



Strategic Planning: Why it NEEDS to Happen

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| If there was
one thing...

Smart
Strategic Planning is vital for
Sustainability &
Success



The Foundation

The foundation for an effective planning process:

- Strong Leadership
- Commitment
- Trust
- Collaborative Process
- Transparency

A valuable byproduct of an effective strategic planning process is team building.

Key Components

Key components for an effective planning process:

1. Stakeholder Involvement
2. SWOT Analysis
3. Mission, Vision & Values
4. Key Growth Areas
5. Strategic Goals
6. Budget
7. Metrics
8. Ongoing Monitoring

1. Stakeholder Involvement

Do you have the “right people in the room”?

- Leadership Team
- (Subsection) of your Board
- Feedback from those you serve
- Management input
- Strong facilitator



2. SWOT Analysis

Brainstorm around your organization's:

- **S**trengths
- **W**eaknesses
- **O**pportunities
- **T**hreats

Internal

S

Strengths

- Efficient & ethical manufacturing?
- Skilled workforce?
- Good marketshare?
- Strong financial base?
- Trustworthy reputation?

W

Weaknesses

- Outdated facilities?
- Obsolete technology?
- Weak management?
- Inadequate finances?
- Past planning failures?

External

O

Opportunities

- Possible new markets?
- Strong economy?
- Smaller market rivals?
- Emerging technologies?
- Growth in existing market?

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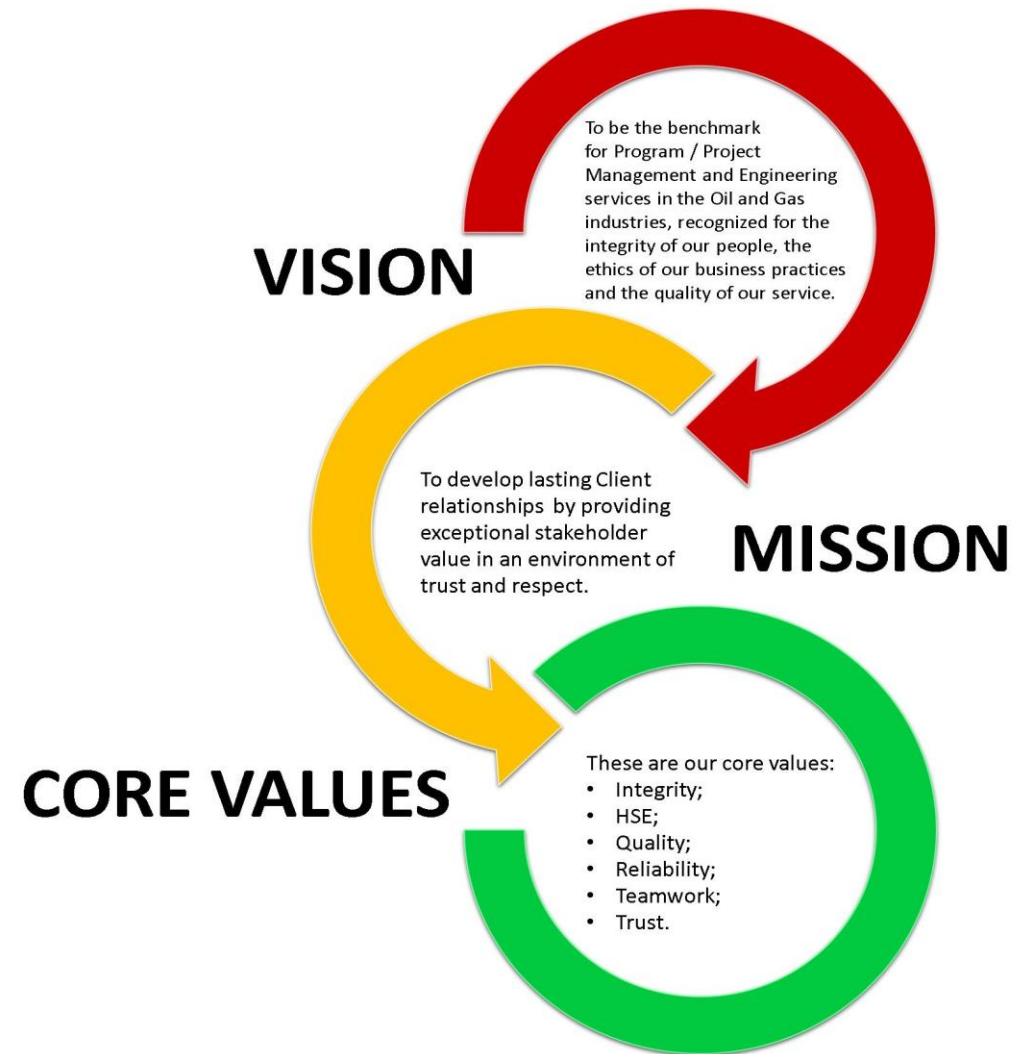
Threats

- New or existing competitors?
- Shortage of resources?
- New regulations?
- Changing market tastes?
- Cheaper, substitutable options?

3. Mission, Vision & Values

An opportunity to:

- Review your mission
- Get positioned to identify your key strategic goals and align them with your mission, vision and values



4. Key Growth Areas

As a SP Committee:

- Identify your organization's key growth areas
- Reference SWOT for support
- Ensure alignment with your mission



5. Strategic Goals

How do we identify our main strategic goals?

- Consider capacity and resources
- Aim for 1- 2- and 3-year goal setting
- Core areas: resource development, board development, social enterprise, social impact programming



6. Budget

It is vital to have a defined budget as part of your SP.

- One year is sufficient
- For Board and/or Committee approval
- More real numbers; less projections



7. Metrics

Have you identified (the *right*) metrics for each of your goals?

- What goals can be quantified and should have defined metrics in your SP?
- Position your organization to define its SROI (Social Return-in-Investment)



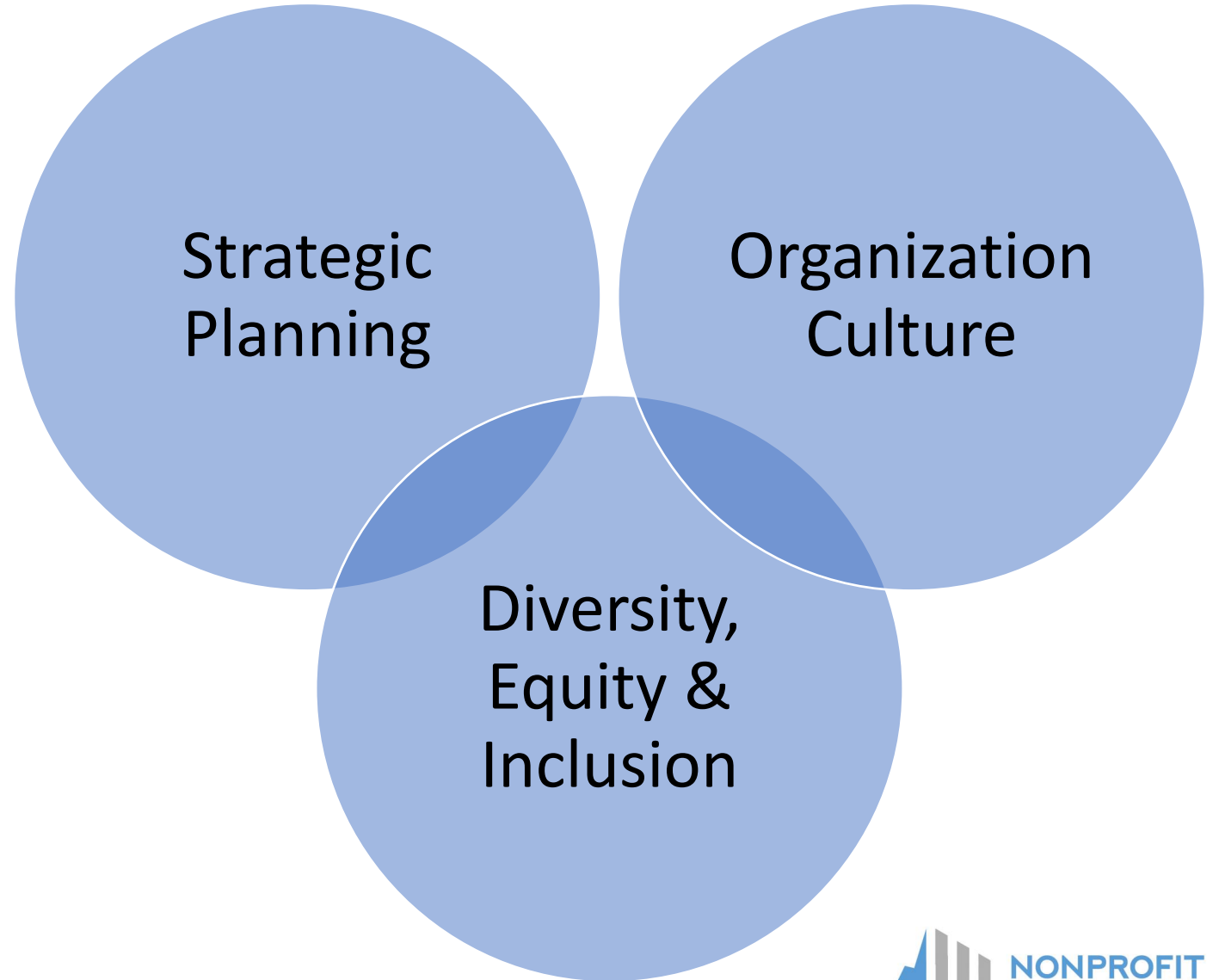
8. Ongoing Monitoring

How are you tracking your progress?
How will you communicate your progress?

- SP Report Card
- Quarterly or biannual *high-level* reporting to your Board
- Ensure that you have an **active** plan



The Importance of Your DEI Work



Your SP Roadmap*



**We'll share a template to help you get started or complement your existing process*

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Thanks!
Questions?

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