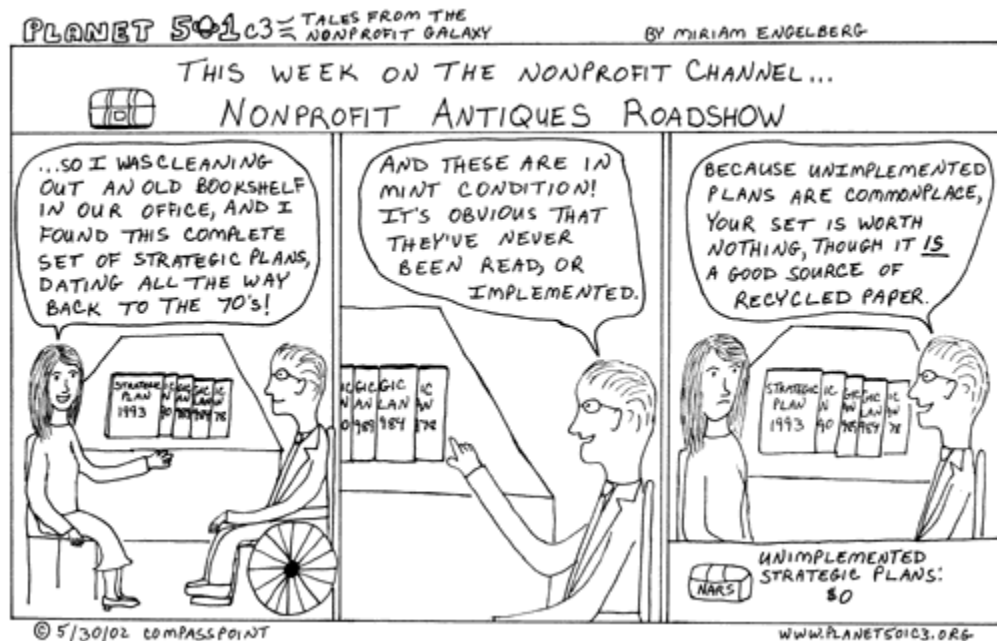


Strategic Plans



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Hopefully, this will not be your experience with strategic plans! Strategic plans are intended to be living documents that:

- Clearly define the organization's mission, vision and priorities.
- Provide a roadmap (or strategy) to achieve these.
- Identify the resources, individuals and timeline/s needed to carry out the plan.

We believe that strategic plans are critical organizational governance documents that guide staff, volunteers and the board of directors in their work. Strategic plans come in all shapes and sizes and should fit the organization based on its size and where it is in its development. **There is no one template that must be followed for a strategic plan.** There are a handful of components that should be part of any strategic plan and the purpose of this document is to outline those components. Exact terminology used is not critical; some people refer to objectives as strategies, or strategies as priorities, etc. Also, this is not intended to be a step by step guide to engaging in a strategic planning process—there are many great resources available on this topic and we have listed just a few at the end of this document. As always, staff is available to answer your questions as relates to strategic plans and your application to the NH Charitable Foundation.

Components of Strategic Plan

1. STRATEGIC ANALYSIS:

While it does not have to be submitted with your strategic plan for an application to the NH Charitable Foundation, many strategic plans begin with a strategic analysis of the external and internal environments in which the organization is operating:

External: Environmental Scan/Strengths, challenges, opportunities, threats

This process can be very extensive (community needs assessment with interviews, focus groups, and fax or e-mail surveys) or may be limited to a small number of informal discussions with clients, partners and stakeholders. Some sort of environmental analysis is helpful, but it is important to right-size such efforts. Components can include:

- Forces and trends in the broader community, political, economic, and social environment.
- Needs and status of current and potential clients and beneficiaries of the organizations' services and advocacy.
- Opportunities and challenges related to resources and funders.
- Actual and potential collaborators and competitors, including organizations which may serve the same target population or may seek funds from the same funding sources.

Internal: Organizational Analysis-Core Capacity Assessment Tool

Many organization use an organizational assessment tool that can be used to provide information to inform strategy development. These are typically questionnaires that ask staff and board members to consider various aspects of the organization and its development. Some organizational assessment tools are provided and analyzed by a third party for a fee; others are free.

- NH Center for Nonprofits - NonprofitNext (must be member of the Center for access): www.nhnonprofits.org
- National Council for Nonprofits - <https://www.councilofnonprofits.org/tools-resources/organizational-self-assessments>
- TCC Group – Core Capacity Assessment Tool - <https://www.tcccat.com/hc/en-us>

2. VISION (external):

Expresses a view of the future, what the world or the community would look like if everyone shared the organization's values. The impact of the work.

Example: We envision a world where no child is hungry.

3. MISSION:

The contribution the organization will makes to achieve this vision. The mission statement should be brief, just a few sentences and can include:

- Name, type of organization
- What the organization does
- For whom
- Where
- Can also include why, but shouldn't get too carried away on this. Keep it short!

Example: NH Legal Assistance's mission is to fulfill America's promise of equal justice by providing civil legal services to New Hampshire's poor, including education and empowerment, advice, representation, and advocacy for systemic change. We offer our clients high-quality civil legal aid to address the legal problems that affect their daily survival and most basic needs. These services range from simple legal information and advice to vigorous and thorough representation in all of New Hampshire's courts and before many of the local, state and federal agencies which play large roles in their lives. In providing legal services to the poor, NHLA helps ensure the legal system provides the fairness and justice that all New Hampshire residents deserve.

4. VALUES:

Organizational core values or operating principles – those beliefs or ideals that guide the organization. These values are shared by board, staff and volunteers, are strongly held and not easily changed. Identify perhaps four to six core values.

Example: As an organization and as individuals, we are:

- Committed to achieving results in pursuit of our vision and mission
- Collaborative because we are better together
- Accountable to the community, our constituents and each other
- Adaptive to change, because we take the long view

5. ORGANIZATIONAL VISION (internal focus):

Not all strategic plans include this component, but the process of determining an organizational vision can be helpful in goal-setting. What should the organization look like at the end of the strategic plan period? Typically written in future tense, this vision will describe the results that must be achieved and the characteristics the organization will need to possess in order to achieve those results. Described broadly, in terms of:

- mix of programs
- staff size and composition
- reputation or status inside and outside the primary target community
- key accomplishments
- relationships with stakeholders
- institutional development
- resources (amount, mix of sources, etc.)
- governance (including board size and composition)

Example: **We will have an expanded funding base that sustains current operations and supports anticipated program growth.**

6. GOALS

Goals are a series of statements which describe the organization in a specified number of years – assuming success. Sometimes it is easy to transform the vision (We will have expanded funding...) into a series of key action-oriented goals for the organization (To expand the agency funding base...).

Goals are typically big targets (achievable, but a stretch!) for organizational development. At this level they can be either qualitative or quantitative in nature, though often quantitative goals will more compellingly convey the clarity of the organization's plans, and also afford a meaningful yardstick for assessing achievements.

Examples:

Qualitative (no specific target): To expand the agency funding base to support anticipated growth in our programs and services.

Quantitative (more specific): To expand the agency funding base by at least \$50,000 to support an anticipated 30% growth in numbers served by our programs and services.

There should be both management or governance goals, and program goals. Some examples:

- **Program:** We will provide comprehensive educational services to youth from pre-school through grade three."
- **Resources:** "We will have a budget of \$3 million and a staff of 40."
- **Relationships:** "We will be represented on major coalitions in our program areas and on the Boards of at least three major mainstream organizations."
- **Institutional Development:** "We will own our own building, which will also have space for rent to other community-based organizations." Or "We will have a fully computerized financial management system, with all staff connected through a network."
- **Governance:** "The Board will take an active role in resource development, taking responsibility for one major special event each year." Or "The Board will establish three active working committees – Programs, Finance, and Resource Development – which will meet bimonthly and consistently have quorums."

7. STRATEGIES OR OBJECTIVES

Strategies are key approaches or methods to address each goal. The major emphasis should be on approaches and targets, not specific activities. Strategies are the bridge between the goals and the detailed activities staff, volunteers and board will carry out. Strategies chosen should respond to the environmental and organizational analysis--so that you build on strengths, resolve challenges, exploit opportunities, and avoid threats. The strategies should also include assignment of general responsibility (who will do what?) and time benchmarks for each objective.

Examples:

- **Generate \$50,000 more revenue from expanded programs**
- **Expand individual annual campaign giving by 10%**
- **Increase major donor giving by adding at least ten new major donors**
- **Increase corporate giving by attracting five new event sponsors**

8. WORKPLAN OR IMPLEMENTATION PLAN:

While it does not need to be submitted with the strategic plan for an application to the NH Charitable Foundation, many strategic plans end with a workplan or implementation plan. Here is where the organization identifies the specific activities that will be undertaken to realizing the strategies, attaining the goals and, ultimately, fulfilling mission. These are typically annual workplans that are revised each year based on progress made, and may in turn be the basis for development of individual staff work plans and personal accountability.

9. MONITORING:

Organizations should build in procedures for monitoring the strategic plan, and modifying strategies based on the progress toward strategic priorities and changes in the external environment or the organization. The strategic plan is to be used as a compass, but not an inflexible blueprint for action.

Resources:

NH Center for Nonprofits - NonprofitNext (must be member of the Center for access): www.nhnonprofits.org

The National Council of Nonprofits – Strategic Planning for Nonprofits: <https://www.councilofnonprofits.org/tools-resources/strategic-planning-nonprofits>

TCC Group – Ten Keys to Successful Strategic Planning for Nonprofit and Foundation Leaders: http://www.tccgrp.com/pdfs/per_brief_tenkeys.pdf

The Bridgespan Group – Strategic Planning: <https://www.bridgespan.org/insights/library/nonprofit-management-tools-and-trends/strategic-planning>

Stanford Social Innovation Review - The Strategic Plan is Dead, Long Live Strategy: https://ssir.org/articles/entry/the_strategic_plan_is_dead_long_live_strategy