

# Time to Plan?

## Answers about Strategic Planning for Your Nonprofit

### Why undertake strategic planning?

Strategic planning is the process—and result—of focusing the intelligence of your staff and leadership on making your organization’s optimal future a reality. At Mission Minded, we’ve spent years helping nonprofit leaders uncover the big, bold ideas that have catapulted their organizations to their next version of greatness—and our experience teaches us that inspired and actionable strategic planning is essential to any nonprofit’s long-term success.

#### Here’s why:

- 1. Strategic Planning Inspires:** It engages your internal and external stakeholders in actively pointing your organization towards mission success.
- 2. Strategic Planning Focuses:** It helps your team to zero in on what actions need to be undertaken and to discover which actions aren’t serving your goals.
- 3. Strategic Planning Aligns:** As leaders, your staff, and board will realize shared purpose and commit to shared accomplishment.

### How long will it take?

Without nimble leadership, strategic planning can be tedious—taking up to 18 months filled with frustrating meetings that fail to yield any truly fresh thinking.

Mission Minded takes a different approach. Our strategic planning methodology is efficient, inspiring, and designed to involve only the right people during the right points of the process—which can be completed in a year or less.

# Mission Minded's Methodology

We help you create and communicate your strategic plan over the course of a five-phase process.

## PLAN

Every organization is unique—it's plan should be, as well. At Mission Minded, we chart the course that's best for you and this early planning pays dividends. During the PLAN phase, we help you assemble and align your steering committee, map out an efficient schedule, and define the milestones for success.

## SCAN

The SCAN phase includes a strategic audit, research by the steering committee, and extensive input from your community. As a result of this work, your organization benefits from a robust analysis of its particular strengths, weaknesses, opportunities, and threats.

## ENVISION

During the ENVISION stage, we dig into the inspiring work of imagining and assessing which strategic priorities will prove practical for your organization. This phase results in affirmed vision, mission, and values statements, and a comprehensive matrix of possible strategic directions that your organization can prioritize.

## CREATE

Building on the cumulative input of your community, the CREATE phase focuses on defining a strategic plan and setting aspirational goals, punctuated by a set of essential questions. At Mission Minded, we use the essential questions format because it helps keep plan goals alive for your stakeholders and makes enacting strategies and tactics to achieve those goals easier. These questions will become touchstones you can use to evaluate every decision you make, ensuring you remain on-strategy.

## COMMUNICATE

While your internal stakeholders will have input on your strategic plan throughout the process, the COMMUNICATE phase is the time to build buy-in and community excitement through an engaging roll-out of the plan. We'll create tools including inspiring videos and a website (or microsite) in support of a printed plan summary to ignite enthusiasm across your current and prospective donors, volunteers, partners, and other stakeholders.

**Intellectual Literacy**  
Through teaching and learning excellence, how do we further instill the communication, work habits, habits of mind, knowledge, and resilience needed for success in the next stage of our students' lives?  
Our students will have the ability and agility to see and make an assessment of information in both a reflective...

**Human Literacy**  
How can we develop in our students the ability to know and understand the impact their actions have on others, and to be empathic decision makers?  
Our students will have the ability to understand their own emotions, listen to others and empathize with their emotions, and express emotions productively in order to understand and connect with other human beings.

**Wellness Literacy**  
How can students develop life-long habits of health, balance, and wellness?  
Our students will develop the ability to be aware of and have the skills to make choices that lead to healthy mental and...

**Cultural Literacy**  
How do we continue to foster a community that is culturally and globally inclusive and engaging?  
Our students will develop the ability to communicate across cultures and backgrounds in order to connect, build, and bring people of different social, ethnic, and economic backgrounds...

**Our graduates have healthy, sustainable habits of study and mind.**

**Our graduates have purpose beyond themselves.**

*“The Curtis community is now aligned around a shared set of values and united in achieving a newly articulated vision of pioneering and enhancing programs that set the standard for elementary education in the Greater Los Angeles area and beyond. Thank you!”*

**Meera Ratnesar** as Head of School, Curtis School

# Your Questions Answered

## How will our internal stakeholders get engaged?

Mission Minded recommends building your team's active participation through an appropriate mix of one-on-one interviews, town-hall-style work-sessions, online surveys, an anonymous opinion-box, and conversations with steering committee members. Your budget permitting, we also recommend having a professional visually sketch out the ideas that emerge from town-hall style work sessions in an engaging, graphic fashion. Doing this enables participants to see their ideas come to life before their eyes. Said one internal stakeholder, "My favorite part of the process was when the recorder mapped out our ideas. There were so many great ideas and the feedback kept circulating."

## How does strategic planning for my nonprofit differ from strategic planning in the private sector?

Because private sector organizations are in business to make a profit (or drive stock value), generating new or more profitable revenue streams is the sole point. As such, forensic accounting, financial modeling, and hard-data oftentimes determine strategic priorities. For nonprofits, on the other hand, the bottom line is not profit—it's delivering on the mission. Your goal is to think big about problem-solving and we'll help you gather the soft data around best practices as well as a careful study of the market realities at play in your sector or community as the means of setting strategic priorities for your organization.

## How can we ensure that strategic planning for our organization is successful?

There is no one-size-fits-all approach to strategic planning, because every organization is different. What we find most effective, however, is for your final plan to be *outcomes*-focused rather than *operations*-focused. Doing this ensures your plan truly moves your work forward by the measures that matter most.

## What's the difference between operations- and outcomes-based plans?

Operations-based plans focus on the operations of the organization, whereas outcomes-based plans focus on the specifics of the mission. Consider the difference between these strategic priorities from two different organizations: A) Fulfill our vision for an innovative, state-of-the-art facility, and B) Equip those we serve with the agility to envision and make the most of their lives through innovative service delivery.

Strategies developed based on the priority in example A will be driven by the perceived need to modernize and expand facilities, whereas strategies developed based on the priority set in example B will be guided by measurable impact and focus on the people being served by the facility.

## Should we have a steering committee and, if so, what is their role?

Designing an inclusive strategic planning process needs to begin with the careful selection of a steering committee. Ideally, this committee will be made up of 10 to 12 highly-engaged members of your internal stakeholder group, representing a diverse range of perspectives and roles including staff at various levels, administrators, and board members. They'll need to give freely of their time, talents, opinions, and ambassadorship. As a committee, their role is to steer a rigorous, inclusive, transparent, and enjoyable process—for themselves and the entire organization.

Led by Mission Minded, the committee will roll up their sleeves and investigate the external environment in which your organization operates. The steering committee leads this external evaluation because when committee members own the research, they realize and articulate the right strategic priorities for the organization.

## What role should our board of trustees play in crafting our strategic plan?

Your board has a fiduciary responsibility to ensure the long-term success of your organization and so they—in partnership with the executive director—should approve the need to invest in strategic planning. Once the process is underway, invite two or three trustees to sit on the strategic planning steering committee so they can serve as liaisons between the committee and the full board; they'll help communicate the plan's methodology and results and ensure your trustees remain engaged. Ultimately, you'll need your board of trustees to approve and adopt the strategic plan so they can partner with the executive director in implementing it.

## How many years should our strategic plan cover?

Assuming there are no leadership transitions looming, five years is usually the right length of time for a nonprofit's strategic plan to cover. Five years is long enough for your current staff and leaders to feel connected to the plan's goals, and brief enough to keep those goals practical in a rapidly changing world. Mission Minded will help you determine the right time span for your plan based on your unique circumstances.

## We don't have a strategic plan, but we've got messaging and fundraising issues we need to solve yesterday. Can Mission Minded help?

If you have messaging and fundraising issues, you likely have a brand problem. And there is no brand challenge too big or too small for Mission Minded.

When possible, we recommend that we collaboratively develop new brand strategy based on the long-term strategic vision for your organization. Informed by our work with hundreds of nonprofits and foundations over nearly 20 years, Mission Minded has developed a unique, hybrid strategic planning/branding approach designed to set you up with a strategic plan and a brand strategy within a year. This process integrates our signature BrandEquation™ and Minute Message Model™ methodologies into a larger strategic planning framework, enabling you to align both in nearly half the time of taking on these initiatives sequentially.

## Our strategic plan is complete. Gulp. Now what?

Now that you're done planning, it's time to make the most of your efforts and investment. Get your leadership team out of the office for a retreat every year, put your multi-year plan up on the wall, and **ask the group three questions:**

- What can easily be accomplished in this coming year to demonstrate momentum towards our strategic objectives?
- What more weighty goals could we accomplish if we dedicated time and moderate resources?
- What most aspirational goals can we reach with an infusion of significant capital funds?

With your goals for the year laid out and your leadership team in agreement, the answers to "now what?" are ready to be put into action.

## What about our brand?

While undertaking strategic planning, many organizations realize that they need to strengthen their brand to improve mission-delivery, fundraising, community engagement or all three. Mission Minded can help. If you think you might need to strengthen your brand, here are [6 questions to ask yourself first](#).

## What now?

If your organization could benefit from a strategic plan that aligns your team and resources around a long-term vision, Mission Minded would be happy to develop a customized proposal based on your needs, budget, and timeline. Give us a call at 415-990-9360 or email us at [amplify@mission-minded.com](mailto:amplify@mission-minded.com).

## 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 road map and a set of essential questions 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.