

MARKETING GUIDE

Ready to Plan?

A 5-Phase Framework for Inspired Nonprofit Strategic Planning

INTRODUCTION

A strategic plan provides a nonprofit and its stakeholders with a clear and simple picture of where the organization is, where it is going, how it'll get there, and yet there are numerous complex methodologies out there designed to get to the same outcome. At Mission Minded we like to say that there is no one-size-fits-all solution to [strategic planning](#), but there *are* five fundamental steps you can and should take to get the visionary plan your organization deserves.

Strategic planning can also be a heavy lift for nonprofit leaders and their communities. When done well, many voices are included, and no stone is left unturned. And while hiring a third-party consultant can bring structure and objectivity to strategic planning, the cost to do so may not always be possible.

So, we developed this guide to help you lead your nonprofit community through a strategic planning process and launch a plan that will inspire, focus, and align your stakeholders—and your work—for years to come.

Here are the five phases for inspired strategic planning.

1 PLAN Phase

Ask yourself, “What are the goals for the PROJECT and what are the goals for your PLAN?” and design a methodology that will achieve both.

Before embarking on planning, assemble a small working group to determine the following guard-rails for this work:

- Time: The life of the project can range between six and 18-months and the life of the plan can range between three and 10-years.
- People: Community engagement can look like anything from a lean, decisive, swift working group to a highly inclusive community-wide initiative guided by a steering committee.
- Data Collection: In addition to studying secondary research (reports and studies by government agencies, trade associations, or other organizations within your sector), you can collect primary research yourself using a variety of techniques including observations, interviews, questionnaires, and group discussions and exercises.
- Roles and Responsibilities: Whether you employ a small working group or a larger steering committee to guide plan development, it is incumbent on your Board to ratify your strategic plan and the responsibility of staff to implement it.

After arriving at decisions on all of the above and communicating the goals of the initiative and plan to your broad community, you're ready to get to work! *PLAN phase should take approximately two months.*

2 SCAN Phase

Study your organization, the environment, and climate in which it exists, and synthesize those findings with the goal of apprising your Board on the state of the organization.

There is a lot of jargon involved with strategic planning and you're about to be introduced to the first of many terms: the **situation analysis** (see the jargon exchange sidebar on the following page for definition). The goal of the SCAN phase is to provide your organization's Board with all of the contextual information they'll need to evaluate the suitability and viability of their future strategic plan, and this is done in the form of a situation analysis. And the decisions you made during your PLAN phase—about people and data collection—will determine the scope and sequence of your methodology.

For example, if you elected to tap a lean working group and utilize observations and interviews for data collection, this phase can be completed quickly. Conversely if you decided on broad community participation and utilizing surveys & questionnaires for data collection, you'll need more time. Whichever way you go, your goal is to present your Board with a high-level assessment of your organization that will set the stage for decisions they need to make about your organization's future and the work ahead.

It is incumbent on your Board to ratify your strategic plan and the responsibility of staff to implement it.

A useful method for collecting and organizing **primary research** before you begin writing your situation analysis is a **SWOT analysis** (see sidebar) and there are a number of ways to build yours. The simplest is to gather your Board, staff, and other stakeholders together or separately and ask them to list as many **s**trengths, **w**eaknesses, **o**pportunities, and **t**hreats as they can—use their input to build your SWOT.

To deepen your understanding of your internal strengths and weaknesses you may also elect to design and field an online survey among your organization's stakeholders, inquiring about their satisfaction with a myriad of your organization's programs and practices (for example: administration and staff, program, culture, communication, fundraising, etc.). The results of that survey will serve to validate (or invalidate) the perceived strengths and weaknesses your stakeholders contributed during the aforementioned SWOT exercises.

To go even *further* in understanding of any perceived strengths and weaknesses you may also elect to conduct one-on-one interviews among some of your organization's **mission critical stakeholders** (see sidebar) to explicitly probe issues of opportunity and concern.

SCAN phase jargon exchange

Steering Committee: A group of people formed to oversee and support the project, selected based on their stake in the organization, and representing a variety of stakeholders from throughout the organization.

Situation analysis: This is the process of critically evaluating the internal and external conditions that affect your organization so that you can identify opportunities you can seize and challenges you face.

SWOT analysis: A categorizing tool to help organizations name their Strengths, Weaknesses, Opportunities, and Threats, with the “S” and “W” being internally focused and the “O” and “T” being externally focused.

Primary research: Research about your own organization and related issues that is self-conducted, -compiled, -gathered, and -organized.

Secondary research: Research that is compiled, gathered, organized and published by others, that provides additional insights into the concerns of your organization.

Mission critical stakeholders: The people without whom your organization cannot meet its goals (think select Trustees, donors, staff, and clients/members/parents).

Finally, to inform and enrich your understanding of your external opportunities and threats, we recommend that members of your volunteer group or steering committee conduct **secondary research** (see sidebar) about a host of external topics that surfaced in your SWOT exercise, studying issues that may or will directly affect your organization, such as (but not limited to):

- changing demographics and market segments
- political, social, and economic climate
- industry trends and innovations
- competitive analysis

Congratulations, you’ve got everything you need for a comprehensive situation analysis that should absolutely NOT be written by committee, but rather by the excellent writer and saint you cleverly recruited to your working group or steering committee. Blending all of the learning detailed above, use this helpful outline for your situation analysis:

- I. The (Organization Name) Program
- II. The Community (Organization Name) Serves
- III. The Competitive Arena
- IV. The Climate or Contextual Environment in Which (Organization Name) Exists
- V. Conclusions & Implications

Share your final, CONFIDENTIAL situation analysis with the Board at this juncture, and before advancing to the next phase of work, and ask them to read, reflect, and share their questions with the committee. *SCAN phase should take approximately three months.*

“Vision is what the world will look like after you’ve finished changing it.”

3 ENVISION Phase

Put the past and present behind you, now is the time to look toward the future.

There is plenty of jargon in this phase including the often confused “vision” and “mission” so be sure to reference the jargon exchange (on the next page) before digging into this work.

Envisioning your organization’s future starts with envisioning the world in which you want it to exist. When you can see *that* world clearly in your mind’s eye, express it as a given; something that’s been achieved. Your **vision statement** should describe the world *after* you’ve finished changing it, not before. The quickest way to an inspiring, future-focused vision concept is to prompt community members to finish sentences like these during group exercises: “we would move mountains in order to _____” and “our organization is here so that _____.” Assuming your stakeholders are on the same page about your organization’s *raison d’etre*, bring in the writers to express the idea boldly and succinctly, like the examples below, none of which—you’ll notice—mention the organization:

- San Francisco AIDS Foundation: AIDS ends here
- Sterne School: Every person has a learning profile
- Partnership to End Domestic Violence: A California free from domestic violence
- Amherst College: A just world for people of all genders

Now you’re ready to map your organization’s work to your vision. If your vision is a world that looks like “X,” what does your organization need to do to make that happen? The answer to this question is in your **mission statement**, and the best ones are clearly and colloquially stated, and are also outcome-orientated and broad enough for your organization to grow into.

ENVISION phase jargon exchange

Vision: Describes the world you want your organization to exist in, expressed as a given; something that's been achieved. Your vision statement should describe the world after you've finished changing it, not before.

Mission: What your organization does every day to get closer to your vision.

Values: The principles upon which you make your day to day decisions. They are the heart and soul of your organization and do not tend to change over time.

Great mission statements are conceived by prompting stakeholders with questions like: "every day, we get closer to our vision by _____" and "it is our mission to _____." Recruit that clever writer once again to synthesize and articulate your mission, and please, resist the urge to write this by committee! Take a look at the following mission statements that were most definitely not written by committee:

- Curtis School: Develop, in every child, a sound mind in a sound body, governed by a compassionate heart.
- Monterey Bay Aquarium: To inspire conservation of the world's oceans.
- Blue Shield of California Foundation: To build lasting and equitable solutions that make California the healthiest state.
- Canal Alliance: [Canal Alliance exists to] break the generational cycle of poverty for Latino immigrants and their families by lifting barriers to their success.

When things get confusing, your **values** are the cultural touchstones that orient and guide your organization's leaders, staff, and stakeholders—and articulating yours is the final step of ENVISION phase. It's likely you already have organizational or core values, but it's unlikely that they are articulated in a way that tells your stakeholders what's expected of them. If you don't already have values, lead your Board and other stakeholders in a simple exercise, asking: "What does our organization care about, deeply?" Select the four or five ideals with greatest consensus behind them and express them as active commands like in the examples below (cue that clever writer again!):

Passive values	Active values
Community	Stand for each other
Excellence	Aim high
Honor	Act with integrity
Impact	Cultivate purpose

If the work in this phase was done by a working group or steering committee, assemble your Board at this juncture—before advancing to the next phase of work—and seek Board affirmation of your new (or updated) vision, mission, and values statements. *ENVISION phase should take approximately three months.*

4 CREATE Phase

Ask yourself, "What do you need to commit to doing in the next # years, in order to become THAT organization?"

To put a finer point on the question: "in order to become the organization whose impact is: your vision, by doing your mission every day, guided by your values, what must you commit to doing *now*?" The answer to this question is in your **strategic commitments** (see jargon exchange on page 7). Strategic commitments shape your organization's identity, define its strengths and weaknesses, establish its opportunities and limitations, and set its direction.

Happily, the seeds of your strategic commitments have already been planted in your situation analysis; specifically the "Conclusions & Implications" section. But now that you have a north star (vision) and a map to find it (mission), it should be clear which conclusions and implications rise to the level of commitments. Commitments can be broad and aspirational, or narrow and tangible—you'll know best what fits your organization—but the most inspiring commitments have two things in common:

- They are stated like this: We commit to _____.
- The verb you use must signal change and create excitement and energy among staff ("continuing" and "maintaining" are not strategic commitment-worthy verbs).

Draft no more than five strategic commitments and present them to the Board for affirmation. A green light from your Board triggers the final step of CREATE phase: developing the **strategic priorities** that ladder up to your commitments.

The exercise of brainstorming strategic priorities is a fantastic way to invite your broader community back into the strategic planning process. This can be done in group or individual discussions, via survey, or even suggestion box. Whatever methodology you choose, the question(s) should be framed as follows for each of your commitments: “how might we realize our commitment to: strategic commitment?” Depending upon your data collection methodology and the size of your community, it’s quite possible your committee will need to synthesize hundreds of ideas understanding that the more times an idea is suggested, the more support there is behind it. If your team and community have time and bandwidth, you may elect to go one step further by creating an online survey in which community members are asked to rank their favorite priorities from those proposed during community brainstorming.

A word of caution regarding this work: your organization’s Executive Director (or President, or Head of School) should be integrally involved in all aspects of strategic planning, but *especially* during CREATE phase. As the chief executive of the organization and the individual who will be tasked to implement the plan, no commitments nor priorities should be drafted without the agreement, support, and enthusiasm of your E.D.

Organizations express their strategic commitments in a variety of ways but here are a few of our favorites:

Organization #1

One of four commitments made by an independent girl’s school, grades 7-12:

We commit to transforming our community so that equity is at the heart of our school’s education.

Priorities:

- Through active recruitment, build a student community that more closely reflects the diversity and culture of our city.
- Conduct a strategic assessment of the financial aid program and expand access in line with needs expressed in the applicant pool, ensuring no financial barrier stands between any qualified student and our school.
- View on-boarding and support services through the lens of equity to ensure all members of our community are able to access the highest levels of our program.
- Advance our equity and inclusion work and imbue these habits of mind into our community ethos.

Organization #2

One of three commitments made by an environmental protection organization:

We commit to improving the health of the nation’s rivers and addressing the impacts of climate change.

Priorities:

- Achieve optimal flow, connectivity, water quality, and river health by protecting and restoring habitats.
- Plan, implement and measure river basins or collections of rivers and streams sharing common biogeographic characteristics.
- Protect river ecosystems—streams, wetlands, floodplains, and riparian corridors—against the adverse impacts of climate change.
- Equitably engage, benefit, prioritize the values and needs of—and mitigate harm to—communities of color and historically marginalized communities along our nation’s rivers.

Organization #3

One of four commitments made by a healthcare foundation:

We commit to breaking the cycle of domestic violence.

Priorities:

- Reduce exposure to domestic violence by supporting early interventions and practices that help children and families most at risk.
- Prevent adolescent relationship violence through youth engagement models and programs.
- Focus on community—and family—based strategies that leverage collaborations, networks, and coalitions to harness cross-sector resources and create more holistic solutions for families and adults impacted by domestic violence.
- Raise public awareness and generate new policies that will counteract negative social norms and reduce stigmas that inhibit people from taking action.
- Contribute to selected data needs on effective prevention solutions.

CREATE phase jargon exchange

Strategic commitments: Actions you will take in the present that bind your organization to a future course of action.

Strategic priorities: The steps you must take to implement your strategic commitments.

Board ratification: When the Board agrees to or confirms the action being taken (in this case, confirms the plan).

Expect to draft, redraft, and wordsmith your priorities with the help of senior staff who'll be called upon to implement them, but avoid program specifics and key performance indicators at this phase. Your strategic plan should be viewed as an outline that will guide senior staff each year as they develop single-year operating plans that reference programs and KPIs.

Congratulations! Your strategic plan is ready for **Board ratification** (see jargon exchange above). This should be done during an official board meeting following [Robert's Rules of Order](#), and the working/steering committee should seek *unanimous* adoption. If Trustees were a part of your steering committee, ask them, along with your organization's Executive Director, to present and speak to the integrity of the process and the work. *CREATE phase should take approximately three months.*

5 COMMUNICATE Phase

Excite your community about the road ahead and inspire everyone to play an active role in your organization's future.

With a new, inspired strategic plan, your community will be hungry to understand what the future of your organization has in store for its stakeholders. That's why powerfully communicating your new plan will serve you well on many fronts. Whether you bring your plan to life through a [compelling printed brochure](#), [microsite](#), a series of community presentations, and/or a [dynamic video](#), this is your moment to *thank* your community for their enthusiastic participation in *creating* the plan while also *inviting* them to help with its implementation.

Because of the time it takes to design and produce communication tools, *COMMUNICATE phase can range from three to six months*, but you should truly think of the COMMUNICATE phase continuing throughout the entire duration of the strategic plan (i.e. five years). To keep the plan and its commitments alive, the plan should be revisited annually, and stakeholders should periodically be reminded how the organization's daily work, it's programs, and initiatives are in service to a broader vision to [your vision here](#) !

Learn More

Mission Minded is a strategy firm that works exclusively with nonprofit organizations.

We believe inspired and actionable planning is essential to a nonprofit's success. Every day we help clients uncover the big, bold ideas that catapult their organization to their next version of greatness. Because in today's world a worthy mission is not enough, you need a north star and road map to guide you on your journey.

Our clients successfully raise more money and attract the support they need to achieve their goals. To find out how Mission Minded can help your organization, call us today at 415-990-9360.