

MARKETING GUIDE

# Strategic Planning for Impact

## Expect More from Your Strategic Plan

## INTRODUCTION

### Why Should You Expect More from Your 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 cause-focused 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.

What you do has always been important, but how you plan to do it requires greater intention and bolder thinking than ever before. Strategic planning is an opportunity to catapult your organization to its next version of greatness, not inch it forward incrementally or operationally.

Your next strategic plan is an opportunity to commit to the big bold vision for the future that will amplify your impact and truly advance your mission. And when your community of stakeholders is included in the **why** of your work they won't let anything stand in their way of getting it done.

Mission Minded helps leaders across the country develop strategic plans that amplify the impact of their work. Whether you lead a nonprofit, foundation, or school you should avoid the five strategic plan pitfalls we've summarized below for a **strategic plan that breaks the mold** and sets you up to successfully lead your organization into a **bold and high-impact future**.

# 1 Most Strategic Plans are Missing the WHY That Inspires People to Support the Plan.

Too often, nonprofit and school leaders confuse the operational business of achieving the organization's mission with the actual impact the organization exists to bring about. Yet it's the impact that puts the "strategy" in a strategic plan.

Looking at hundreds of nonprofit plans you'll find they look strikingly similar. Sorted into functional areas that line up with the organization's operational structure—program, facilities, finance, community, and staff development—are a series of expensive "to-do" lists that are missing the mission-driven WHY behind those operations.

Plans like these get put on shelves and gather dust in their remaining years because they lack the urgency and visionary thinking needed to inspire leaders and stakeholders alike to understand and embrace the work.



## 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 systemically 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.

[See the case study](#)

## 2 When We Ask the Wrong Questions, We Get the Wrong Answers.

Engaging your organization’s community in your strategic planning work is a best practice. The more you engage your stakeholders, the more likely they’ll be to support your vision and plans. But ask them the wrong questions, like “what should we put in our strategic plan?” and you’ll hear myopic ideas, like “improve our buildings” or “recruit more members or students.”

Instead, community ideation framed around the bigger question of what the world needs from your organization should always be utilized because that yields the most inspired solutions.



### Case Study: Sterne School

Sterne, 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 is designed to inspire stakeholders to imagine the world they hope Sterne will bring about—vs. what Sterne will 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 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 attract faculty, staff, students, and donors because of its boldness and clarity.

[See the case study](#)

### 3 Planning That Doesn't Include Results in a Plan That Excludes.

Too many organizations, looking to save time and money, approach strategic planning as a top-down body of work. Senior leaders guide it, maybe even trying to write it during one Saturday retreat, set the tone for the work, and ultimately make the decisions about what goes in the plan.

But stronger, expansive, and high-impact strategic plans require stakeholder communities to contribute to their development. And while it is not best practice to make strategic planning an entirely democratic process, your stakeholders will be disconnected from your plan—and unmotivated to support it—if they haven't been invited in throughout its development.



#### 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 Covid, 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 the 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.

[See the case study](#)

## 4 Most Organizations Fail to See the Powerful Connection Between their Strategic Plan and their Brand Strategy.

Nearly every nonprofit strategic plan includes a goal about strengthening the organization's brand, and for good reason: the strategic plan commits the organization to a bold new direction, and the brand strategy is the reputation the organization needs to get there.

So, if strategic planning and brand strategy are inextricably linked, why then, do organizations so often take on these big projects sequentially rather than in tandem? Setting institutional strategies and brand strategies as connected exercises allows the momentum and efficiency that doubles the impact of the stakeholders you gather to do the work. It can also save time and money.



### 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 over-pollution is at an all-time high. Together we identified the clarity of their founding purpose, which had grounded the organization in its early years, had shifted into something bolder and broader—but undefined.

We partnered with We Don't Waste to articulate an inspiring vision for their future, expanding their 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](#)

## 5 There is no One-Size-Fits-All Approach to Strategic Planning.

Yet traditional strategic planning consultants and well-meaning volunteers often bring their template to the project. But just because an approach worked well with one organization does not mean it will work well with yours. While there are best practices to employ, many organizations fail to consider the unique needs and culture of their organization when structuring an inclusive process that will lead to a bold, inspiring plan.

Mission Minded works with nonprofit organizations, foundations, and schools to tailor your strategic planning engagement. Any formal proposal prepared for you will be highly customized, so please contact us to begin a conversation on your specific goals.

### Similar Schools/Different Approaches

Mission Minded recently conducted strategic planning engagements with similarly sized schools. Both were well enrolled and well positioned financially. Their physical plants—while on opposite coasts—had recently been modernized and both communities had fared relatively well through Covid.

While it seems—on the surface—they'd benefit from a similar approach to strategic planning, nothing could have been farther from the truth. Our process of listening to each schools' unique needs and understanding their unique cultures enabled us to design processes that were inclusive in very different ways. The key difference being how we engaged their stakeholders: One school was hoping to reengage a disconnected community and invite more meaningful participation in the life of the school, whereas the other had more engagement than they knew what to do with and were hoping to direct efforts more productively.

Appropriately tailored inclusion of both school communities resulted in strategic plans that clarified for the respective communities why and how to support their schools in the next five years and beyond.

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

In general, plan to spend 7–14 months on the development of your strategic plan. Please note that the fees below reflect estimated pricing as of January 2023.

### **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 above activities +:**

- 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 above activities +:**

- Half-day, large group messaging session 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 poised to embark on strategic planning, [this blog post](#)—in which nonprofit leaders share their reflections—might shine a light on your readiness. You may also 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 firm that works exclusively with nonprofit organizations, foundations and schools.

We believe strategic planning should catapult your organization to its next version of greatness, not inch it forward incrementally or operationally. Every day, we guide our clients to commit to the big bold opportunities that will amplify their impact and truly advance their mission. Because when your community of stakeholders is invited into the why of your work, they won't let anything stand in their way of getting it done.

Our clients successfully attract more support and raise the money they need to achieve their goals. To find out how Mission Minded can help your organization, call us today at 415-990-9360 or email [amplify@mission-minded.com](mailto:amplify@mission-minded.com).