



Strategic Planning | The Beginning

Creating a Process that Produces
Results



Funding For Good

Lead Consultant, Marie Palacios

Strategic Planning Facilitation • Meeting Facilitation •
Stakeholder Processes • Board Solutions •
Leadership Development

Book a Call About Strategic Planning or Board Development

www.fundingforgood.org/strategic-planning-consult

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What we'll cover

- Why a strategic business plan is vital for sustainable growth
- Tips for achieving “buy-in” from your board, staff, and stakeholders
- How your vision and mission drive the process
- The top 10 things every organization should know before crafting a strategic plan
- Key components of a multi-year strategic plan
- Stakeholder basics-who should participate in the strategic planning process and how to engage them
- How to conduct an environmental scan



POLL | What's your role in your organization?

- A. Board/Executive Leadership
- B. Exec. Management/Senior Staff
- C. CFO/Development
- D. Staff
- E. Consultant
- F. Other



POLL | Where are you in the strategic planning process?

- A. Curiosity stage
- B. In the middle of one
- C. Hope to complete a plan in the next 12 months
- D. Completed plan and working to implement it



What Is A Strategic Plan?

Funding For Good's definition:

“A live document that:

- ✓ Defines where your organization is going
- ✓ Confirms what success looks like in measurable terms
- ✓ Offers a roadmap on how you plan to get there

It is NOT:

- Business as usual
- A stand-alone development plan
- A multi-year implementation plan

1

Capture current realities

- Prior experience
- Misconceptions
- Commitment
- Availability

2

Clarify benefits

- Double chances of success
- Proactive vs reactive
- Donor ready

3

Confirm responsibility

- Planning is a core duty
- Participation of key decision makers is critical

4

Commit to an intentional process

- organized
- thorough
- timely
- inclusive

5

Create meaningful engagement opportunities

- pre-planning
- retreat
- implementation

5 Steps to Secure Buy-In

Small Business Statistics

- Almost all U.S. businesses are small businesses.
- 33.2 million businesses in the United States qualify as small businesses, making up 99.9% of all U.S. businesses. (2024)
- There are nearly 1.8 million nonprofits in the U.S.A; they employ 11.9 million people
- The nonprofit sector is the 3rd largest industry in the U.S.A.
- 20% of businesses fail in the first year, 30% in the second year and 50% by year five.
- 38% of businesses fail due to exhausting their cash reserves or the inability to secure additional capital.
- 42% of businesses that close within the first five years do so because of inadequate market demand.

Why is a strategic plan important?

- Confirms a shared vision (Aka: “destination)
- Provides direction by outlining strategies and steps for accomplishing goals
- Allows organizations to evaluate, measure, and share successes
- Promotes development plans (programs, resources, personnel)that are mission/vision focused)
- Creates “ownership” and builds consensus
- Helps “problem-solve” (vision-focused vs. content-focused)
- Ensures that the executive leadership and staff are on the same page
- Increases chances for success and sustainability
- Assures donors and stakeholders that the organization is a worthy, safe, and timely investment



Strategic Business Plan Statistics

1. “Entrepreneurs with business plans are 260% more likely to launch.
2. A business plan increases the chances of growth by 30%.
3. Approximately 70% of businesses that survive for 5 years follow a strategic business plan.
4. 71% of fast-growing businesses have plans.
5. Compared to businesses without a written plan, those with one had a 7% higher likelihood of experiencing high growth.
6. One study found that only 35% of surveyed business owners had finished a business plan.
7. Business plan finishers were twice as likely to succeed.”

Source: <https://www.businessdit.com/business-plan-success-statistics/>

Top Reasons Plans Fail



1. The right people aren't at the decision-making table
2. Facilitation failures- process or techniques
3. The plan is too "broad"
4. The plan is too "narrow"
5. Unrealistic goals
6. Failure to establish/enforce accountability processes
7. Inability to distill "major goals" into "action and implementation plans."



**“Nonprofit is our tax id status –
Not our operating model.”**

-ELIZABETH BRAZAS

PRESIDENT, COMMUNITY FOUNDATION OF WESTERN NORTH CAROLINA



“The greatest legacy a leader
can leave behind is an
organization that can thrive
without them.”

-Marie, Funding For Good



Multi-Year Planning

Scope by Year

1. Long-term dream
2. Short-term vision
3. Mid-plan benchmarks
4. Year one achievements
5. 90-day action and implementation plans

Components

1. Vision statement and long-range goals
2. Describes **both** subjective goals and objective success indicators for the last year of the plan
3. Serves as a point of reference on velocity
4. Establishes short-term success indicators
5. Provides marching orders for the first quarter

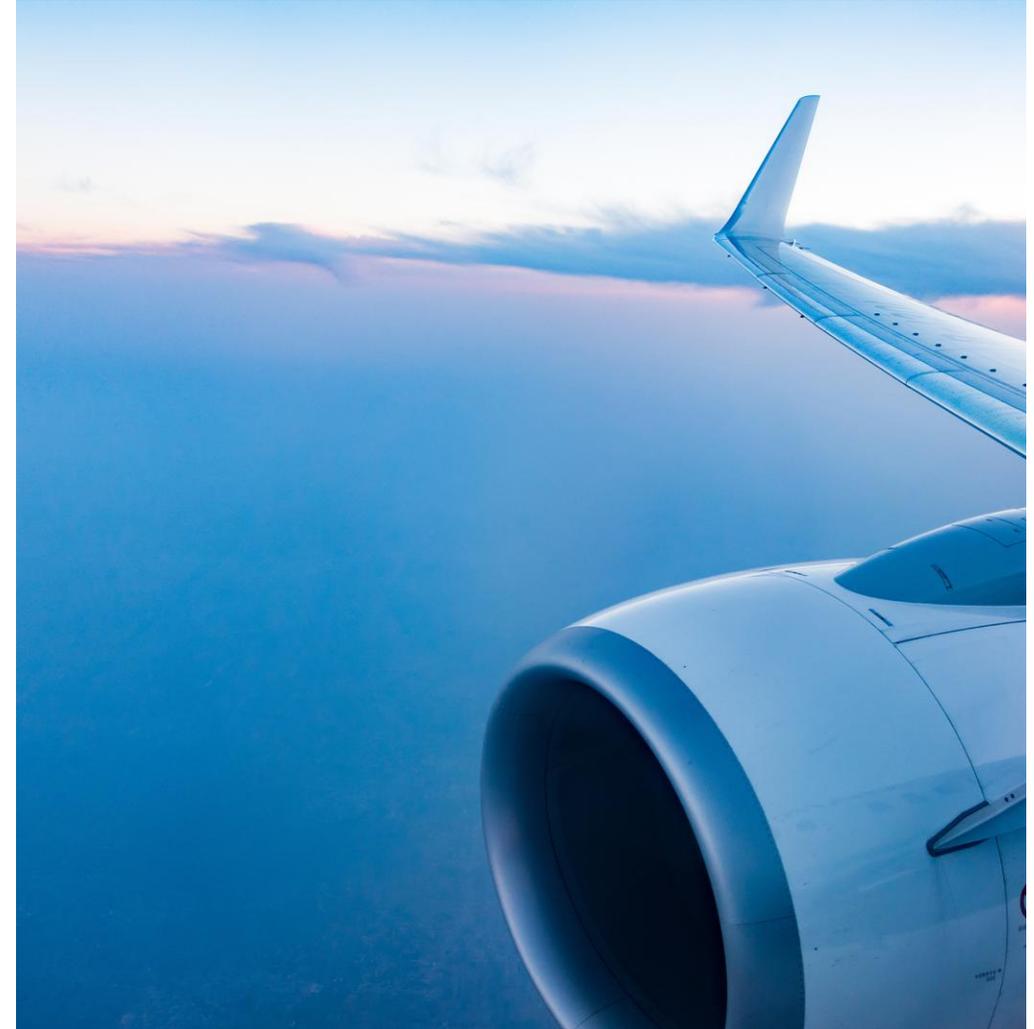
Break it Down

3 Questions Every Strategic Plan Should Answer

1. Where are we NOW?
2. Where do we want to BE in ___years?
3. How do we get there?

The Process: Focused Conversations

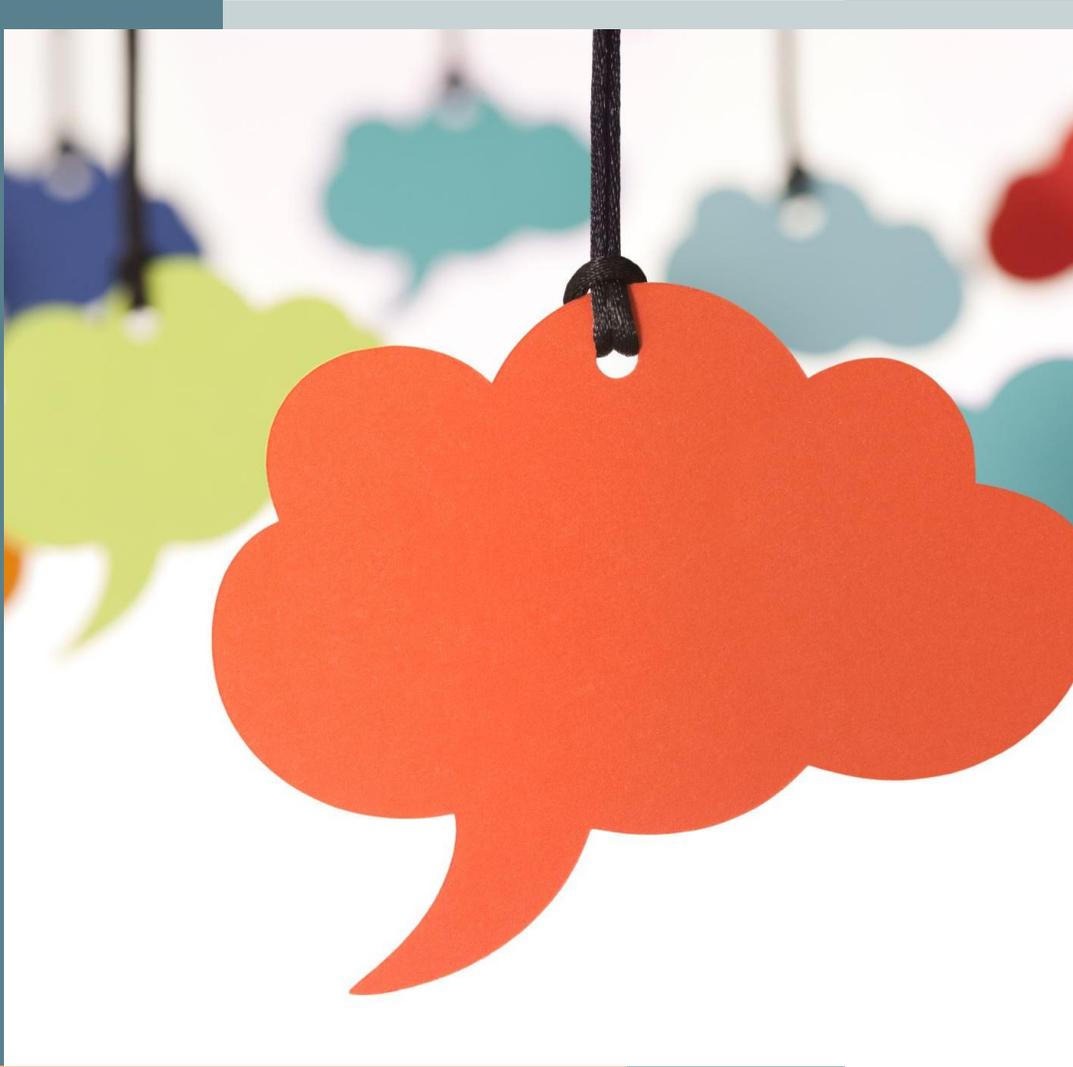
1. Environmental scans
2. Visioning and goal-setting sessions
3. Action/implementation



Top 10 Things To Know Before Crafting a Plan

1. What will the process entail?
2. What time frame will the plan cover?
3. How long will the process take?
4. How will we capture and prioritize ideas?
5. Who should participate?
6. How can we best engage participants?
7. What do we need from a facilitator?
8. Have we answered the question: "Where are we now"
9. Is our vision/mission current and relevant?
10. Who will convert conversations into a written document?





Stakeholder Analysis and Engagement

- Whose voice must we listen to as we seek to understand issues and prioritize solutions?
- Who has the power to influence our plan? (+ or -)
- How can we secure feedback/support from stakeholders?
- How will we use stakeholder feedback in a meaningful way?

Scope of Work Considerations

External

Do we want/need:

- A market study (review of existing study, cursory, or comprehensive study)?
- Expanded stakeholder engagement processes- hot, warm, or cold/general public contacts?
- Subject matter expertise pre-planning, planning, or implementation phase?

Internal

Do we want/need:

- Additional support to solicit feedback and engage multi-level team members in the planning process?
- In-depth analysis of programs, services, financials, leadership, or operating systems?
- Support to ensure accountability/facilitate review and planning sessions?
- Subject matter expertise to put the plan into action?





The Role of a Facilitator

- Provide a framework for the process
- Craft intentional questions designed to help “focus” the group
- Educator vs. consultant vs. facilitator
- Create an inclusive atmosphere
- Foster individual participation
- Encourage consensus building within the group
- Guide the group’s action planning and reflection processes

Do we need an outside facilitator?

- Is this the first time your organization has created a strategic plan?
- Was a prior strategic plan considered unsuccessful?
- Do participants have a wide/differing range of views on what is important and what is not?
- Has anyone from your organization facilitated strategic planning successfully? (skill set, qualifications?)
- Do members of the organization lack motivation to complete the process?
- Do key leaders want to share their opinions but are afraid of dominating the conversation if they are acting in a dual role (participant and facilitator)?





What to expect from a facilitator?

- Detailed description of the PROCESS
- Define their personal facilitation STYLE
- The strategic planning METHOD
- Template/description of final PRODUCT
- Outline of “who does what?”
- Key timelines
- Cost of service
- Scope of work
- Referrals

Components

SWOT Analysis

- Strengths
- Weaknesses
- Opportunities
- Threats
- + Achievements



Strategies

1. Online options (Miro, Mural, Zoom)
2. In-person (sticky charts and markers)

Helpful Hints for Facilitation:

- *Which contributions require further clarification?
- *What does not appear on this scan that should be included?
- *What surprised you the most?
- *How might these current realities impact our upcoming planning priorities and/or processes?

Is Your Core Messaging Current and Relevant?

Vision

- Defines where you want to be in the **FUTURE**
- Explains **WHY** you exist
- Designed to **INSPIRE**

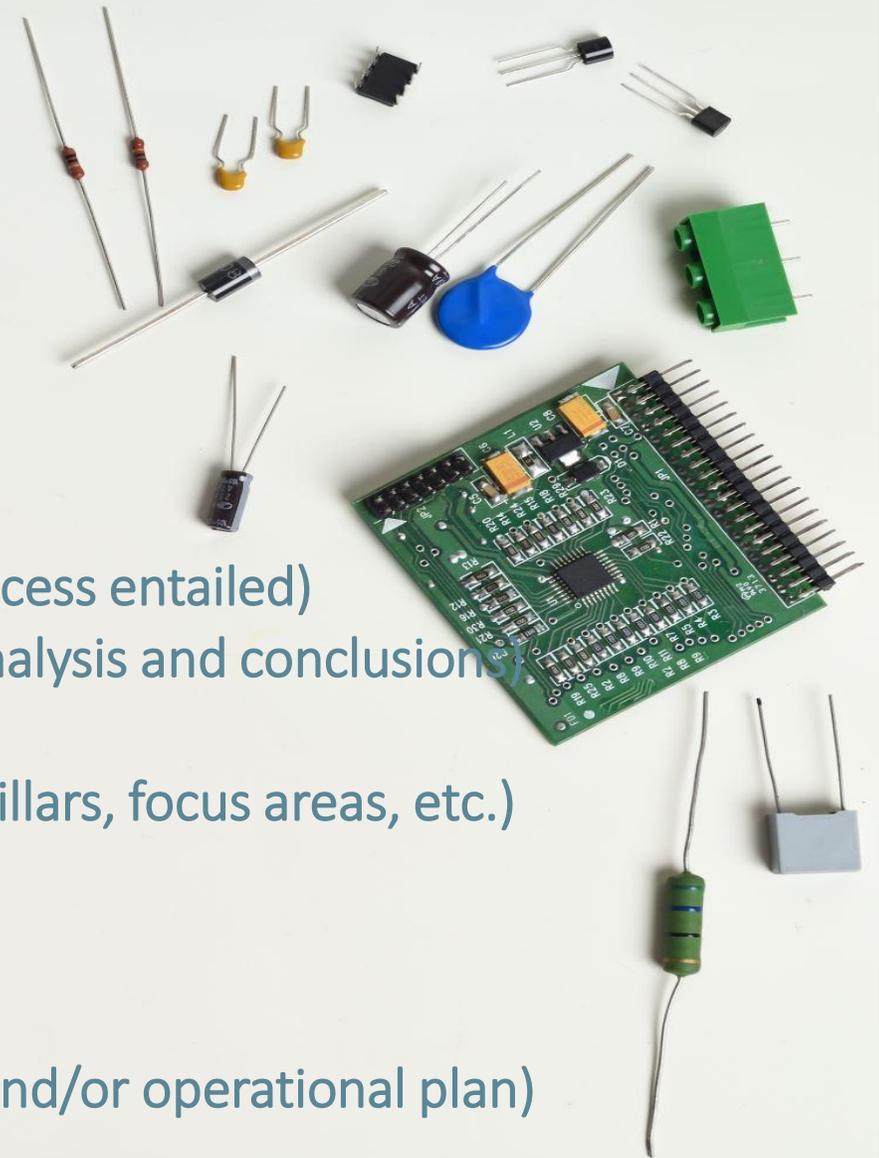
Mission

- Describes what we do in the **PRESENT**
- Explains **HOW** we do it
- Designed to **INFORM**



Checklist: Strategic Plan Components

1. Cover Page- (Header, logo, strategic plan dates, etc.)
2. Table of Contents
3. Organization Description
4. Executive Summary (What the strategic planning process entailed)
5. Current Environmental Realities (external/internal analysis and conclusions)
6. Core Messaging (Vision, Mission, Values)
7. Priority Areas (Aka: goal areas, strategic directions, pillars, focus areas, etc.)
8. Goals (Vision + measurable goals/objectives)
9. Potential Blocks/Barriers
10. Growth Strategies
11. Actions Plans (Aka: Implementation steps, financial and/or operational plan)
12. Appendices





Remember:

An intentional PROCESS is vital to ensure a current and relevant strategic plan.

Additional Resources

✓ Free Strategic Planning QuickStart Kit- <https://fundingforgood.org/impact-work/strategic-planning/>

 YouTube Channel Strategic Planning Playlist – www.youtube.com/fundingforgood

 FFG YouTube Playlist (https://youtube.com/playlist?list=PL7KMjiEftADzpdR_bcTvLSiqhkT8f-bwg)

 Articles- <https://fundingforgood.org/?s=strategic+planning>

 Explore Funding for Good's strategic planning services- <https://fundingforgood.org/impact-work/strategic-planning/>



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Q + A