission with maximum efficiency and impact.

If it is to be effective and useful, it should articulate specific goals and describe the action steps and resources needed to accomplish them.

As a rule, most strategic plans should be reviewed and revamped every three to five years.

Why Plan

- Focus on goals, objectives, and purpose.
- Provide accountability to organization and stakeholders.
- Provide a framework to identify resource requirements as well as gaps in resources.
- Provide a roadmap for linking programs, activities, staff, and budget.

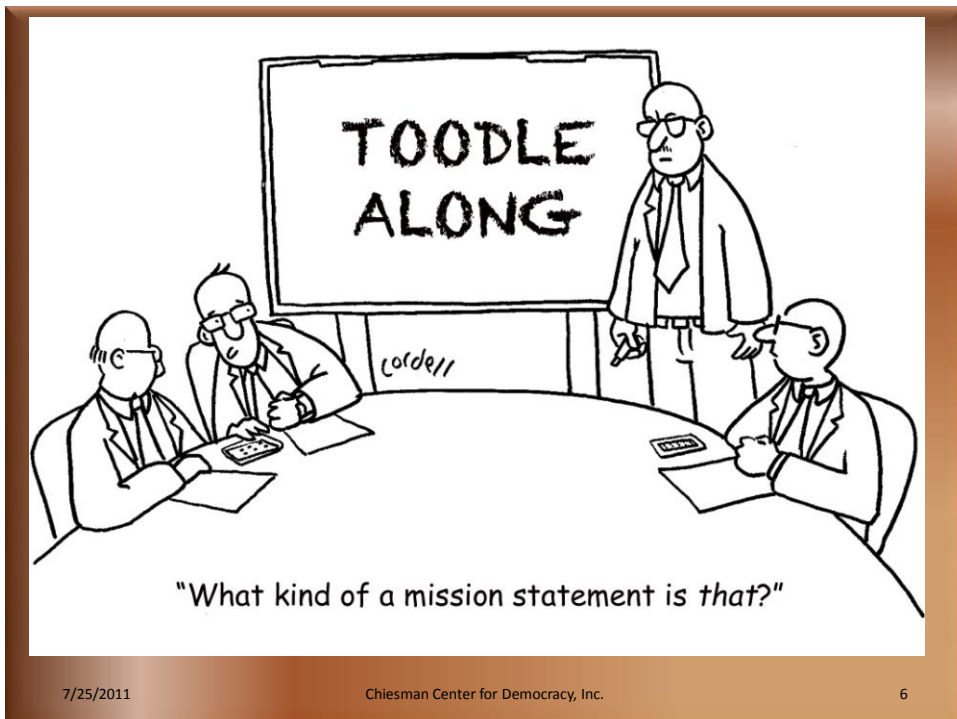
Key Components to Strategic Planning

- Vision, mission, and core values
- Organizational structure and context
- Current data, information, and analysis
- Preparation, planning, and communication
- Future vision, strategic initiatives, and strategic objectives
- Resources: human, physical, and fiscal
- Implementation and accountability

7/25/2011

Chiesman Center for Democracy, Inc.

5

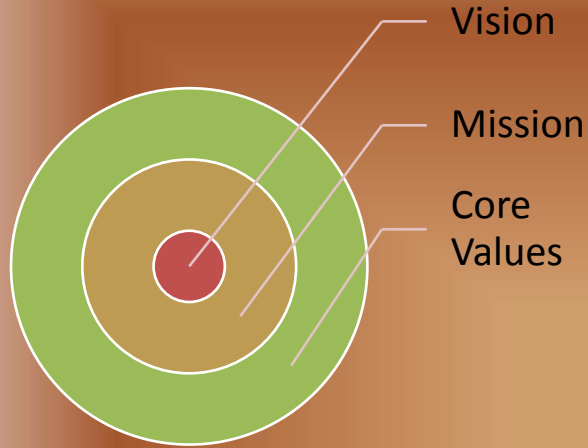


7/25/2011

Chiesman Center for Democracy, Inc.

6

Vision, Mission, and Core Values

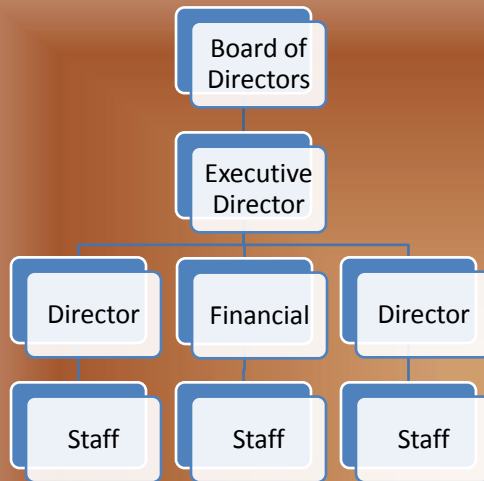


7/25/2011

Chiesman Center for Democracy, Inc.

7

Organizational Structure & Context



7/25/2011

Chiesman Center for Democracy, Inc.

8

Current data, information, and analysis

- What does your data say about you?
 - Program Evaluation
 - Staff Assessments and Evaluations
 - Community Needs Assessments
 - Program satisfaction surveys
 - Cost-benefit analysis
- What can you prove about your organization?

7/25/2011

Chiesman Center for Democracy, Inc.

9

Preparation, planning, and communication

- What information do you need to complete your strategic planning?
- What planning needs to be done? Who will be on the team to discuss the plan?
- Who will communicate the plan? Who will facilitate?

7/25/2011

Chiesman Center for Democracy, Inc.

10

Future vision, strategic initiatives, and strategic objectives

➤ Strategic objectives categories:

- Financial
- Marketing/sales
- Products/services
- Operations
- Human Resources
- Community
- Governance

➤ Quantify

➤ Challenging but attainable

Resources: Human, Physical, and Fiscal

- Who is going to be responsible for the implementation of the strategic objective?
- What technology or other resources are needed to achieve the objective?
- What fiscal resources are necessary to achieve the objective?

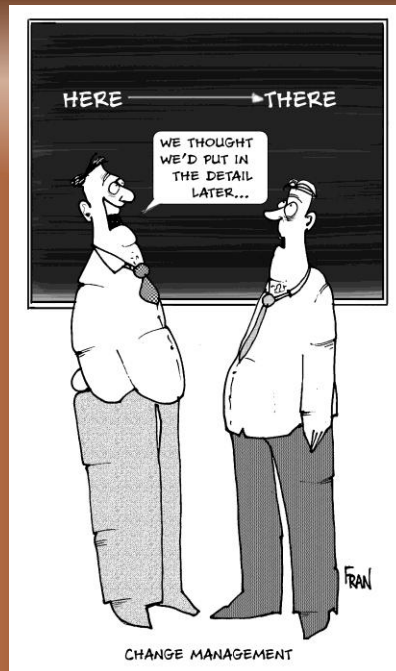
Implementation and Accountability

- How will the success of the strategic objectives be measured?
- What accounting measures need to be put into place?
 - Are the accounting system and controls adequate to provide reliable, accurate reports?
 - Are the reports distributed to the correct parties?

7/25/2011

Chiesman Center for Democracy, Inc.

13



7/25/2011

14

Resources

- TCC Group (2010). *Ten Keys to Successful Strategic Planning for Nonprofit and Foundation Leaders*.
<http://www.tccgrp.com/pubs/planning.php>.
- Usera, J. J. (2010). *Strategic planning workshop*. Rapid City, South Dakota: Chiesman Center for Democracy, Inc.