

MARKETING GUIDE

Expect More from Your Strategic Plan

Impact, Not Operations



MISSION MINDED

AMPLIFY THE GOOD

INTRODUCTION

5 Questions to Consider for a More Powerful Strategic Plan.

The world has changed, so must how you lead.

The first quarter of the 21st century has shined a brighter light on what is required of mission-driven organizations. Global warming is depleting our natural resources, a pandemic brought the world to its knees, social unrest and activism have exposed centuries of inequities, and political divisiveness has led to legislative gridlock in our nation's capital.

Our world, our country, and our communities need something different from nonprofit leaders and educators today.

Your work has never been more essential. And now is the time to elevate your strategic plan so that it does more than move you incrementally forward, and instead transcends expected operational outcomes.

Your next plan can and should catapult your organization to its next level of greatness. It must include not a list of things you'll do, but a bold vision that truly amplifies your intended impact and advances your mission. When your community of stakeholders understands the **'why'** behind your vision, they'll stop at nothing to help you achieve extraordinary results. Approaching your plan this way takes no more work, and leaves you with a magnetic strategic plan that inspires your entire community to embrace and fight for it.

Mission Minded helps leaders across the country develop **strategic plans that are unapologetically bold**. Whether you lead a nonprofit, foundation, or school, avoid the five common pitfalls we've outlined below to create a strategic plan that breaks the mold, skirts the expected, and truly inspires your community around the shared vision you'll create together.

1 Is our strategic plan missing the “Why”?

Nonprofit and school leaders often mix up running daily operations with making a real mission impact. And yet, it’s the impact that makes a strategic plan truly strategic. Too many nonprofit and school plans look the same, divided into common functional areas like programs, facilities, finance, community, and staff development. **They end up as expensive to-do lists missing the mission driven WHY behind them.** These plans often gather dust because they lack urgency and vision. They fail to inspire leaders and stakeholders to fully embrace and drive the work forward.

Case Study: Bay Area Discovery Museum

Bay Area Discovery Museum is a mission-driven museum, beloved for creating a world of wonder for children and families to explore. Covid had hit them—and all member organizations—hard. They wanted a strategic plan to guide them to a new “normal.” Because Mission Minded’s methodology emphasizes the actual impact the organization exists to bring about—or the WHY—rather than simply the operational business of achieving their mission, Bay Area Discovery Museum recognized a greater strategic imperative than hitting reset.

So they set a **bold vision to address the inequities that limit access to educational enrichment among systematically oppressed communities.** Together, we co-created a bold and inclusive vision and plan that swung the doors of the museum open to the entire Bay Area population, both literally and figuratively. The commitments we helped them craft as part of their plan powerfully guide them to be an inspiring early childhood education partner—one that addresses the needs facing families with young children, extends joyful play experiences into schools, and builds a child-centric community that nurtures future generations.



They could have created an expected plan that outlined 3-5 goals like expanding fundraising, updating the campus, and increasing accessibility. But their leaders were audacious enough to elevate their plan from the expected into one focused on the commitments they’ll make to create the world they want to see.

[See the case study.](#)

2 Are we asking the wrong questions?

Engaging your organization's community in strategic planning is essential. The more you involve your stakeholders, the more they'll support your vision. But asking the wrong questions, like "What should we put in our strategic plan?" leads to narrow ideas like "improve our buildings" or "recruit more members/students/volunteers". **Instead, focus on the bigger questions like "What does the world need from our organization or school?"** These are the types of questions that help move your plan from expected to elevated.

Case Study: Sterne School

Sterne School, a 4-12 independent school serving—to use their words—"students with mild to moderate learning disabilities," acquired a new building and wanted a strategic plan to help them envision their program in the new space.

Mission Minded's community engagement was designed to inspire stakeholders—so we asked questions that helped them to imagine the world they hoped Sterne would bring about—vs. what Sterne itself would become. That led to this school—a community stigmatized by society for being "different"—to adopt one of the boldest vision statements we've had the privilege of co-creating: **We envision a world where every person has a learning profile.**

And that set the stage for equally bold commitments to cement Sterne's reputation as a west coast thought leader for neurodiverse education, and one that empowers educators near and far with curriculum and training to teach to the strengths of all learning profiles.



Naturally, this plan first came to life in their new building, but almost equally important, it inspired their entire community to understand the role their school can and must play in bringing about societal change. A plan like this helps Sterne do more than operate efficiently. It helps them attract faculty, staff, students, and donors because of its boldness and clarity.

3 Are we inviting different perspectives?

Too many organizations try to save time and money by making strategic planning a top-down effort. Senior leaders set the tone, maybe even drafting the plan during a single Saturday retreat and make all the decisions.

But high-impact strategic plans need input from your entire stakeholder community.

We're not saying that you need to make the strategic planning fully democratic—your board and leadership should be the ultimate decision makers—but if you don't involve your community at crucial points throughout the process, they'll feel disconnected and unmotivated to help you achieve the goals set out in your plan. Not only that, you'll miss critical perspectives needed to make the plan as strong as it can be.

Case Study: Mount Tamalpais School

Mount Tamalpais School was founded with the belief that elementary education should not be something a student passively receives—learning should be a shared and active responsibility of the teacher and the student.

After the 2020 pandemic, the school was primed to catapult to its next level of greatness and needed an inspiring strategic framework. Because Mission Minded's strategic planning engagements are wholeheartedly inclusive, we engaged the entire school community in conversations about what's been learned in the 21st century—especially during recent years—and how we might broaden Mt. Tam's definition of a learned person—**from one who is an "active learner" to one who knows how to put what they learn into action.**

In order that every graduate emerge with the skills they need to positively impact their communities and their world, the Mount Tamalpais School community committed to a comprehensive framework—the "Mount Tamalpais School Habits of Excellence"—to guide their program, professional development, facilities, and community in bringing these habits to life in every student.



This student-centered plan helps Mt. Tam differentiate itself and attract mission-fit families who share the plan's values.

Equally exciting is that this plan then set the tone for a successful capital and endowment campaign that made clear sense to a community already ignited by the future vision of the school. Win. Win. Win.

[See the strategic plan.](#)

4 Are we missing the connection between our brand strategy and our strategic plan?

Almost every nonprofit strategic plan we've seen includes an expected goal to strengthen the organization's brand, and for good reason—the strategic plan sets a bold new direction, and the brand strategy builds the reputation you need to get there. So, if these are so linked, why do organizations often tackle them one after the other instead of together?

To save time and resources, we recommend doing both the strategic planning and brand strategy work at the same time. It maximizes momentum and efficiency, doubling the impact of the stakeholders involved, and you'll emerge with a strategic plan and brand strategy that strengthen each other, and your organization.

Case Study: We Don't Waste

We Don't Waste is one of the largest food recovery organizations in Colorado, helping feed people while working to protect the planet by keeping food out of landfills. Despite their good work, hunger and pollution is at an all-time high.

Since their founding they had grown and shifted into something bolder and broader—yet undefined. So we partnered with We Don't Waste team to articulate what they really wanted to do into an inspiring vision for their future: **expand our impact to ensure the health and sustainability of our communities and our planet.** And because strategic planning and brand strategy are inextricably linked, we also developed a tightly integrated brand strategy that sought to shift perceptions of We Don't Waste from a logistics operation to a collaborative partner addressing the big, intractable problems of food insecurity and food waste.



The resulting five-year strategic plan and brand messages utilize their brand values as a framework to guide the organization's evolution and communication strategy. See the case study for inspiration on how your organization's brand and strategic plan can work together for more cohesion and impact.

[See the case study.](#)

6 What Does It Cost and How Long Will It Take?

If you partner with Mission Minded, plan to spend 7–12 months on the development of your strategic plan. We deeply customize each partnership so use this as a guide and call on us to discuss your needs and budget.

Strategic Planning: \$75,000–\$100,000

Includes:

- *Kickoff sessions for Steering Committee and Board of Directors*
- *Qualitative, quantitative, and secondary research culminating in an affirmed situation analysis*
- *Three full-day, large group work sessions to finalize different parts of the strategic plan*
 - *Up to two days of on-site community sessions (recommended for schools only)*
- *Up to five individual meetings with steering committee*
- *Final strategic plan document that contains, vision, mission, values, strategic commitments, and strategic priorities*
- *Session with leadership team on how to implement strategic plan*
- *Bi-weekly check-ins with Core Team (a group of up to 5 key decision makers)*

Strategic Planning + Brand Strategy: \$95,000–\$130,000

Includes the strategic planning activities, plus:

- *Brand research findings*
- *Full-day, large group brand strategy work session*
- *Affirmed brand strategy including brand positioning, personality, and experience*
- *90-minute BrandActivation™ session*

Strategic Planning + Brand Strategy + Key Messages: \$120,000–\$155,000

Includes the strategic plan and brand activities, plus:

- *Half-day, large group messaging work session*
- *Affirmed key messages including Belief Message, Problem Messages, Opportunity Messages, and Detail Messages*

How do you know if you're ready to plan?

If you're not sure your organization is ready to embark on strategic planning, consider conducting a pre-strategic planning retreat with your Board to ensure they are ready to embark on the work ahead, and to lay the groundwork for a successful engagement.

Pre-Strategic Planning Retreat for Boards: \$15,000–\$20,000

Includes:

- *One prep meeting*
- *Full-day Board work session*
- *Summary report*

Learn More

Mission Minded is a strategy and creative firm that helps good causes have greater impact.

We believe the organizations that make our world better need to be unapologetically bold about what makes them unique. So we partner with nonprofits, foundations, and schools to raise more money and attract more people to their work with the urgency their mission demands.

Together, we can make sure that your organization is understood and appreciated by the people you need most.

To find out how Mission Minded can help your organization, call us today at **415-990-9360** or visit **Mission-Minded.com**.