



Strategic Planning

A Catalyst for Your
Organization's Success

January 17, 2008

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Agenda

- What is a strategic plan?
- Why does my nonprofit need a strategic plan?
- How does my organization create a strategic plan?
- How do we get started?

What is a strategic plan?

- A management tool that helps the organization do a better job
- Outlines a vision for the organization, and overarching strategies to accomplish that vision
- Provides short and long term goals and metrics by which to measure progress against those goals



Elements of a strategic plan

- Mission and Vision
- Metrics for Measuring Progress
- Overarching Strategies
- Three-Five Year Targets
- First Year Goals
- Tactics
- Budget
- Accountabilities

A strategic plan is ...

- Driven by the Board of Directors
- Created for three to five years out
- Focuses on matters of strategic importance
- Written down and shared publicly
- Reviewed regularly

A strategic plan is not...

- A business plan
- A marketing plan
- An action plan
- A long-term vision or plan
- Developed in a vacuum

Why does my nonprofit need a strategic plan?

- Organizational roadmap
- Guide for decision-making
- Chance to “take stock” in the organization and its environment
- Keeps everyone on the same page
- A tool to inform, motivate, and involve others (funders, partners, community)

How does my organization create a strategic plan?



Environmental Scan

- Allows your organization to “take the temperature” of the environment it works in
- Provides insight and context for the Board of Directors as they set vision for the next several years
- Data is reviewed prior to setting the vision and strategy

Environmental Scan

- Could include:
 - Interviews and/or focus groups with key constituents
 - Surveys of board, staff, consumers, funders, partners
 - Trends research and analysis, both internally and externally
 - Document reviews

Strategy Formulation

- Affirm the mission – ensure that the mission is in fact the appropriate one and that everyone understands and believes in it
- Determine the vision: *What do we want to reasonably accomplish in a specific period of time?* This is the vision for the organization over the next three years.

Strategy Formulation

- Identify what stands in the way of achieving the vision.
- Determine overarching strategies for overcoming those constraints – *What do we need to do to move us toward that vision?*

Goal Setting

- Determine what the organization wants to accomplish in each strategy area in the next three years
- Determine the approach to accomplish each goal
- Identify one-year targets – *Where will the organization be in one year?*

Metrics and Action Planning

- Identify metrics - *How will the organization measure progress toward the goals?*
- Assign accountabilities – *Who is accountable for what?*

Budget Forecasting

- Determine resources necessary to accomplish each goal
- Create a budget that forecasts necessary resources, and identify the sources of those resources.

Roll-out

- Launch the plan with a celebration!
Engage all individuals that were involved in the formation of the plan.
- Share the plan with funders, partners, and key constituents. Ask for their thoughts and for their support of your direction.

How does my organization get started on a strategic plan?

- Take stock of what you have.
- Determine how extensive of a process you need.
- Consider bringing in a facilitator to assist your organization in the planning process.

What can Dewey & Kaye do for you?

- Organizational assessment
- Environmental scan
- Research
- Facilitation
- Full strategic planning process



Thank You!

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