Strategic Planning Jumpstart for Nonprofit Organizations is a guide for nonprofit executive directors and board members who would like to revise or create a strategic plan. This guide may be used by a single organization or a host organization bringing together a network of three to five nonprofits that will go through the process of strategic planning as a group.

With a network of nonprofits, the organizations will convene at least five times over a 12 month period. During these meetings, executive directors and board members will share the results of the planning process and identify areas of growth. This network creates a space for support, accountability and troubleshooting.

Below is a recommended timeline for a six month planning period and twelve month planning cycle.

Month-to-Month Plan: Develop purpose and scope of plan; form organization planning team/structure or identify host group of nonprofits.

- Month 1: Survey stakeholders and collect data using internal, external, and financial assessment tools
- Month 2: Review survey results
- Month 3: Establish mission, vision, and values statements and complete internal and external assessment and financial/funding review
- Months 4-6: Create goals, strategies, measurements of success, and financial plan
- Month 6: Receive board approval on strategic plan and begin implementation
- Months 7-12: Track strategic plan implementation
- Month 12: Follow up with nonprofit (individual organization or cohort) and review results

The tools outlined below are discussed in this guide and serve to guide the process of strategic planning.

1. Strategic Plan Outline
2. Strategic Plan Model Table of Contents
3. Strategic Plan Jumpstart Checklist
5. Internal Assessment
   a. Organization Timeline
   b. SWOT Analysis
   c. Financial Assessment
6. External Assessment
   a. Sample Stakeholder Surveys
7. Measures of Success
Nonprofit Strategic Planning
Great Nonprofits/Nonprofit Leaders

MISSION DRIVEN
RESULTS FOCUSED
PEOPLE ORIENTED

STRATEGIC PLAN

What is a Strategic Plan?

- Roadmap for mission success and impact.
- Guiding Light and high level set of directions to achieve mission.
- Aligns mission, results, and people.
- Not a business plan (Marketing and Investment) or operating plan (Annual).

Strategic Planning Process

Role of Board: Policy, Planning, Resources, Oversight

Role of Staff Leadership: Process, Inspiration, Engagement of Staff and Community
Strategic Plan Outline

Mission (Purpose)

Vision (Theory of Change)
  Values

Goals/Strategies
  - Programs
  - Volunteer Service

Governance/Organization
  - Staff
  - Volunteers
  - Board Members
  - Management Systems
  - Processes
  - Improvement Areas

Measures of Success/Impact
  - Inputs
  - Outputs

Annual Operations Plan, Strategic Plan Tracking and Revision

Internal Assessment
  Mission and Program Assessment
    - Performance history
    - Financial history
    - Strengths, Weaknesses, Opportunities, Threats
    - Issue identification

External Assessment
  Trends
    - Economic/Legal/Social Issues
    - Marketplace (Clients, Competitors, Changes)
    - Distinct Mission Competence
    - Stakeholders (Community Members, Donors, Supporters, Political Representatives)
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<th>Table of Contents</th>
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<td>Timetable</td>
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<td>Action Areas and Responsibilities</td>
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<td>Annual Objectives</td>
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Strategic Plan Jumpstart Checklist

✔ Mission (Purpose)

✔ Vision (Promise)
  o Reflect on Theory of Change: What Is Different When You are Successful and Achieve the Desired Change and Impact

✔ Values (Operating Principles)
  o The Rules You Live By

✔ Internal Assessment
  o Timeline of Organization
  o Mission Impact History
  o Program and Services: Size, Scope, Results, Client Quality
  o Financial History
    ▪ Operating: Revenue, Expense, Net
    ▪ Balance Sheet
  o Governance
    ▪ Board Size, Tenure, Friend-raising/Fundraising
  o Administrative Capacity
    ▪ Staff Size, Talent, and Tenure
    ▪ Facilities and Technology

✔ External Assessment
  o Economic Trends
  o Demographic Trends
  o Marketplace/Competitive Analysis and Community Positioning
  o Regulatory/Legal Changes
  o Key Stakeholders and Relationships

✔ SWOT Analysis
  o Strengths
  o Weaknesses
  o Opportunities
  o Threats

✔ Organization’s Top Issues (Big 5)

✔ Goals and Strategies
  o Mission Differentiation/Positioning
  o Programs and Services
  o Funding
  o Infrastructure
  o Organization (Staff, Volunteers, Governance/Board)

✔ Management Systems
✔ Measures of Success
✔ Implementation Plan
The Anatomy of a Mission Statement

A mission describes your purpose within one to two sentences.

- Make it Memorable
- Answer the 4 Ws:
  - What do you do? What are the programs/services?
  - Who do you serve?
  - Where do you serve?
  - Why do you do it and how do you measure your impact?

An example of a mission exercise is to define the purpose of an organization by answering the following questions:

- Why does this organization exist?
- What does the organization do to achieve its purpose?

NOTE: Always reference the original Articles of Incorporation and/or current bylaws as mission is reviewed.

Sample Mission Statements:
The ABC Community Foundation helps people make a difference by inspiring the spirit of giving and by investing in people and solutions to benefit every neighborhood in ABC.

The City Community Center is a community-based organization in which builds the potential of youth and adults through character building, education and healthy living programs, serving all people with a focus on families.

The Anatomy of a Vision Statement

A vision is your promise world within one sentence. Overall, you are answering the question what would be different if you were successful.

Answer the 4 Ws:

- What do you want to do?
- Who do you do it for?
- Where will you do this work?
- Why will you do this work and how will positive change occur?

An example of a visioning exercise is to answer these questions and/or create headlines that describe your nonprofit in five years:

- How will our “community” be improved if we are successful in achieving our mission?
- What “services” will we offer that are known as best in class?
- How will our board and staff be known in the community?

Visioning should consider core ideology (purpose/values) and an envisioned future.
Sample Vision Statements:
The ABC Community Foundation seeks to create a community where people care about each other and help each other to improve education, economic outcomes, and public safety by contributing time and resources to their city, engaging 50% of residents in voting, volunteer work and contributions to nonprofit organizations.

The City Community Center will serve one out of every 10 families in our City within the next five years, creating opportunities for improved education, employment, and health.

Theory of Change

A comprehensive description of how and why a desired change is expected to happen, and the connection between the program or change initiative/activities and the long-term goals, represented in a Logic Model.

Sample Theory of Change:
The ABC Community Foundation will connect people’s volunteer time and resources to issues within the community, creating a positive impact on selected education, economic, and public safety results.

The City Community Center will engage 10% of families, directing them to actions which improve the educational, employment, and/or health results of the youth and adult members of the family.

Core Values
Personal beliefs, which endure and are independent of current events. Few (3-5) but mighty.

Sample Values:
Integrity
Creativity and Innovation
Excellence
Equity and Fairness
Internal Assessment

A strategic evaluation of your organization’s history, strengths, weaknesses, opportunities, and threats build a strategic framework of mission, vision, goals, and resource allocation as well as priorities.

Organization Timeline

Create a timeline with key events highlighting the history of your organization.

SWOT Analysis

Ask your staff and board to identify your internal strengths and weaknesses and the external opportunities and threats. This is best done in a group setting, but you can also survey for responses.

Top Three Programs (Scope, Size and/or Impact):

1. 
2. 
3. 

<table>
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<tr>
<th>STRENGTHS</th>
<th>Top Three Strengths:</th>
<th>WEAKNESSES</th>
<th>Top Three Weaknesses:</th>
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<th>THREATS</th>
<th>Top Three Threats:</th>
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Top 3-5 issues to be addressed in Strategic Plan

1. 
2. 
3. 
4. 
5. 
## Financial Overview

**Organization Name:**

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<tr>
<th>Revenue/Funding Sources – Private</th>
<th>Last Year</th>
<th>Two Years Ago</th>
<th>Three Years Ago</th>
<th>Four Years Ago</th>
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### Organization Revenue and Expense

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<th>Two Years Ago</th>
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<td>Total Revenue</td>
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<td>Total Expenses</td>
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<td>Other</td>
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<td>Total and By Program</td>
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### Organization Net Information

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<th>Four Years Ago</th>
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<td>Audit Results</td>
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External Assessment

Organization Name: ________________________________

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<th>Community Demographics</th>
<th>Last Year</th>
<th>Three Years Ago</th>
<th>Forecast</th>
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<tr>
<td>Number of Communities Served</td>
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<td>Ethnicity Breakdown</td>
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<td>Employment Rate</td>
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<td>Public Safety/Crime</td>
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<td>Education</td>
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Describe the communities you serve:

_____________________________________________________________________________________

List of key stakeholders:

_____________________________________________________________________________________

(Administer Stakeholder Survey)

List of organizations comparable to yours:

_____________________________________________________________________________________

Describe the impact the following areas have on your organization:

- Economy

- Government Policies

- Government Regulations

- Other

Identify External Reference/resources:

Demographic Reports

Program Research
Sample Stakeholder Survey

Organizations with five to seven key stakeholders within their network.

Organization Name: __________________________________________________________

Due Date: ________________

1. How have you worked with _________________? (Please check one)
   - Client
   - Donor
   - Volunteer
   - Board
   - Other: ______________________

2. How important is the mission of _________________? (Please check one)
   - High
   - Medium
   - Low

3. What is the quality of service from _________________? (Please check one)
   - High
   - Medium
   - Low

4. Describe the mission of _____________________________________________________

5. How would you strengthen this organization’s impact in the community?
1. Program
   a. Inputs (Numbers)
   b. Outputs (Activities)
   c. Outcomes (Results)

2. Quality

3. Member/Client Satisfaction

4. Fundraising

5. Marketing/Communications/Stakeholder Relations

6. Financials
   a. Operating
   b. Revenue (Mix)
   c. Expense
   d. Net
   e. Cash Flow
   f. Balance Sheet

7. Staff

8. Board

9. Volunteers

10. Facilities/Technology/Infrastructure
## Strategic Plan Implementation

- Milestones
- Progress (Balanced Scorecard)
- Annual Objectives/Results Tracking

### Strategic Plan Timeline

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<tr>
<th>Timeline</th>
<th>Action Items</th>
<th>Approval Process</th>
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| **Month 1**  | • Form strategic planning committee  
• Administer stakeholder surveys and collect data using internal, external, and financial assessment tools | • Receive board approval of committee and scope of plan               |
| **Month 2**  | • Review stakeholder survey results                                           |                                                                      |
| **Month 3**  | • Establish mission, vision, and value statements  
• Complete internal and external assessment and financial/ funding review | • Preliminary review by board and staff leadership                   |
| **Months 4-6** | • Create goals, strategies, measurements of success, and financial plan       | • Review with staff and board  
• Receive board approval on strategic plan                             |
| **Months 7-12** | • Track strategic plan implementation  
• Review results                                                          | • Review with board                                                  |