

Can a Small Organization Create a Good Strategic Plan?

What are the steps to planning on a small budget?

Q Our organization is small. We have a budget of less than \$100,000 and a board of only nine. We see the value of strategic planning and feel we're ready to embark on this process. However, we can't afford to bring someone in to help us create a strategic plan. Can you give us an outline of the steps we should follow – steps that will result in something worth the time and effort?

A Your organization is lucky to have a board that recognizes that it can't operate effectively by taking each day at a time. "Strategic planning" – and I put it in quotes because everyone you talk with will define and approach it differently – is ultimately what you make of it.

Some organizations dive deep, spending months, money, and many, many person hours on determining the direction that's right for them. Others get together for a half-day of concentrated effort to come up with a few key goals. Of course, organizations may fall anywhere in between. Since you're a small organization that hasn't done a strategic plan before, I recommend keeping it simple.

I know you want to do it yourself, and I'll give you steps for doing so, but I do recommend you get someone to lead you through the process. This person needn't be a costly consultant. You might find, for example:

- **a professor** who teaches planning
- **a strategic-planning officer from a bank, hospital, or major corporation**
- **the board chair of another nonprofit** who has been through this process who will be happy to volunteer.

Such a person will keep you on track – and free all your participants to engage fully in the process.

Then, follow these steps:

1. Determine who you want to involve in the planning process. Ask yourself these questions:

Will you bring in some community stakeholders? Their input can be extremely valuable, especially since you exist to serve the community. If you decide to include their voice, who among them can provide the most useful insights? And if you forgo having these individuals, how can you be sure to capture their wisdom?

If you have staff members, do you want to include them in the planning? You certainly should involve the executive director, but you may want to take advantage of the expertise the others can offer as well.

2. Pick a day that works for the greatest number of people. This process will take you a good six, seven hours.

3. Choose a place where you can work uninterrupted. Many small organizations like meeting at someone's house, which is certainly pleasant. But you want to be sure that the dog is in the back room and the space is large enough for tables and comfortable chairs to accommodate everyone. You might find the boardroom in a law or CPA's office more conducive.

Arrange for flipcharts (there are table-top varieties that don't require stands), markers, and tape that won't damage walls. If you use a stand, be sure it's not one of the flimsy ones or you'll spend the entire day trying to rebalance the pad of paper.

Don't forget the food! You want everyone well fortified.

4. Start the day with a short exercise tied to introductions to allow everyone to meet one another. This is especially important if you bring in community stakeholders who may not know your board members. Choose an activity that's tied to the goal of the day, such as having each person name one program your organization offers that they see as essential to the fabric of your community. If they can't name any, that tells you something!

5. Spend time reviewing your mission, vision, and values to make sure that they're easily articulated and that they speak to how the community will be a better place as a result of your organization's accomplishments. Take the time to tweak your current mission, vision, and values if needed. This is critical because everything you do from this point forward will be based on these three. Consider your vision as the meta-goal, the big end result.

In groups or as part of one large brainstorming entity, work backwards, identifying the goals you'll need to meet to reach your vision. Consider any challenges for which you'll have to find work-arounds.

The idea of working from the vision instead of from where you are now is key. You may expend a great deal of time on less relevant work if you brainstorm goals without the vision clearly in mind. And, if you can identify most of the steps it will take to reach the vision, you have in essence plotted out your goals not just for this year but for years to come.

6. Put the goals into some sort of loose order, combining those that naturally go together.

7. Identify three to seven goals that you can realistically tackle over the next 12 to 18 months. These should be significant goals that are consistent with your vision and

values and will require a concerted effort. The “no brainers” – those goals that can be easily achieved with minimal resources – should just be put on your to-do list rather than added to your strategic plan.

8. For each of your identified goals, determine your criteria for success. In other words, spell out how you’ll know that you’ve achieved what you set out to do. Make the indicators measurable where possible to leave no doubt in anyone’s mind that the organization has reached its target.

Put a target date on each goal, and assign someone to be accountable for seeing each of these goals through to completion.

Write down the goals with their deadlines, the person responsible, and the criteria for success.

At the end of the day, back at your organization, put your list of goals, deadlines, and criteria where it can be easily and regularly accessed to measure progress.

9. Build your board agendas around the three to seven main goals you’ve identified. Committee and staff reports should focus on what’s being done to further these goals.

Spend a good portion of your meetings discussing whether you’re on target and how to proceed if not. Consider if the goals are still applicable and whether they should be adjusted based on the most current realities. Strategize about the resources required to achieve each goal and the role the board can play in ensuring that these resources are available.

10. Make a plan to celebrate your achievements.

– *Terrie Temkin, Ph.D.*,

Founding Principal, CoreStrategies for Nonprofits, Inc.

(terriet@nonprofitmanagementsolutions.com) and editor of You and Your Nonprofit Board: Advice and Practical Tips from the Field’s Top Practitioners, Researchers and Provocateurs (charitychannel.com).

Making a Plan

Delve deeper into strategic planning with articles such as these at NonprofitWorld.org:

Strategic Planning on a Budget (Vol. 23, No. 4)

Creating a Values-Based Road Map (Vol. 23, No. 2)

Before You Plan Where to Go, Find Out Where You Are (Vol. 29, No. 3)

Grounded Visioning: A Quick Way to Create Shared Visions (Vol. 26, No. 4)

How Can Your Board Participate in Strategic Planning? (Vol. 30, No. 2)

Ten Steps to Excellence: Mission to Action (Vol. 23, No. 4)

Build the Latest Trends into Your Planning (Vol. 17, No. 6)

Should You Change Your Mission? (Vol. 20, No. 3)



please get in touch...

We would love to hear your response to anything in **Nonprofit World**, your comments about any aspect of the nonprofit sector, and your concerns about your daily work. Please get in touch in any of the following ways:

Drop us a note at: Letters to the Editor, Nonprofit World, P.O. Box 44173, Madison, Wisconsin 53744-4173.

E-mail to: muehrcke@charter.net

Please include your name, organization, address, phone number, and e-mail address. If you’d like your comments to appear anonymously, please let us know. We look forward to hearing from you!



WHAT’S UP ONLINE?

Would you like to discuss some of the issues addressed in **Nonprofit World** with other nonprofit professionals? Do you have questions to ask or expertise of your own to share?

Society for Nonprofits is actively engaged on LinkedIn, Facebook and Twitter. Find us on your favorite social media platform by visiting **social.snpo.org**

If you have any questions, contact Jason Chmura at jchmura@NonprofitWorld.org