Objectives.

In today’s session, I’d like to show you:

1. Why strategic planning matters
2. What strategic planning actually means
3. How the definition leads to a framework
4. How to put the framework in practice
5. Common obstacles and how to deal with them
6. How to start the strategic planning process
Questions

If you have questions, type them in the comment box!

Our moderator will make sure you get answers!
A conversation with non-profit leaders.
Our View...

What non-profit leaders say when we have “the talk...”

• Blah, blah, blah... strategic planning

• Ummmm... *what* is it?

• Look, we can’t even plan out a day

• If we *could* do it, what’s the best approach?

• Well fine, but... you know... it’s... *us*!

• Ohhhh... I think I get it now! What next?
Why do we even have the discussion?

Consultants... why must they endlessly babble about strategic planning?
"Just... Stop!"

Yes, strategic planning *is* important!

Here are a few reasons why:

- Relevance
- Sustainability
- Expansion
- Coordination
- Decision-making
- Fundraising
- Engagement

Consultants... Why must they endlessly babble about strategic planning?
Are we playing on the same field?
Okay, strategic planning matters. But what does it *mean*?

What we ask this, we often hear:

- A lot of uncertainty
- Half-answers
- Different visions
- Stock approaches
- Inconsistent, and not always good!

This must change! We need a common, sound understanding to get it right.
Let’s find some common ground.
How to Agree?

We must deconstruct the relevant terms!

Strategic Planning = ???
Wrong elements = Bad process
So, we need a *great* definition!

How? We start from the top.
What is strategy? What *isn’t* it?

A lot of different things come to mind when I hear the words “strategic planning...”
The Basics.

Time to build something!

- Longer-term
- Big Picture
- Logical
- Actionable
- Flexible
| Longer-term | On-going challenges vs. “Radar blips”  
Evolving “market” vs. Static conditions  
Planned, sustainable vs. “Knee-jerk,” one-time |
|------------|--------------------------------------------------|
| Big Picture | Vision, mission, and value consistency  
Aligned, integrated goals, objectives, strategies  
Program and resource impacts and tradeoffs |
| Logical    | Starting with end vision of planning period  
Known start point, sequenced road map  
Risks, impacts, mitigations, and tolerance |
| Action-oriented | Realistic resourcing under given conditions  
Project planning and program management  
Metrics, targets, and milestone monitoring |
| Flexible   | Scenario modeling and contingency planning  
Continuous, active leadership engagement  
Recognition, evaluation, and course correction |
### Longer-term
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Almost There…

**Longer-term**
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Questions?

Everything make sense so far?

Type your questions in the comment box!
So...where does all of this lead?
Now What?

We’ve defined the key elements of “strategic planning.”

Okay...What was the point of going through all of that?

Well, we needed a great definition if we’re going to do this thing right!
Looking ahead at the population’s needs
Understanding and assessing our surroundings

Defining focus in context of the mission
Determining how to serve, deliver, and sustain
Finding a realistic path to reach the end state

Developing and executing plans to “get it done”
Coordinating, facilitating, and managing work
Tracking progress and measuring outcomes

Identifying issues and external changes
Adapting plans to stay relevant and effective
Looking ahead at the population’s needs
Understanding and assessing our surroundings

Defining focus in context of the mission
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Or, to Simplify...

Anticipate
- Survey
- Project

Plan
- Focus
- Envision
- Resource
- Refine

Act
- Build
- Program
- Manage
- Measure

Adapt
- Analyze
- Respond
We’ve now got a framework, built on a sound definition.

Logic produced a process to help us “do strategy right.”

Okay, *I* think it’s pretty cool how we went from a definition to a framework.
Still following everything?

Type your questions in the comment box!
Time to go deeper, into the details.
How do we put our framework into practice?

Remember:

Our Success =

Relevance
Direction
Execution
Outcomes
Sustainability
Anticipation.

Exploring the “market”

• What we’re looking for:
  - Demographics and trends
  - Population demands
  - Client characteristics
  - Other service providers
  - Impacts of environment

• How we’ll find what we need:
  - Publicly available data
  - Client and/or public input
  - Subject matter experts (SMEs)
  - Front-line observations
  - Modeling, including scenarios
Planning.

Envisioning and mapping

• What we’re trying to do:
  - Focus on our “sweet spot”
  - Articulate long-term aspirations
  - Set targets and milestones
  - Ideate and formulate a plan
  - Make sure it’s feasible to achieve

• How we’ll go about it:
  - Board and key staff interviews
  - Facilitated planning sessions
  - Sequencing and scheduling
  - Resource allocation and gap analysis
  - Evaluation and refinement
The planning process has to be iterative…

... to create a realistic, actionable Strategic Plan.
Making things happen

• What needs to happen:
  - Laying out the details
  - Coordinating and facilitating
  - Executing the activities
  - Managing schedules and issues
  - Measuring and reporting outcomes

• What needs to be in place:
  - Knowledgeable “owners”
  - Empowered Program Manager
  - Project management tools
  - Collaboration mechanisms
  - Program dashboard
Adaptation.

Ensuring relevant outcomes

• What adaptation involves:
  - Risk and outcome analysis
  - Issue recognition and responsiveness
  - Attention to conditions and impacts
  - Priority contingency planning
  - Willingness to change course

• Elements of flexibility:
  - Engaged Board of Directors
  - Open lines of communication
  - Commitment to success
  - Regular, periodic strategy reviews
  - Comprehensive impact decisions
Questions

That’s a lot to digest. Need clarifications?

Type your questions in the comment box!
Some challenges and solutions.
## “What if We…”

<table>
<thead>
<tr>
<th>Common Issues</th>
<th>Possible Solutions</th>
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</table>
| Aren’t confident about doing this?         | • Use today’s discussion as a platform  
• Get external help to guide you          |
| Can’t find money to get help?              | • Make it a top priority – there’s ROI  
• Apply for Strategic Planning grants    |
| Are uncertain where we should go?          | • Start collecting data, right now  
• Talk to people – staff, clients, etc.! |
| Don’t have the capacity for action?        | • Look at Board composition and rules  
• Be creative sourcing outside help      |
| Are concerned about follow-through?        | • Manage the plan like a program  
• Use all of your accountability tools   |
| Need to know show progress?                | • Identify appropriate metrics  
• Set realistic key milestone targets    |
| Get “overcome by events?”                  | • Define broad, purpose-aligned goals  
• Predict, model, assess, and respond    |
Want to know how to get started?
Five Things to Do.

Here’s what you need to do:

Educate your Board
Show them why and how

Agree on the purpose
How will we use our plan?

Get commitment
Secure key Board members

Find some money
You have it, or you can get it

Hire a qualified guide
Look beyond just a facilitator
What to take away from today.
Key Takeaways.

Here’s the basics I hope you learned:

• Strategic planning matters to every non-profit, but people think about it a million different ways.

• Sound strategic planning is long-term, big picture, logical, and action-oriented, resulting in a flexible program.

• To reach “full potential”—non-profits need to follow where the definition goes: Anticipate, Plan, Act, and Adapt.

• It’s tempting to use a less rigorous approach, but it won’t lead you to sustainability, let alone growth.

• It may seem complex—expensive, even—but everyone can and should engage in strategic planning the right way.
Questions

That’s all. Last chance... ask away!

Type your questions in the comment box!

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About Us.

Snowflake LLC

We are a Certified B Corporation®.

Our purpose is to help organizations improve individuals’ and communities’ quality of life. Since our 2014 launch, we’ve collaborated with more than 30 great clients to do greater things, for the greater good.

Strategy + Organizations + People + Marketing

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