

Strategic Planning for Nonprofits

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Roles of Boards: Hanlon Model

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- **Provide continuity for the organization**
- **Select and appoint a chief executive**
- **Govern the organization by broad policies and objectives**
- **Acquire sufficient resources for organization's operations**
- **Account to the stockholders (or public) for the products and services of the organization and expenditures**

Roles of Boards: BoardSource

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- 1. Determine the Organization's mission**
- 2. Select the Executive**
- 3. Support the Executive & Review Performance**
- 4. Ensure Effective Organizational Planning**
- 5. Ensure Adequate Resources**
- 6. Manage Resources Effectively**
- 7. Determine and Monitor Products & Services**
- 8. Enhance the Organization's Public Image**
- 9. Serve as a Court of Appeal**
- 10. Assess Its Own Performance**

Food for Thought

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“All too often, on the long road up, young leaders become servants of what is rather than shapers of what might be.”

— **John Gardner**

Strategic Planning Defined

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Strategic Planning is a systematic, inclusive leadership and management process that results in a high-level framework for shaping the future of the organization. This framework serves as the basis for operational planning, aligning resources, making decisions and evaluating progress.

Benefits

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- ❖ **Develops and documents a shared understanding for the current situation and position of the organization.**
- ❖ **Engages key decision makers in charting strategic direction**
- ❖ **Strengthens congruence and relationships among planning team**
- ❖ **Pinpoints priorities and targets for change**
- ❖ **Focuses resources on change and priorities; distinguishes between the “vital few” and the “trivial many.”**
- ❖ **Provides tool for communicating with external and internal stakeholders**
- ❖ **Serves as basis for monitoring and reporting progress and making mid-course corrections.**

The Process

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- ❖ **Planning to Plan**
- ❖ **Completing Environmental Scan, Situation Audit, Data Gathering**
- ❖ **Exploring Possibilities**
- ❖ **Affirming Mission, Vision & Guiding Principles**
- ❖ **Generating Strategy and Priorities**
- ❖ **Engaging Teams in Action Planning**
- ❖ **Completing and Communicating the Plan Document**
- ❖ **Establishing Monitoring and Reporting Mechanisms**

Critical Elements

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- ❖ **Full support of key board and staff**
- ❖ **Involvement of key internal and external stakeholders**
- ❖ **Focus on big picture**
- ❖ **Commitment to candor about current realities and changing external and internal forces**
- ❖ **Openness to change**
- ❖ **Reasonableness of goals and timelines**
- ❖ **Commitment to implementation and results**
- ❖ **Commitment to strong follow through and accountability**

Roles of Directors in Strategic Planning

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- 1. Understand the Current Context**
- 2. Understand the Current Business Model and Results**
- 3. Stay current on emerging competition, challenges and trends**
- 4. Contribute to exploring possibilities and crafting strategy**
- 5. Establish accountability and monitor results**
- 6. Advise regarding mid-course corrections**
- 7. Revisit strategic regularly**

Tips for being “shapers of what might be”

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- **Set adequate time aside to discuss the big picture**
- **Ask good questions**
- **Explore possibilities and ideas**
- **Report Strategic progress at board meetings**
- **Discuss one strategic issue or best practice at each board meeting**
- **Distribute reading about strategic issues or best practices in advance of board meetings and planning sessions**

Summary and Conclusion

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- Summary
- Questions and Answers
- Adjourn