



PEGGY M. JACKSON, DPA, CPCU

DESIGNING AN EFFECTIVE STRATEGIC PLAN

The Strategic Planning Committee

Like any good team, your nonprofit's strategic planning committee needs to have the right players. Who are the people who would be good strategic planners in your nonprofit? Strategic planning committees need to be staffed by the nonprofit's "star" players who have exhibited a dedication to teamwork, meeting deadlines and focusing their energies on deliverables.

The Strategic Planning Process

The process brings together a team of important players within the nonprofit to examine where the organization is now, what it has to work with and where it is going – and why. It is a rational, grounded exercise that captures the essence of where the organization has been, where it is now and what its future will look like. Effective strategic planning ***NEVER*** engages in magical thinking, nor does it develop plans without taking into consideration the resources necessary to carry out the plans as well as a plan for obtaining the necessary resources.

The Elements of a Strategic Plan

Organizational Profile

The organizational profile presents an overview of the current operations, statistics and other facts related to the history of the nonprofit. A SWOT exercise identifies a nonprofit's strengths, weaknesses, opportunities and threats. The exercise should be timed in that the discussion for each of these areas should be limited to, perhaps twenty (20) minutes or less. All ideas should be accepted at least for the first round. Because the results will be viewed at regular intervals during the planning process, there will be opportunities to refine the results. Remember, the SWOT analysis has a beginning, middle and an end. If the planners become stuck in an endless SWOT analysis, there will be little progress in writing a plan.

Description of the Nonprofit's Operational Vision

The purpose of an operational vision is to help a nonprofit reflect on its future in terms of a) what it wants to become or to dramatically change and b) how these goals can be achieved within a specific timeline. An important guideline about operational vision is "***No pie in the***

sky allowed!” Visions for the future are real, measurable, make sense for the organization’s structure and contain the type of metrics (measures of success) that lend themselves to rigorous analysis. Strategic planning is a disciplined, organized way of describing your nonprofit’s current operational, strategic and competitive position for the purposes of planning where it wants to go and *how it will get there*. ***Where does the nonprofit want to go? What resources does the nonprofit already have? What additional resources are required to move to the next level?***

Strategic Goals

Having a strategic plan does not give the nonprofit license to plan without ever intending to execute! The document is not intended to be a wish list for the review and approval by the cosmos, nor is it a wish list for the nonprofit’s larger donors. Strategic goals must be specific and be accompanied the by objectives and strategies necessary to achieve the goals.

Resources Needed

The Strategic Plan needs to clearly identify ***all*** of the resources needed to execute the plan. This means, money, additional staff, commercial real estate, equipment and any other materials or processes needed for success.

Action Plan and Timeline, Deliverables and Accountabilities

Strategic plans can be designed in a very timely fashion, and executed in an equally timely fashion. The secret is to be clear in terms of deliverables and accountability. If an individual is assigned to be the lead in a component of the execution of the plan, ***failure is not an option***. People who don't produce ***must be replaced***.

The Strategic Plan should render a vision for the future based on the goals, objectives and strategies outlined in the plan, a clearly defined and articulate path to getting to the next level and a list of resources that will be necessary to go to the next level. Each of the deliverables should clearly contribute to a corresponding strategy which achieves a specific objective which contributes to the achievement of a goal.