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Groundwork for Good Fortune: The Real Power of Strategic Planning

DAVID ALLYN | MAY 12, 2017

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It's the phone call every nonprofit leader dreams of. "I'd like to give you a very large sum of



money." At first I thought it might be a scam, but when I realized the caller was the real deal — a philanthropist who cared deeply about education — a new question came to mind: How would we spend that much money?

Fortunately, we had just concluded a twelve-month strategic planning process, had a board-vetted plan for growth ready to go, and were able to submit that plan to the donor with only minor revisions. Several weeks later, we received our first-ever seven-figure gift.

To quote the Roman philosopher Seneca, "Luck is what happens when preparation meets opportunity." Nonprofit organizations often treat strategic planning as a luxury, opting to focus on more pressing, day-to-day matters. And because, as time-management guru Steven Covey has framed it, strategic planning is entirely Quadrant II (important but not urgent), its inherent value is easily overlooked.

The concept of deliberate strategic planning goes back at least as far as the late 1960s, which is when John Argenti published his landmark ***Corporate Planning*** and when companies began engaging in **SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis**. The nonprofit sector embraced strategic planning in the 1980s and 90s, as the number of registered 501(c)(3)s began to explode, "charities" became more professionalized, and the

competition for grant dollars increased. In 1993, Patrick J. Burkhardt and Suzanne Reuss published ***Successful Strategic Planning: A Guide for Nonprofit Agencies and Organizations***, one of the first books to help nonprofits with their long-range planning.

Still, apart from the occasional discussion at a staff meeting or board retreat, organized strategic planning often takes a backseat to the day-to-day work of running an organization. Yes, schools use strategic planning to shape and guide their capital campaigns, but for nonprofits that don't mount major fundraising campaigns, setting aside time for strategic planning can be seen as more burden than blessing.

At ***Oliver Scholars***, the time and effort that went into strategic planning paid off handsomely when we were asked by our angel donor for a well-thought-out growth plan. Is your nonprofit prepared? The following ten tips can help your organization get the most out of its next strategic planning process:

1. Read *Forces for Good: Six Principles of High-Performing Nonprofits*. First published in 2007, this ***widely praised book*** by Leslie Crutchfield and Heather McLeod Grant is a research-based analysis of why some nonprofits excel and others do not. I commend it to any nonprofit leader or manager about to participate in a strategic planning process.

2. Review your organization's vision statement (or create one if it doesn't have one). A vision statement is not the same thing as a mission statement. A mission statement

describes, in general terms, what an organization does. A vision statement lays out an organization's ultimate objective. You'll want to use your vision statement (not your mission statement) to guide your strategic planning process. Why not the mission statement? Because you may decide, after the strategic planning process is complete, that you need to update your mission statement. Your vision statement, on the other hand, should be a kind of polestar that doesn't change. No matter what projects Oxfam decides to take on, for instance, its vision — "A just world without poverty" — will stay the same. If your organization doesn't yet have a vision statement, now is the time to draft one. And be sure to include key stakeholders — trustees, staff, external partners — in the process.

3. Establish a time frame. As an executive director or board chair, it's in your best interest to determine the time frame for your strategic planning process and the overarching goal of the process. It's hard to get much done in less than a year, but more than a year and things start to drag.

4. Conduct a SWOT analyses. A SWOT analysis is a simple tool for inspiring thoughtful discussion. I recommend conducting separate SWOT analyses with staff and with your board. If you are an executive director, be prepared to hear about "weaknesses" that sound like criticism of your leadership. It's okay: sometimes people just need to voice what's on their mind. And remember: while a SWOT analysis shouldn't limit the discussions of the strategic planning committee, it should inform those discussions.

5. Choose your planning committee leader wisely. If possible, choose a committee chair who is both visionary and well-organized (two qualities that, admittedly, are often hard to find in the same person). If that's not possible, co-chairs are your next best option. You need someone who can motivate the committee to think big, *and* someone who can keep the process moving forward.

6. Get the right people on the bus. A strategic planning committee needs to have representatives from as many of your constituencies as possible. That means board members, external advisors, and staff. Staff members can be expected to provide a "front-line" perspective, but they may also be concerned about growth and workload, not to mention major decisions (like a merger) that could affect their responsibilities and position in the organization. You may also want to encourage the committee to go into executive session (where ideas can be discussed without staff present) on occasion.

7. Create a set of clearly defined goals. Ask yourself: Why are we embarking on this process? Does it end with the launch of a capital campaign? Is it to recharge our brand? Is the committee striving to draft a written plan? By when? Will there be a budget associated with the plan? The clearer the goals at the outset, the more effective the committee (and the whole process) will be. And knowing what you want to get out of the process will make it much easier to communicate expectations to your strategic planning committee.

8. Distinguish between the tactical and the

strategic. As the committee begins its work, many ideas will emerge. Some of these ideas will be strategic, but many will be tactical. The difference between these two categories is sometimes hard to pin down. I think of strategic decisions as decisions that affect the mission of the organization and tactical decisions as decisions that can be implemented without any chance of affecting the organization's mission. Of course, even strategic decisions should not alter the organization's vision statement (see Step 2).

9. Do your homework. Good strategic planning requires data collection and research. What do other organizations do? What have they tried that didn't work? What do funders want to support? What do your constituents really need? Good research on the front-end will save you enormous time and effort years from now.

10. Create rubrics for evaluating your ideas. Most strategic planning committees will come up with a handful of exciting ideas. You need a good system for evaluating these proposals. A rubric will help you determine your priorities and guard against any one committee member feeling that his or her ideas have been ignored or devalued. For instance, a simple rubric might include "Alignment with Vision Statement," "Value to Constituents," "Doable with Current Resources," and "Appeal to Funders."

Strategic planning can be an invigorating and exciting process — even when it doesn't result in significant change or growth. The mere activity of imagining the future is guaranteed to get staff and trustees energized. And if, as happened at Oliver Scholars, a donor should come knocking

with a major opportunity, you'll be fully prepared to make your case for support.

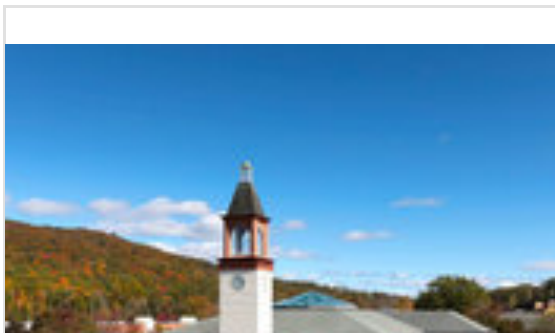
*David Allyn, PhD, is the CEO of **Oliver Scholars**, which prepares high-achieving African-American and Latino students for success at the nation's best independent schools and colleges. He is, in addition, the author of numerous articles and books and has written on the topic of nonprofit leadership for the Stanford Social Innovation Review, Nonprofit and Voluntary Management Quarterly, and Huffington Post.*

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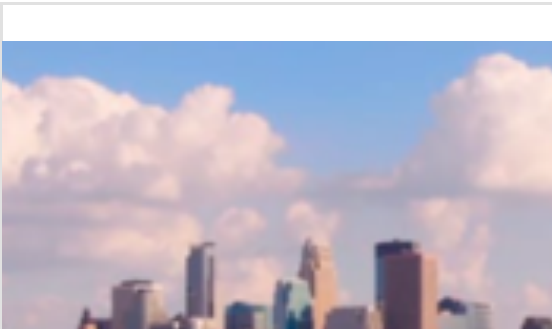


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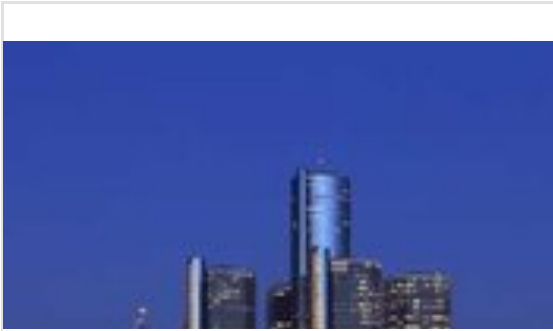
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