

Strategic Planning Conversation



“What has your attention determines your direction, which determines your destination.”

- Andy Stanley

Strategic vs Tactical

STRATEGIC

Future

Long-Term

Anticipatory

Growth-Oriented

TACTICAL

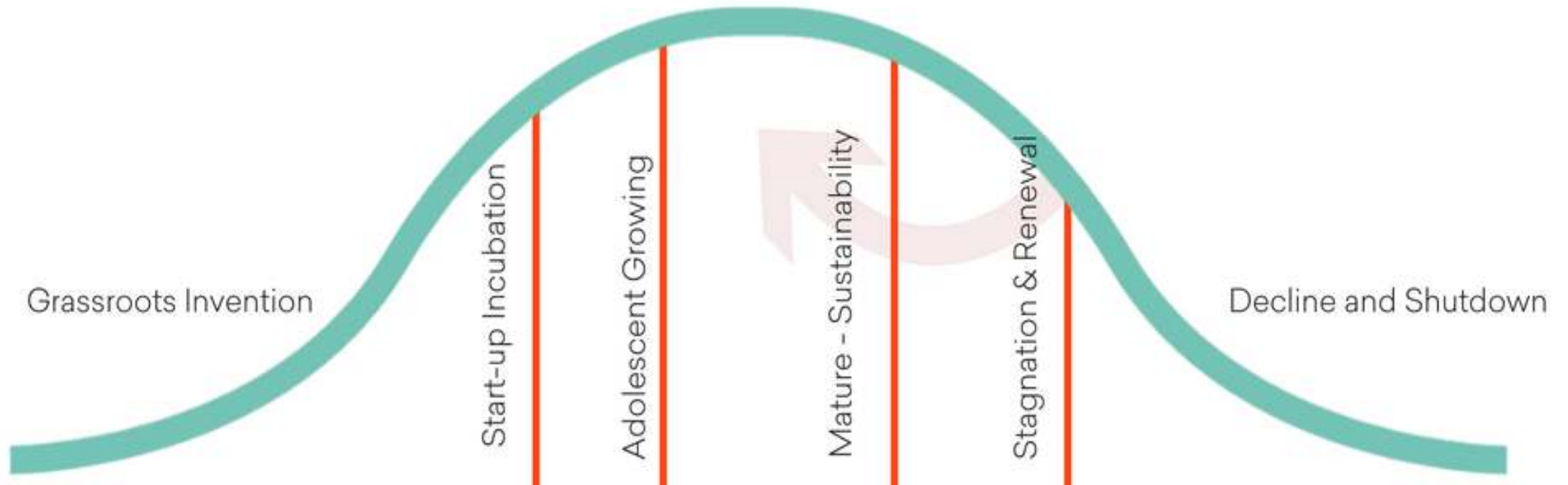
Present

Immediate

Reactive

Survival-Oriented

Speakman Nonprofit Lifecycle



Created from Speakman Management Consulting's adaptation of: The 5 Life Stages of Nonprofits, Judith Sharken Simon, 2002 and The Conservation Company, 1997.

Strategy

A clear idea of the best way forward towards a shared version of the destination.



Strategy

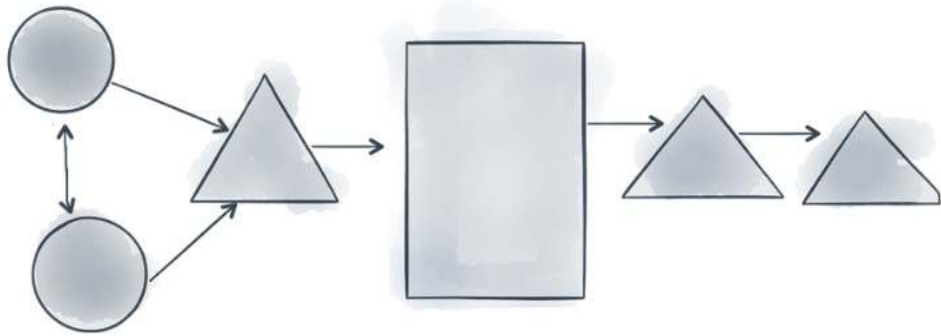
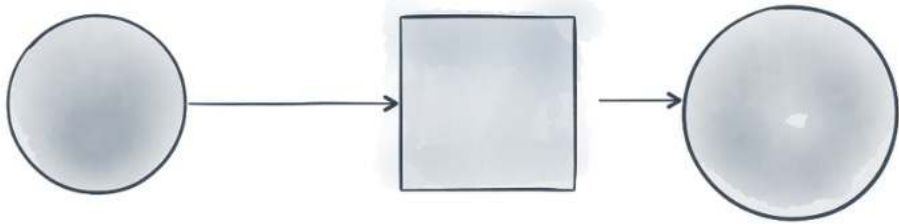
30, 60, 90 days

1 year

3 years

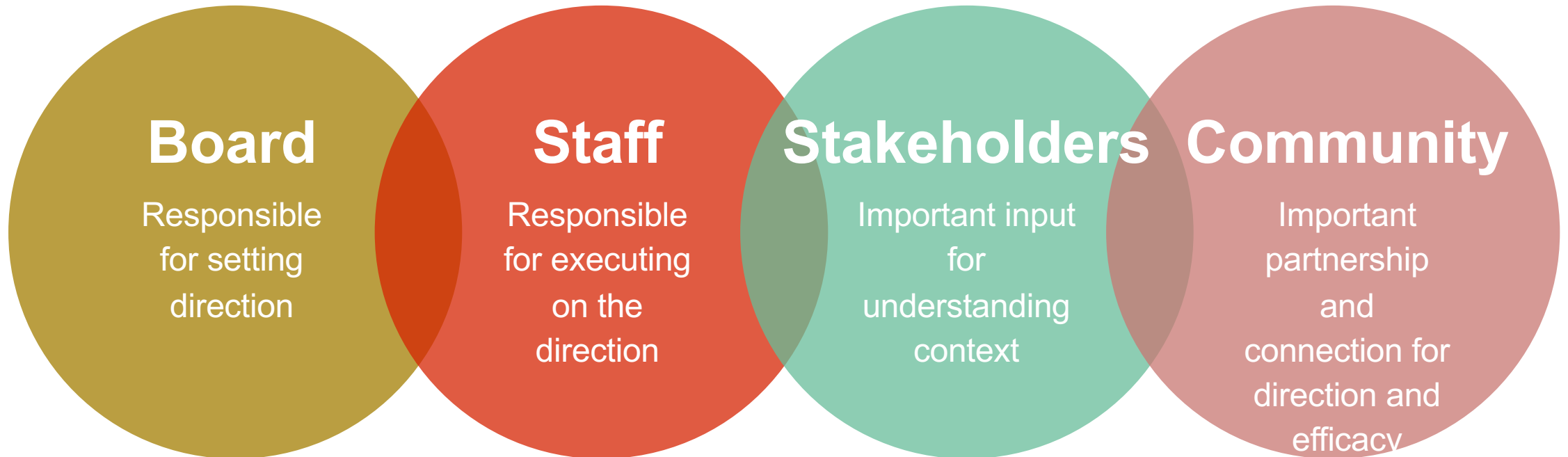
5 years

20 years



WHO...

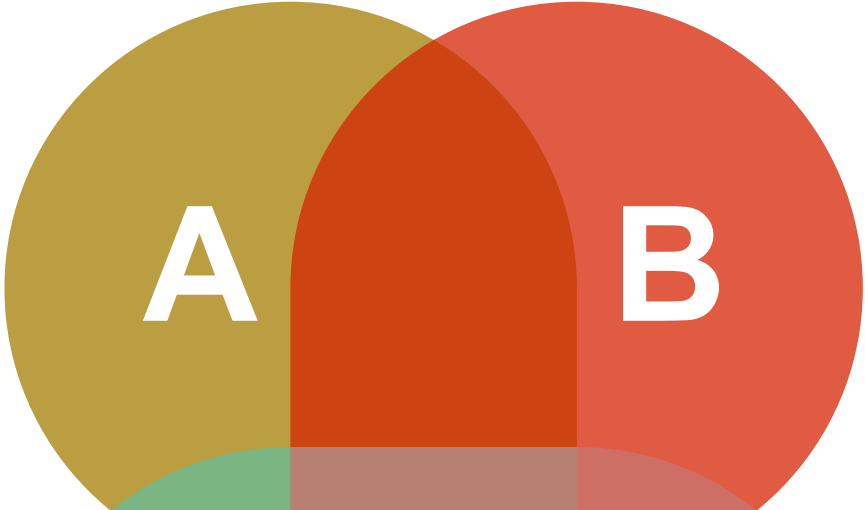
Who Should Be Involved



HOW...

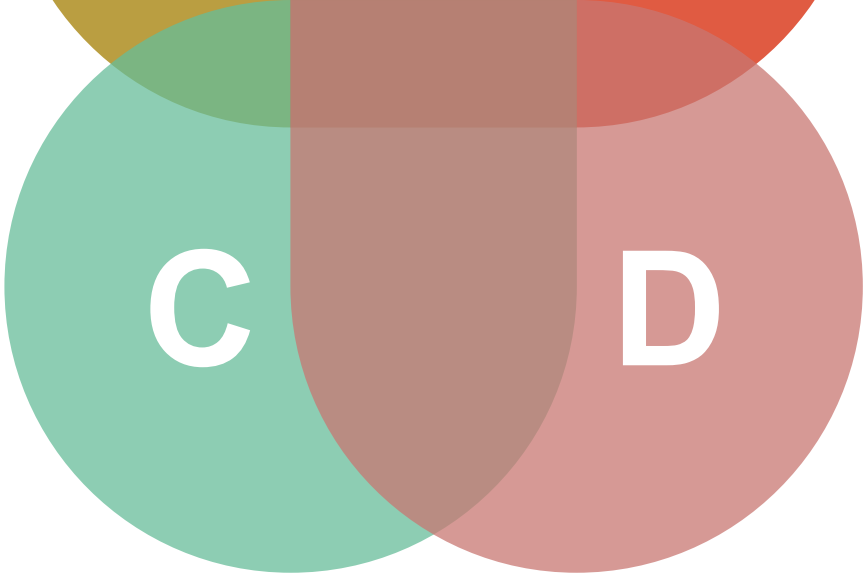
Strategic Planning is the intersection of...

VISION/MISSION



**STRATEGIC
QUESTIONS**

DEEP LISTENING



DECISION-MAKING

A. Mission vs Vision

MISSION

Why you exist

Use to make
decisions

VISION

Desired end state

Inspirational

Long-term change

VISION HORIZON

YOUR VISION/ "JUST CAUSE" ●

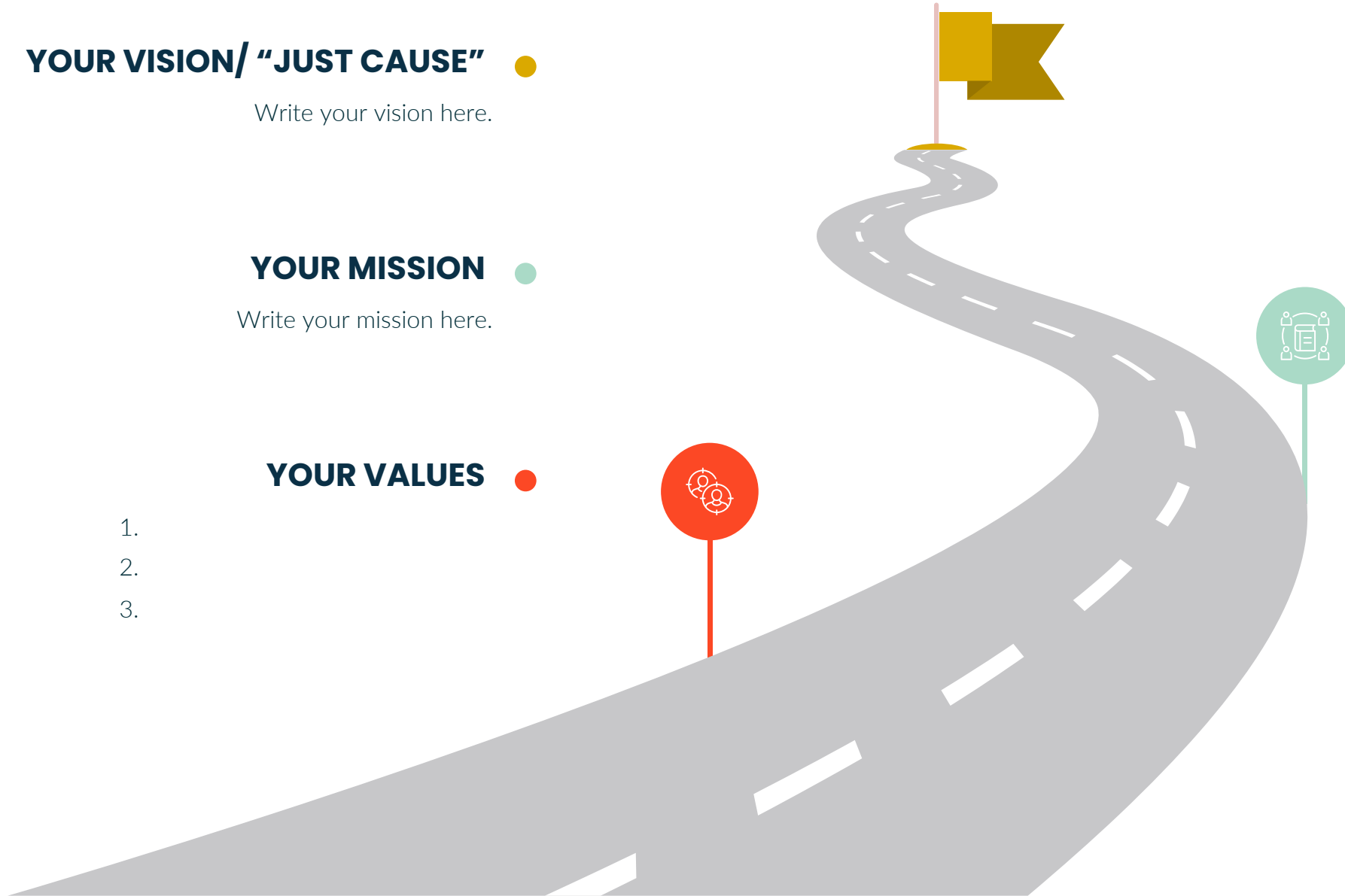
Write your vision here.

YOUR MISSION ●

Write your mission here.

YOUR VALUES ●

- 1.
- 2.
- 3.



B. Strategic Questions

- Where we are going? What is our shared image of what future success will look like?
- What are the critical paths/areas of focus for our strategic plan to ensure the future success of our organization.
- Do we have a bhag? (Big, hairy, audacious goal)

C. Deep Listening

equity model of engagement

a rich community
engagement
model is
dependent on the
intersection of
data, expertise,
and the
community voice

DATA



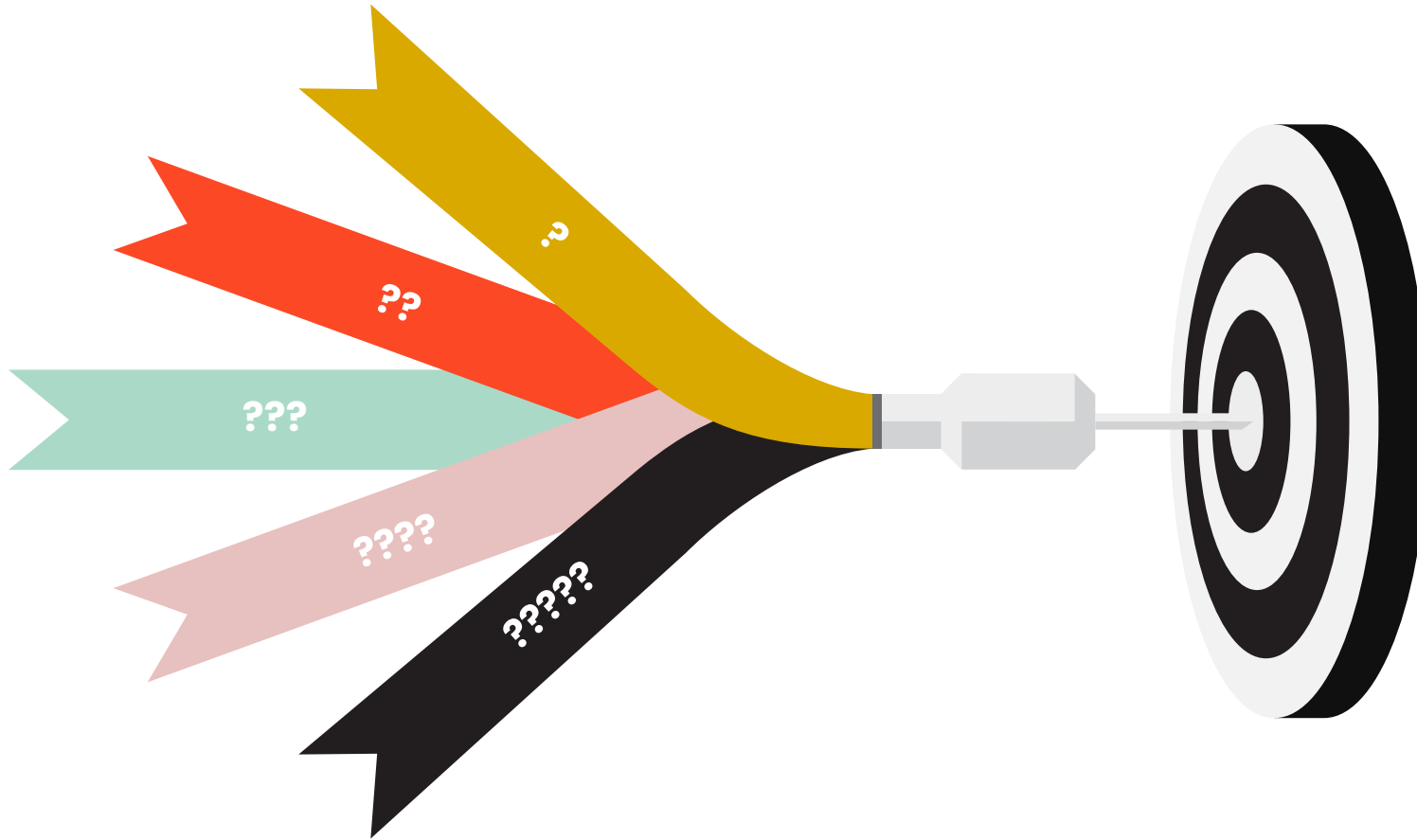
EXPERTISE



COMMUNITY
VOICE



D. Decision-Making



WHAT...

INSIDE A STRATEGIC PLAN

Words are important. This is how we define the parts of a strategic plan and their relationship to each other.



Implementation Plan

tactics

specific steps you will undertake to accomplish the changes



resources & timing

specific details of who is responsible for the success of the work and if there are budget implications



Goals: some principles

- State only one Goal for each Strategic Path issue.
- Virtually all nonprofits will need to have in their Strategic Plans include, among others, Goals for:
 - Governance
 - Resource Development
 - Programs
- Goals should require 3 or more years to achieve.
- Goals must be measurable in quantitative or qualitative terms.
- Ask yourself: How do I assess how the organization is doing in pursuing this Goal?

Strategies: some principles

- For every Goal there are likely to be 4 to 6 Strategies.
- Use action verbs.
 - What is it we intend to do to pursue the stated Goal?
 - Are there better ways of pursuing the Goal?
 - What changes are we making? Are these realistic?
- Is the Strategy consistent with our Mission and Values?
- Do we have the resources necessary to pursue this Strategy?
- How will we measure success in pursuing the Strategy?
 - Quantitative or qualitative data is needed; no pass/fail

Strategies: distinguished from tactics/initiatives

- ① Strategies generally cannot be accomplished in less than a year; most take several years.
- ② Strategies are not a check list; no pass/fail.
- ③ Strategies require multiple steps to complete.
- ④ Tactics/Initiatives – Think of these as being steps to be taken to pursue an given Strategy
- ⑤ Tactics/Initiatives may be accomplished in very short periods of time.
- ⑥ Tactics/Initiatives should be prioritized according to completion timeframes.

What can a plan look like?

Outcome: Action verb + goal/item + {so that, which, because}
Measure of Success:

Strategy 1:			
Action Steps	Tactics	Who's Responsible	Due Date

Strategy 1:			
Action Steps	Tactics	Who's Responsible	Due Date

What else could it look like?

mission

The Local Initiatives Support Corporation (LISC) is dedicated to helping community residents transform neighborhoods into healthy and sustainable communities of choice and opportunity -- good places to work, do business and raise children. LISC mobilizes corporate, government and philanthropic support to provide local community development organizations with: loans, grants and equity investments; local, statewide and national policy support; technical and management assistance.

values

authenticity | interdependence
racial equity | learning

commitment

Between 2010-2012 we will invest a total of \$17 million to support the building of sustainable communities.

vision

We envision a prosperous Twin Cities that embraces the wealth of its own diversity and where neighborhood quality of life is optimized through a regional commitment to equitable and comprehensive community development. We envision a region where all residents, regardless of geographic location or community of origin:

- live in quality homes that are affordable
- can work and have opportunities to build assets
- are able to buy their necessities in strong local marketplaces
- attend effective schools
- are safe and healthy
- have access to vibrant arts, recreation programs and usable open space
- are engaged in civic discourse and policy decisions that affect their daily lives

We call this building sustainable communities

Strategic Plan Summary

2010-2012



goals and core work

developing physical, economic and human assets



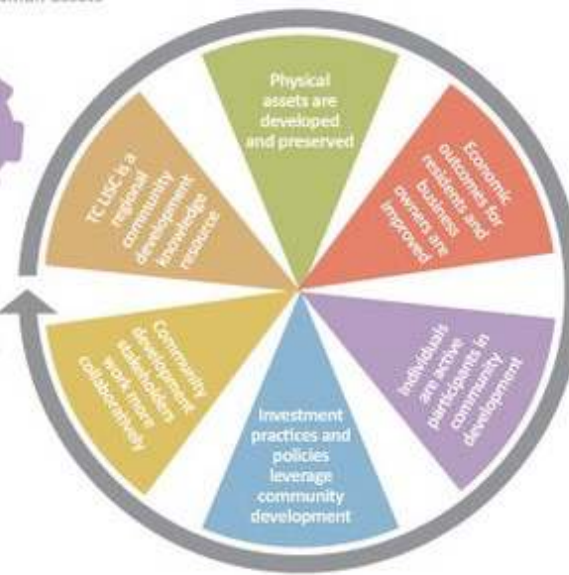
IMPLEMENT INTEGRATE LEARN

raise, leverage and invest financial resources

connect and align interests, expertise and resources

aggregate and share knowledge

anticipated outcomes



Plan Do's

- Internal and external
- Dream, Synthesize, Plan
- Finance
- Measures

A DREAM WRITTEN DOWN WITH A
DATE BECOMES A **goal.**

A GOAL BROKEN DOWN INTO STEPS
BECOMES A **plan.**

A PLAN BACKED BY **action**
MAKES YOUR DREAMS COME TRUE.

- greg s. reid

Plan Don't's

- Don't allow staff to write it
- Don't use the process to shut out ideas
- Don't Neglect to involve external stakeholders
- Don't forget to consider your environment
- Don't do it in one day

