Strategic Planning in Nonprofit Organizations

From Vision to Implementation

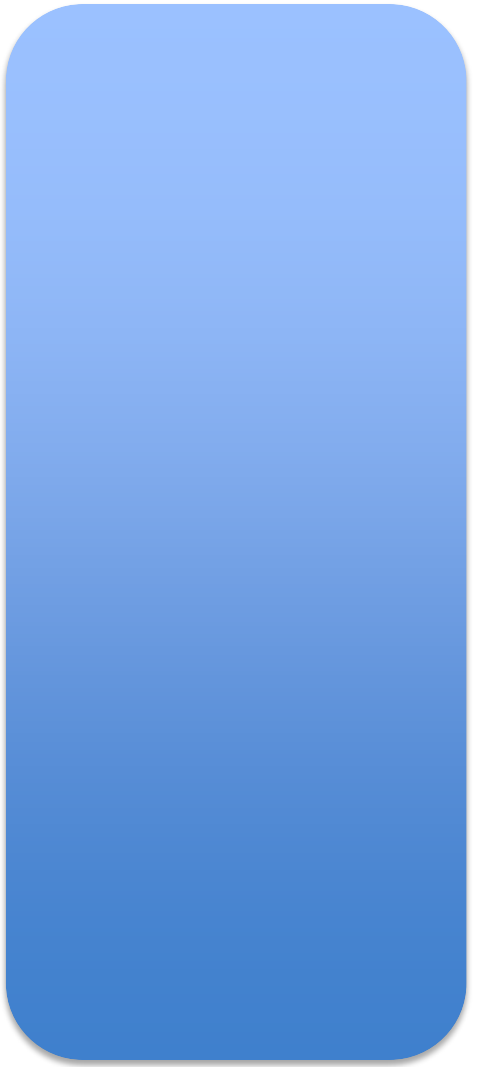
- David H. Sorkin, M.Ed.
- 45-Minute Conference Presentation

Why Strategic Planning Matters

- Increasing community needs
- Funding pressures
- Workforce challenges
- Demand for accountability
- Long-term sustainability

What is a Strategic Plan?

- Roadmap for organizational direction
- Supports decision making
- Aligns mission with resources
- Guides priorities



Strategic vs Operational Planning

- Strategic = where we are going
- Operational = how we get there
- Both are essential

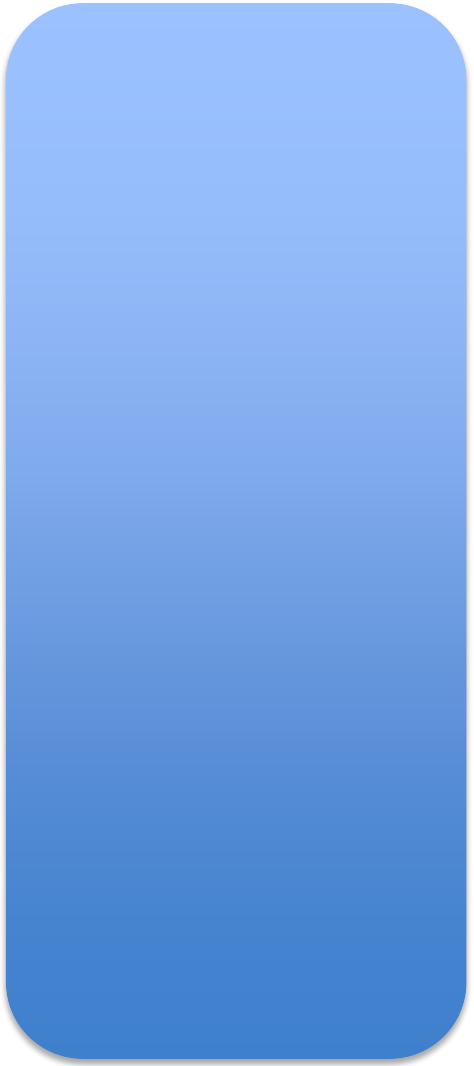
Purpose of Strategic Planning

- Organizational alignment
- Funding confidence
- Resource prioritization
- Accountability
- Growth

Mission

- Why the organization exists
- Should be clear and inspiring

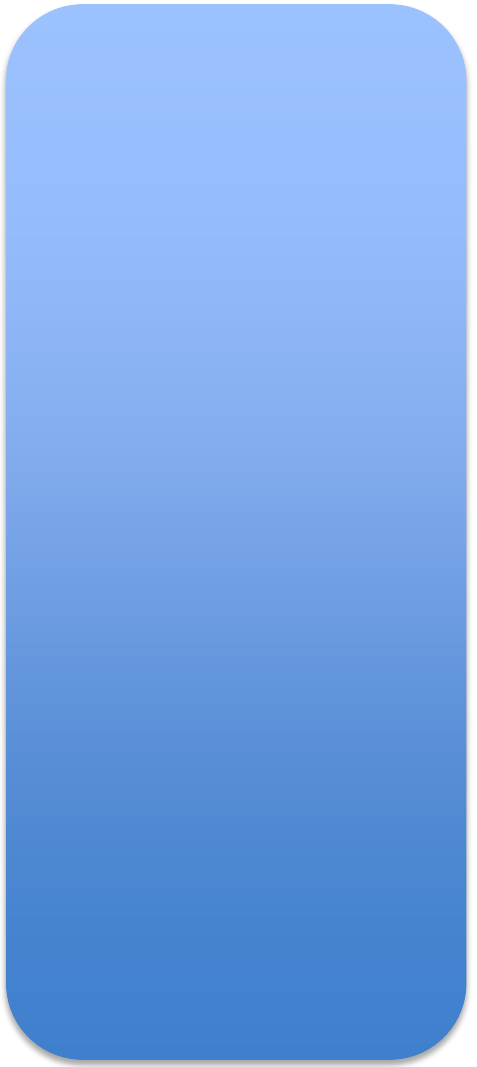
Example Mission Statement
To improve the quality of life in our community by providing innovative programs, compassionate services, and opportunities that empower individuals and families to thrive.



Vision

- Desired future state
- Guides long-term direction

Example Vision Statement
A community where every individual has the opportunity, resources, and support to reach their full potential.

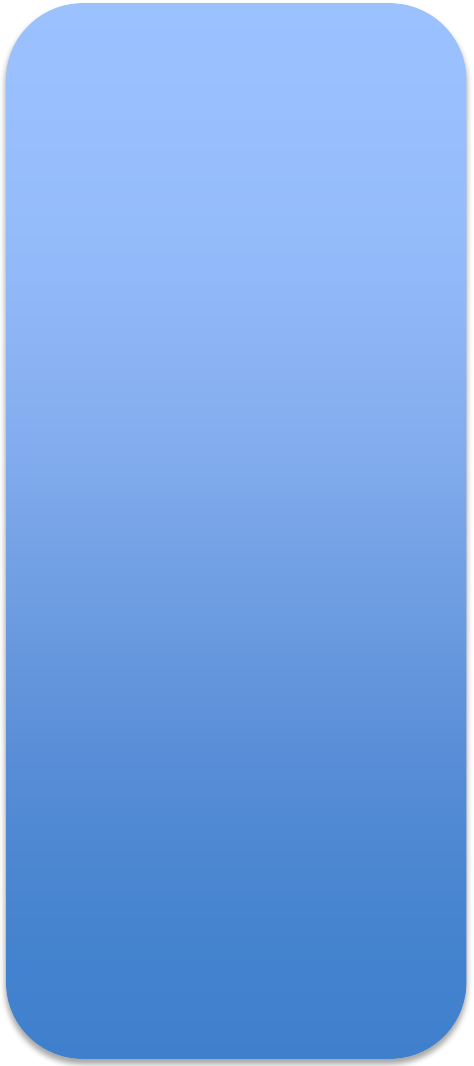


Values

- Culture and decision-making
- Behavioral expectations

Example Values Statement - Our Core Values

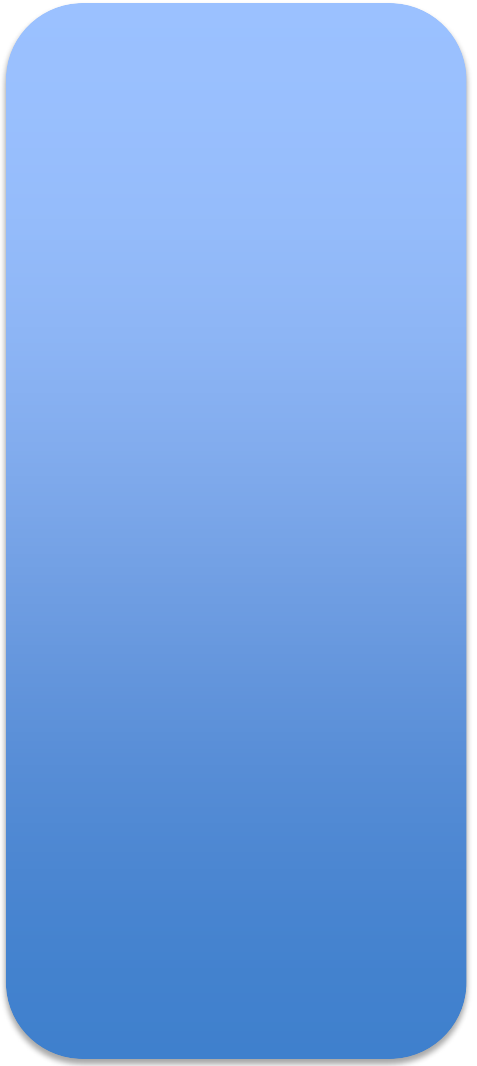
Integrity – We act honestly and ethically.
Compassion – We serve with empathy and respect.
Collaboration – We achieve more by working together.
Innovation – We embrace creative solutions.
Accountability – We measure results and honor our commitments.
Equity & Inclusion – We value every individual and promote belonging.



Mission explains **why** we exist. **Vision** describes **where** we aspire to be. **Values** define **how** we behave and make decisions. Together, they become the foundation for every strategic priority and organizational decision.

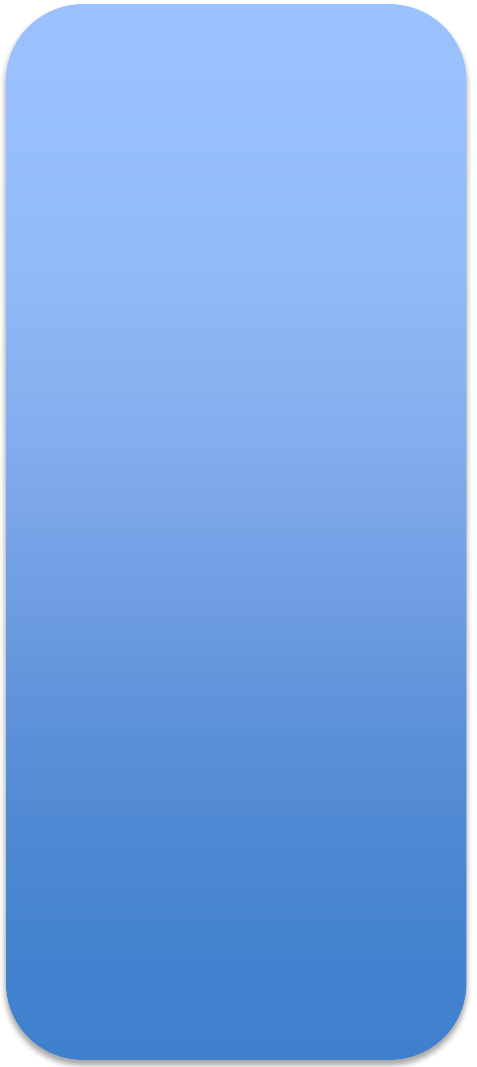
Environmental Assessment

- Internal assessment
- External assessment
- Data-informed planning



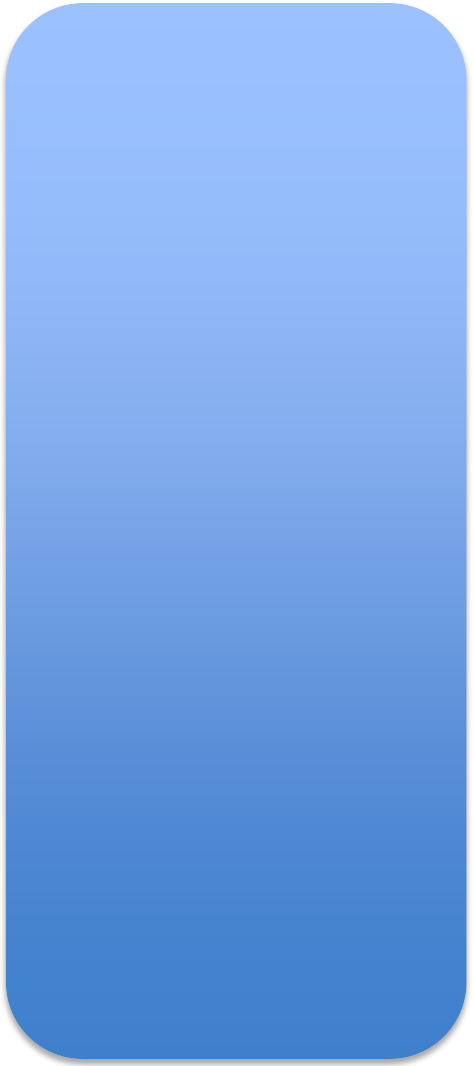
Internal Assessment

- Programs
- Governance
- Staff
- Finance
- Operations



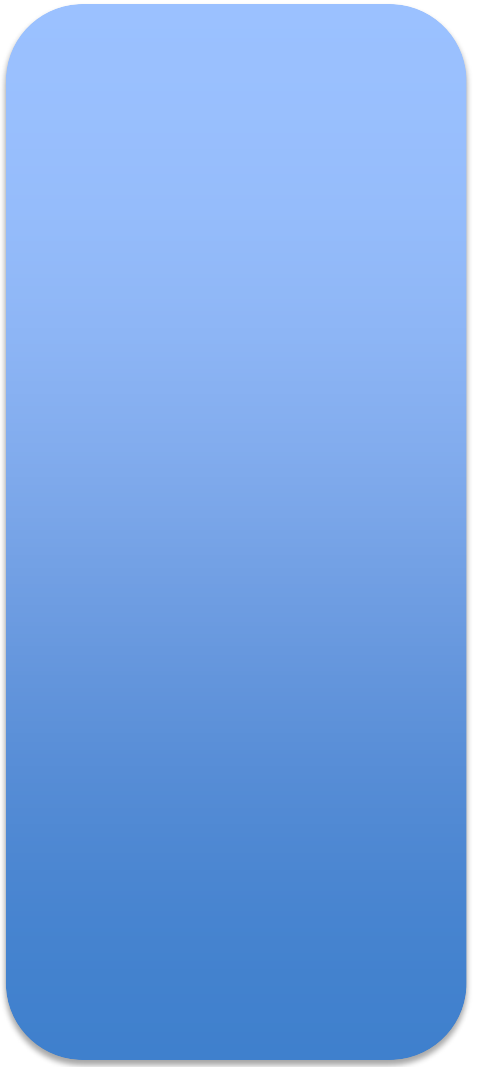
External Assessment

- Community needs
- Partners
- Funding
- Policy trends



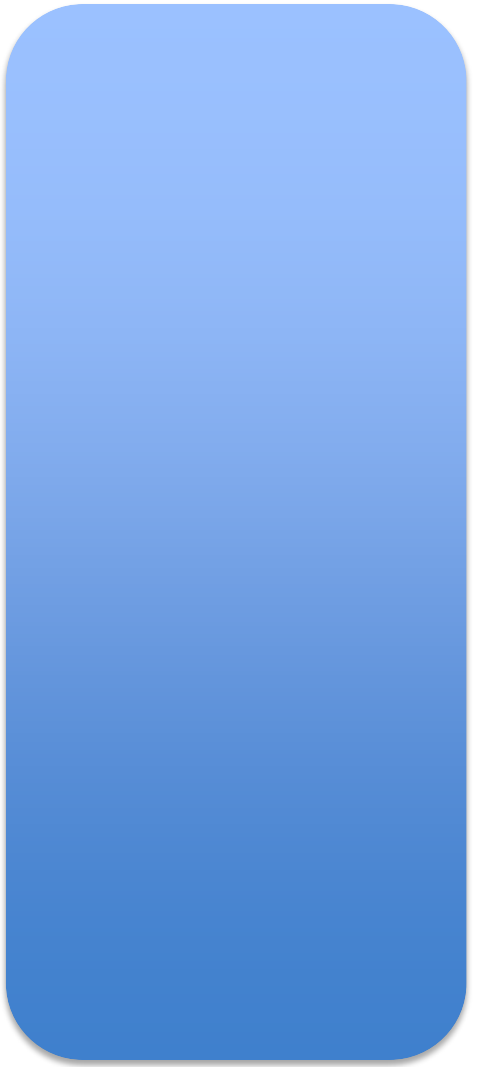
SWOT Analysis

- Strengths
- Weaknesses
- Opportunities
- Threats



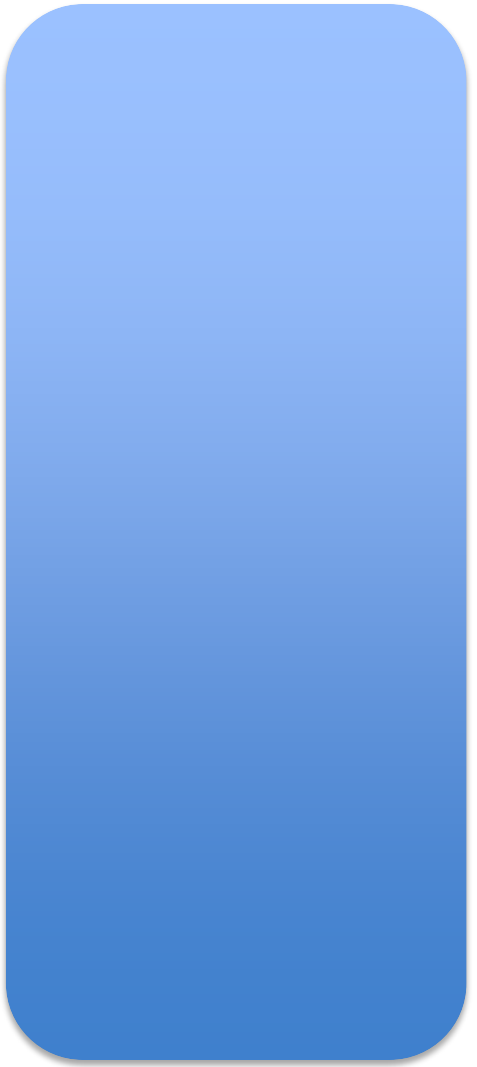
Strategic Priorities

- Program expansion
- Financial sustainability
- Workforce
- Governance
- Technology



Measurable Objectives

- SMART objectives
- Benchmarks
- Timelines
- Outcome measures



A **SMART objective** is a goal that is clearly defined, measurable, and achievable within a specific timeframe, making it easier to track progress and evaluate success.

SMART stands for:

- **S – Specific:** Clearly defines what will be accomplished.
- **M – Measurable:** Includes criteria to track progress and determine success.
- **A – Achievable:** Realistic and attainable with available resources.
- **R – Relevant:** Supports the organization's mission and strategic priorities.
- **T – Time-Bound:** Includes a target completion date.

Example

Strategic Goal: Increase community engagement.

SMART Objective:

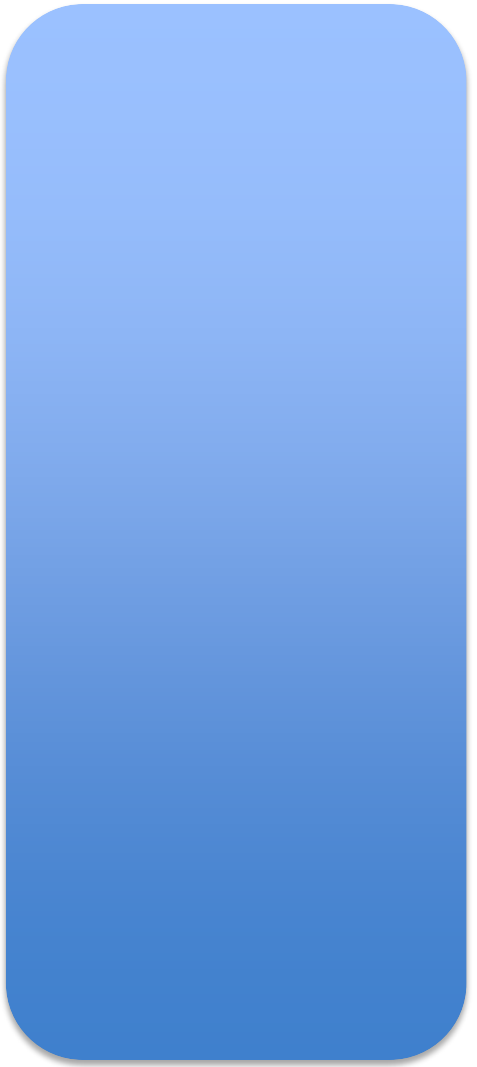
*Increase volunteer participation by **20%** by **June 30, 2027**, through expanded recruitment efforts, community outreach, and volunteer orientation sessions.*

This example is:

- **Specific** – Increase volunteer participation
- **Measurable** – By 20%
- **Achievable** – Through defined strategies
- **Relevant** – Supports community engagement
- **Time-Bound** – By June 30, 2027

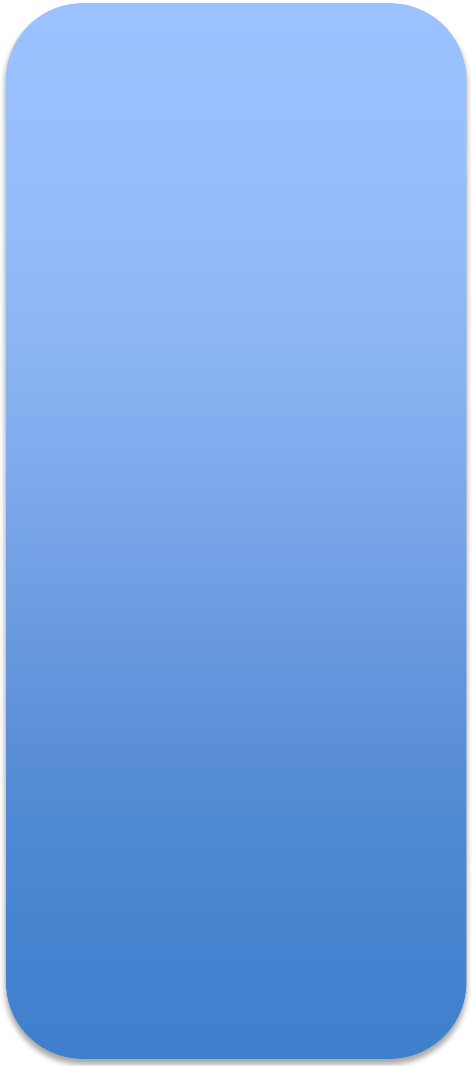
Preparing for the Process

- Readiness
- Leadership commitment
- Timeline
- Facilitator



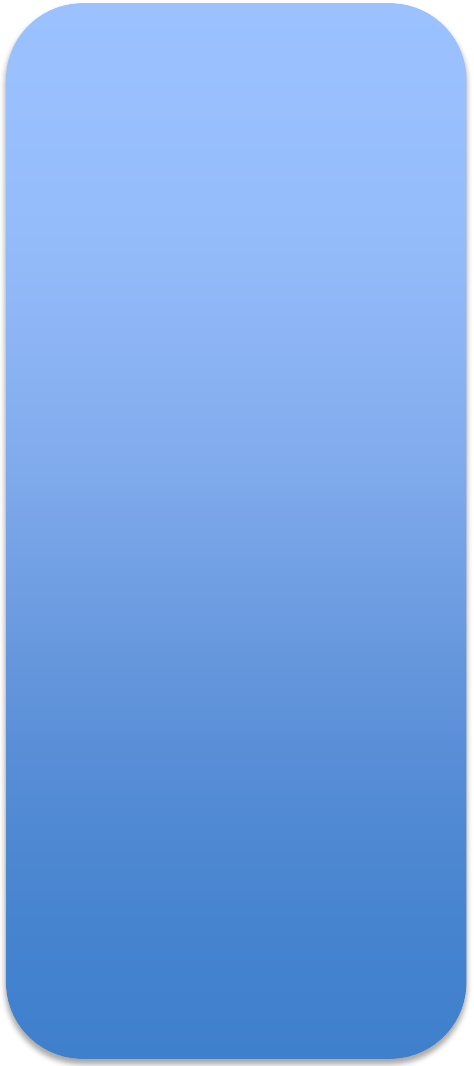
Stakeholder Engagement

- Board
- Staff
- Clients
- Funders
- Partners



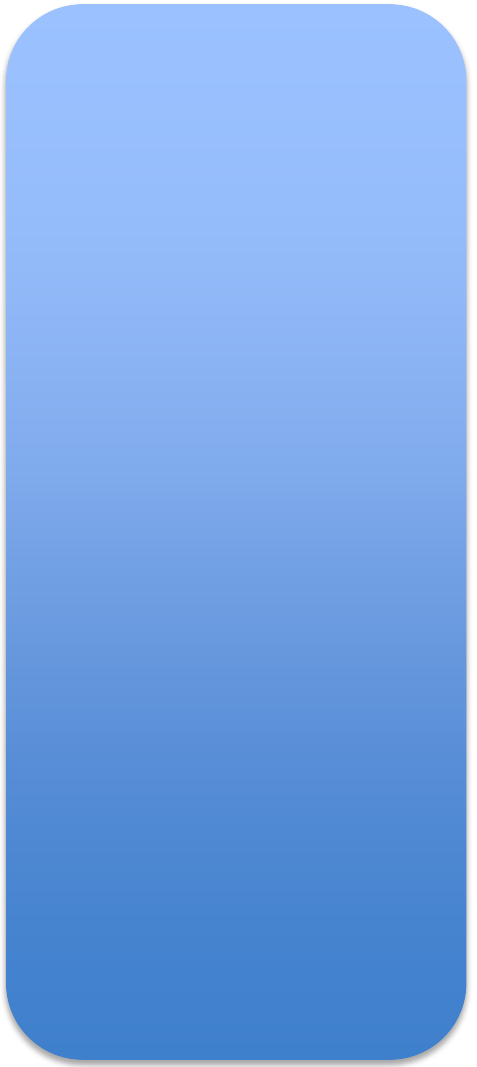
Planning Methods

- Retreats
- Interviews
- Surveys
- Focus Groups
- Community Forums



Building Buy-In

- Transparency
- Communication
- Inclusion
- Shared ownership

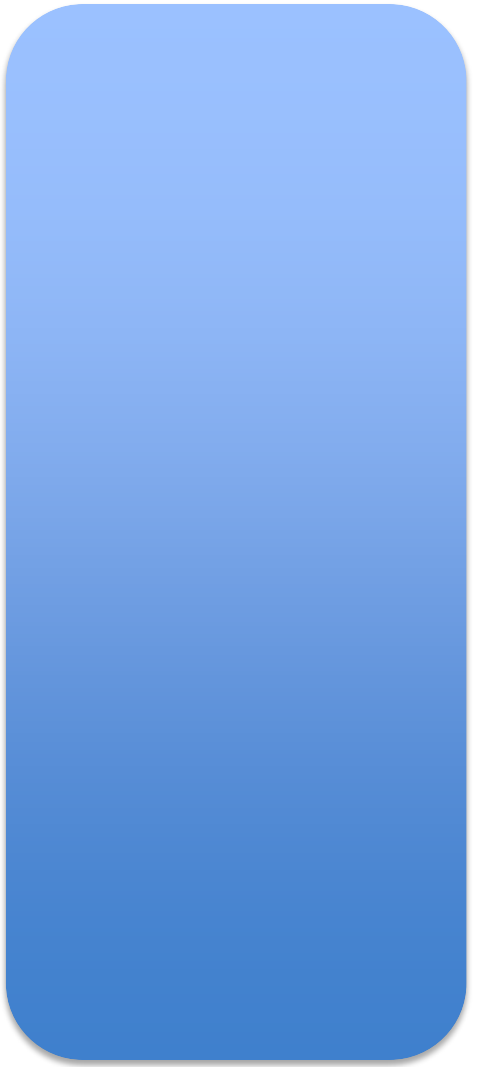


Common Challenges

- Resistance
- Lack of clarity
- Limited resources
- Unrealistic goals

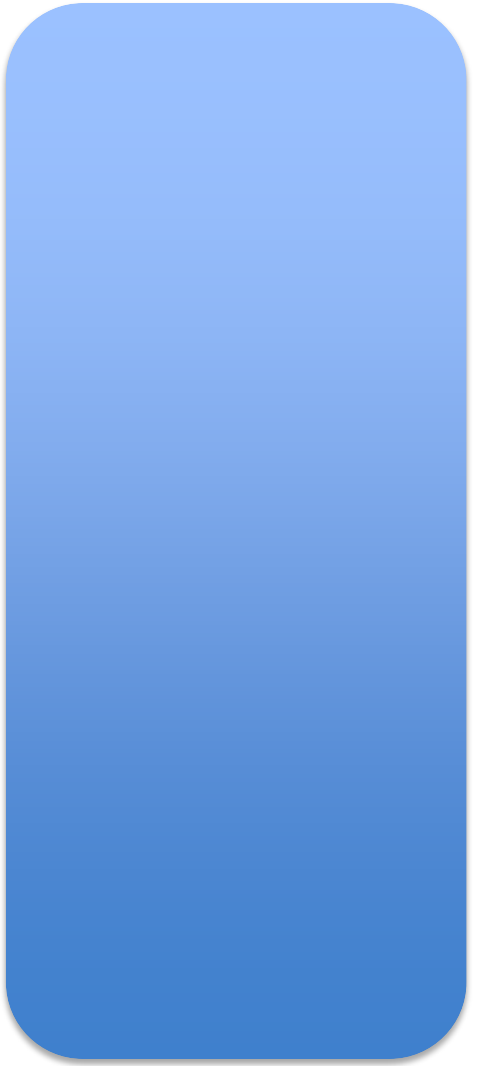
From Plan to Action

- Operationalize the plan
- Assign ownership
- Integrate into budgets



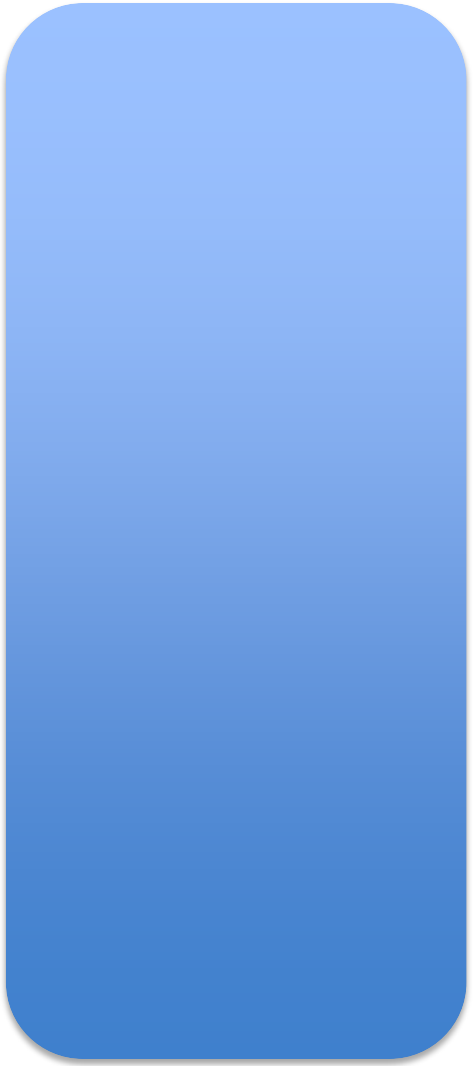
Board Responsibilities

- Governance
- Oversight
- Monitor progress
- Strategic accountability



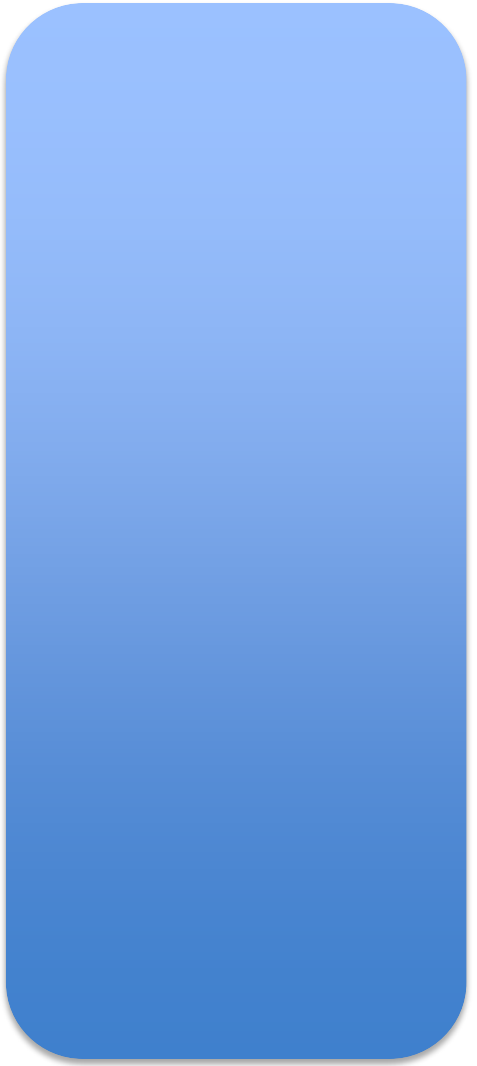
Executive Leadership

- Lead implementation
- Allocate resources
- Communicate priorities



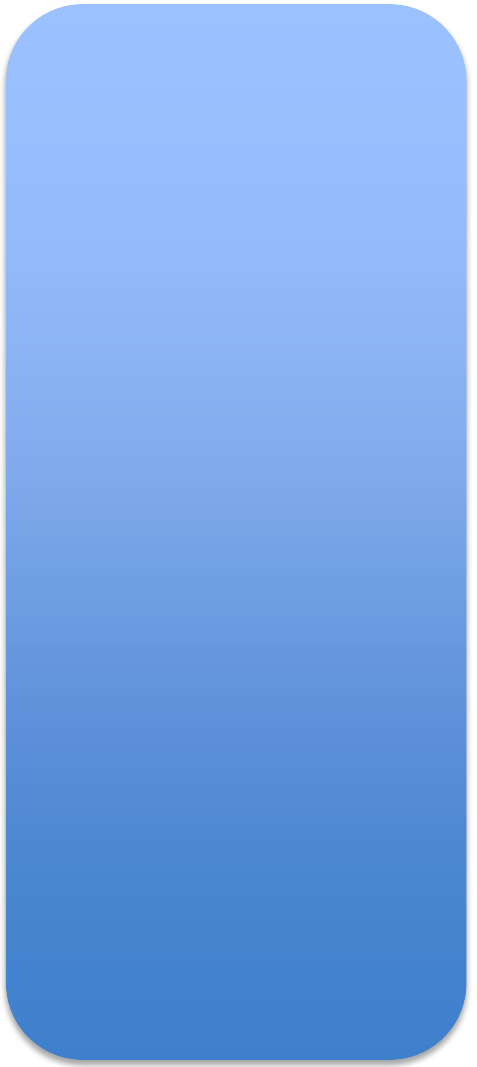
Management Responsibilities

- Execute work plans
- Track KPIs
- Collaborate across departments



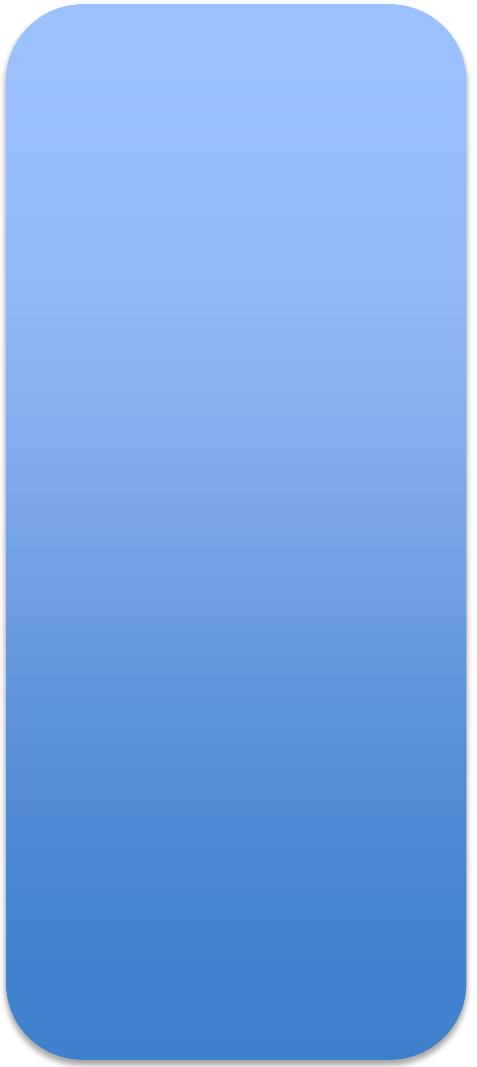
Implementation Tools

- Dashboards
- KPIs
- Quarterly reviews
- Progress reports



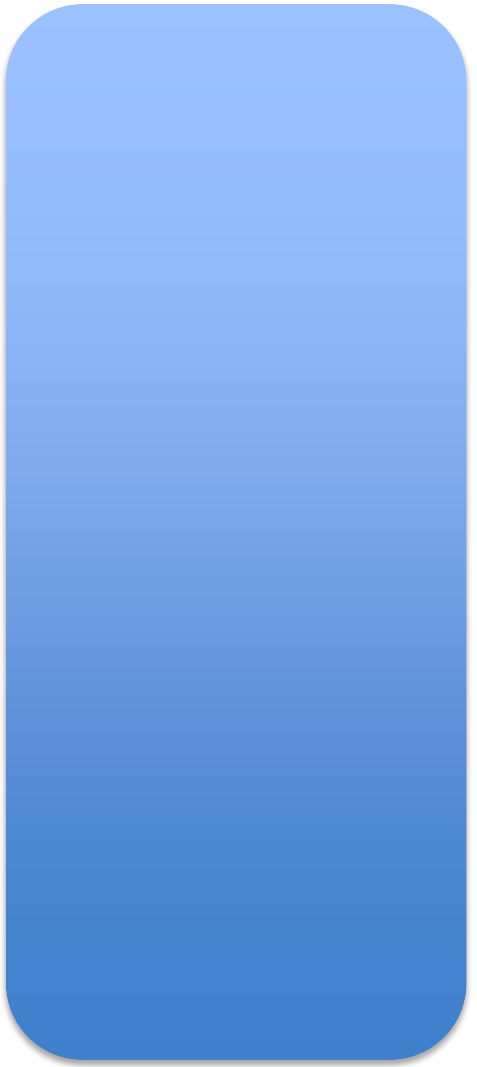
Building a Strategic Culture

- Living document
- Continuous improvement
- Regular evaluation



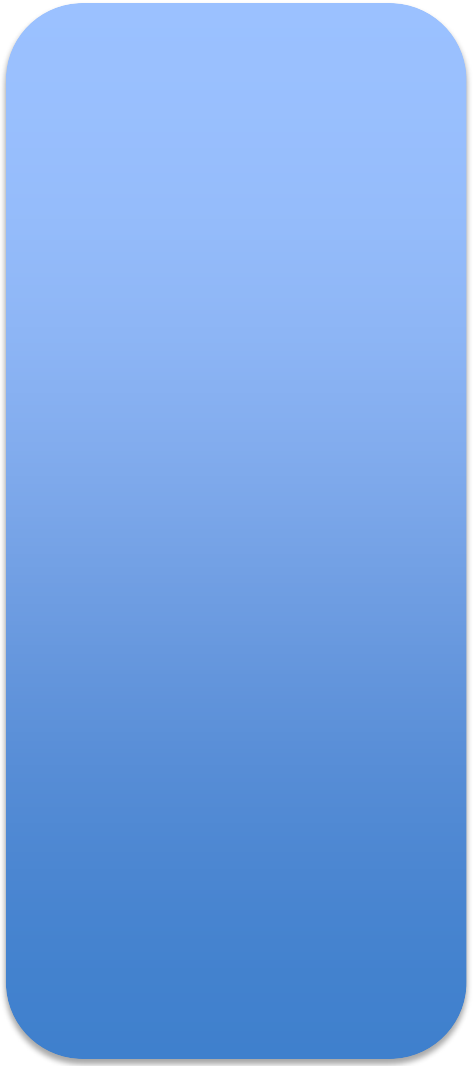
Measuring Success

- Financial metrics
- Program outcomes
- Community impact
- Annual reviews



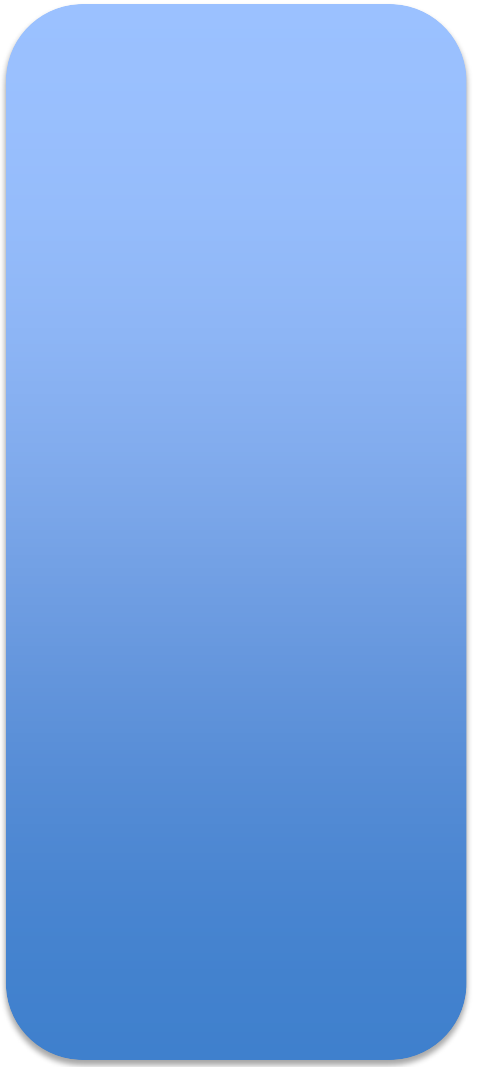
Avoiding Failure

- Don't shelve the plan
- Maintain accountability
- Communicate progress



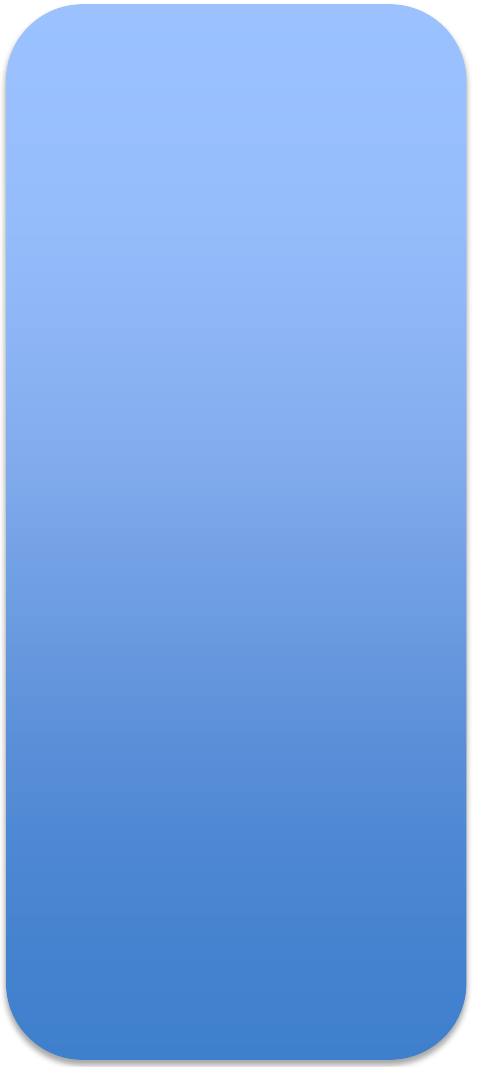
Keys to Success

- Leadership commitment
- Board engagement
- Realistic priorities
- Ongoing monitoring



Final Takeaways

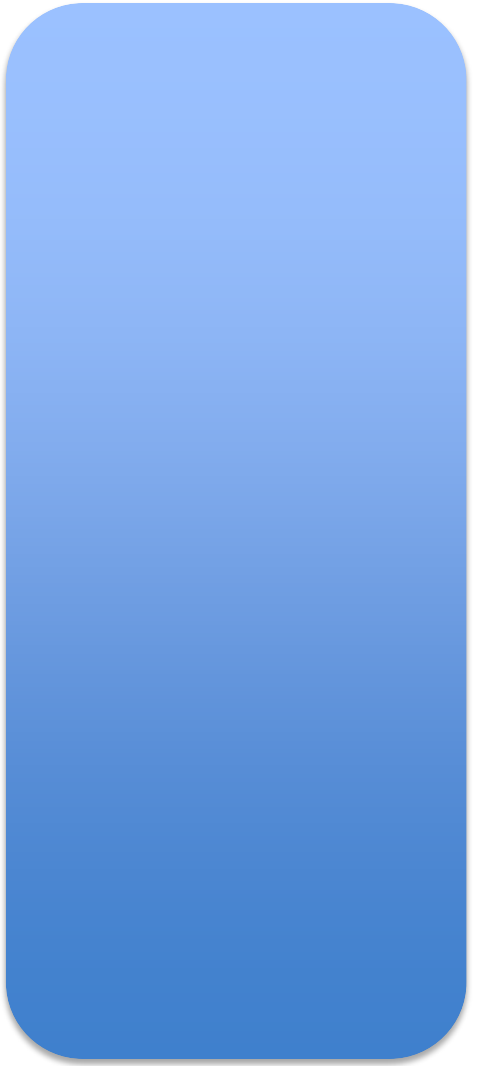
- Provides direction
- Builds alignment
- Strengthens sustainability
- Enhances mission impact



Discussion

- Is your strategic plan a living management tool?

- Questions & Answers



Thank You

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