Strategic Planning for Nonprofits

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Roles of Boards: Hanlon Model

- Provide continuity for the organization
- Select and appoint a chief executive
- Govern the organization by broad policies and objectives
- Acquire sufficient resources for organization’s operations
- Account to the stockholders (or public) for the products and services of the organization and expenditures
Roles of Boards: BoardSource

1. Determine the Organization’s mission
2. Select the Executive
3. Support the Executive & Review Performance
4. Ensure Effective Organizational Planning
5. Ensure Adequate Resources
6. Manage Resources Effectively
7. Determine and Monitor Products & Services
8. Enhance the Organization’s Public Image
9. Serve as a Court of Appeal
10. Assess Its Own Performance
“All to often, on the long road up, young leaders become servants of what is rather than shapers of what might be.”

— John Gardner
Strategic Planning is a systematic, inclusive leadership and management process that results in a high-level framework for shaping the future of the organization. This framework serves as the basis for operational planning, aligning resources, making decisions and evaluating progress.
Benefits

- Develops and documents a shared understanding for the current situation and position of the organization.
- Engages key decision makers in charting strategic direction
- Strengthens congruence and relationships among planning team
- Pinpoints priorities and targets for change
- Focuses resources on change and priorities; distinguishes between the “vital few” and the “trivial many.”
- Provides tool for communicating with external and internal stakeholders
- Serves as basis for monitoring and reporting progress and making mid-course corrections.
The Process

- Planning to Plan
- Completing Environmental Scan, Situation Audit, Data Gathering
- Exploring Possibilities
- Affirming Mission, Vision & Guiding Principles
- Generating Strategy and Priorities
- Engaging Teams in Action Planning
- Completing and Communicating the Plan Document
- Establishing Monitoring and Reporting Mechanisms
Critical Elements

- Full support of key board and staff
- Involvement of key internal and external stakeholders
- Focus on big picture
- Commitment to candor about current realities and changing external and internal forces
- Openness to change
- Reasonableness of goals and timelines
- Commitment to implementation and results
- Commitment to strong follow through and accountability
Roles of Directors in Strategic Planning

1. Understand the Current Context
2. Understand the Current Business Model and Results
3. Stay current on emerging competition, challenges and trends
4. Contribute to exploring possibilities and crafting strategy
5. Establish accountability and monitor results
6. Advise regarding mid-course corrections
7. Revisit strategic regularly
Tips for being “shapers of what might be”

- Set adequate time aside to discuss the big picture
- Ask good questions
- Explore possibilities and ideas
- Report Strategic progress at board meetings
- Discuss one strategic issue or best practice at each board meeting
- Distribute reading about strategic issues or best practices in advance of board meetings and planning sessions
Summary and Conclusion

- Summary
- Questions and Answers
- Adjourn