NON-PROFIT LEADERSHIP SUMMIT

Strategic Planning

Presented by the
Center for Community Engagement

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Intake Survey

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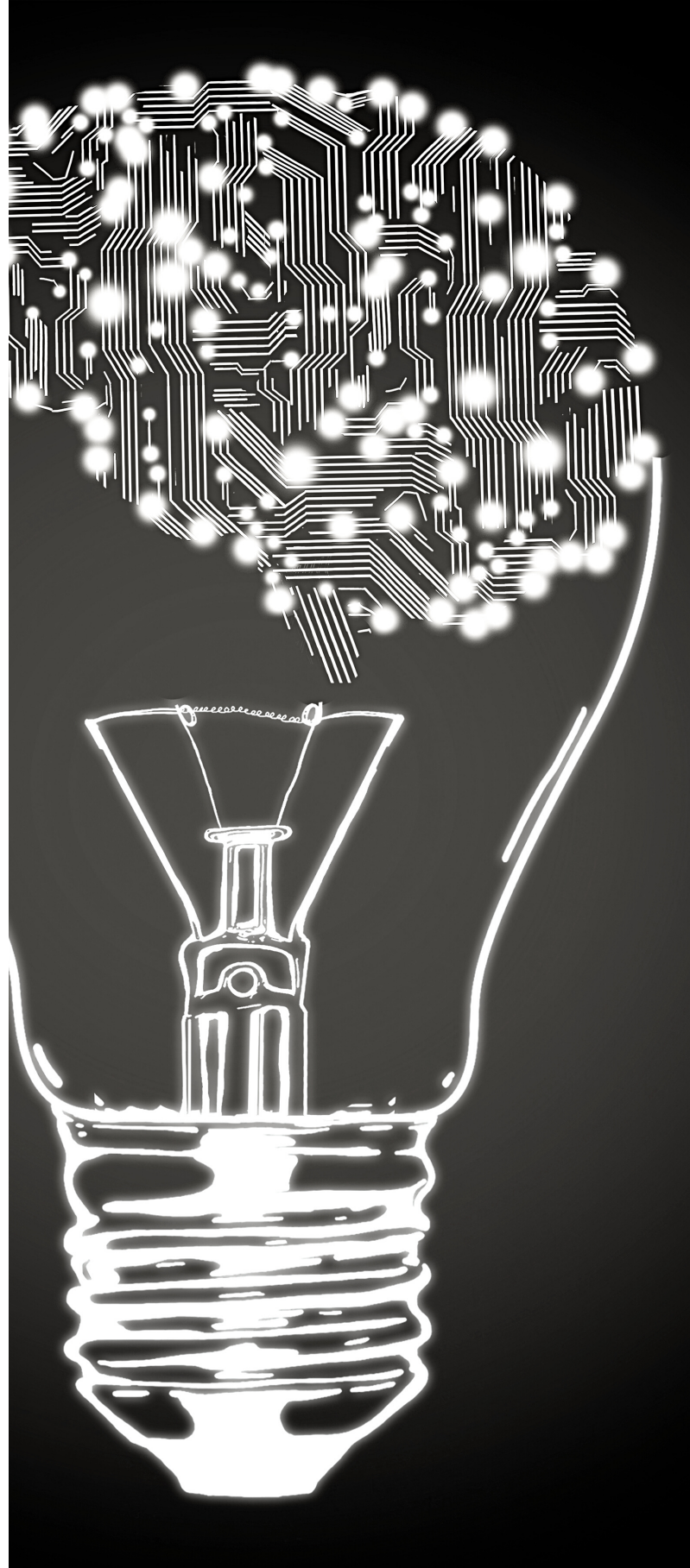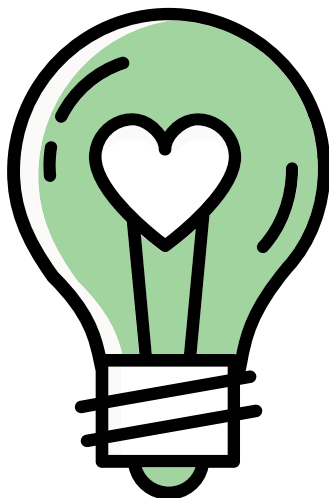
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WHAT IS A STRATEGIC PLAN?

Strategic planning is more than just setting goals for your organization.

After identifying goals, the strategic plan helps you lay out the steps necessary to accomplish those goals, the resources needed by your organization, and the system used to evaluate progress.

The strategic planning process culminates in a document that serves as your roadmap. While each organization is unique, the essential elements of a strategic plan include:

- your mission, vision, and value statements.
- your team.
- goals, tasks, and timelines needed to achieve these goals.
- the methods you will use to assess your progress.
- an analysis of your resources.
- the budget that will be implemented.

However, strategic planning isn't only about the written plan. It's about building consensus across your organization and community stakeholders that is focused and mission-driven so you can do as much good in your community as possible.

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TYPES OF PLANS

Standard - In the standard strategic plan model, you'll set a goal or set of goals. You'll then outline specific steps to meet those goals with an ideal timeline. This model is the most popular choice and the one we will discuss the most today.

Organic - As the name suggests, an organic strategic plan is less regimented because it relies on the organic flow of activity at your organization. Instead of coming up with all steps to reach your goal at once, you'll instead agree on one step that will help you get closer to your goal. Then, you'll reconvene to discuss and plan the next steps. This type of plan is great when you aren't sure what the next year at your organization might look like.

Issue-based - This strategic plan responds to a specific issue. It can also help you get back on the same page or reaffirm your vision if you find you've strayed from your mission.

Alignment - When your departments or team members aren't communicating effectively, an alignment model helps you focus on streamlining the way your team communicates.

Real-time - This model is great for responding to a crisis in real time. A real-time plan responds to the crisis by taking things one step at a time. It involves regular meetings with the leaders in your organization to discuss the next steps, evaluate the success of past steps, and reaffirm your goals.

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STRATEGIC PRIORITIES

Your strategic priorities are unique to your organization. They are a clear set of priorities that help create your organization's core culture and purpose. Your strategic priorities make up the overarching framework that guides the work your organization does in the community.

Typically, strategic priorities are made up of three to five core themes that are the bridge between the long-term aspirations of your mission and immediate needs of the community. These three to five core themes become the umbrellas under which all your goals will fall.

UNITED WAY

Vision: To be a united foundation that guides and transforms communities.
Mission: To strengthen the organized capacity of our community, ensuring maximum support to everyone in need.

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Mission: To provide an excellent education in a creative community where learning and values meet, and to foster in students the qualities of mind and heart that will prepare them to reach their full potential as informed citizens of local communities and the world.

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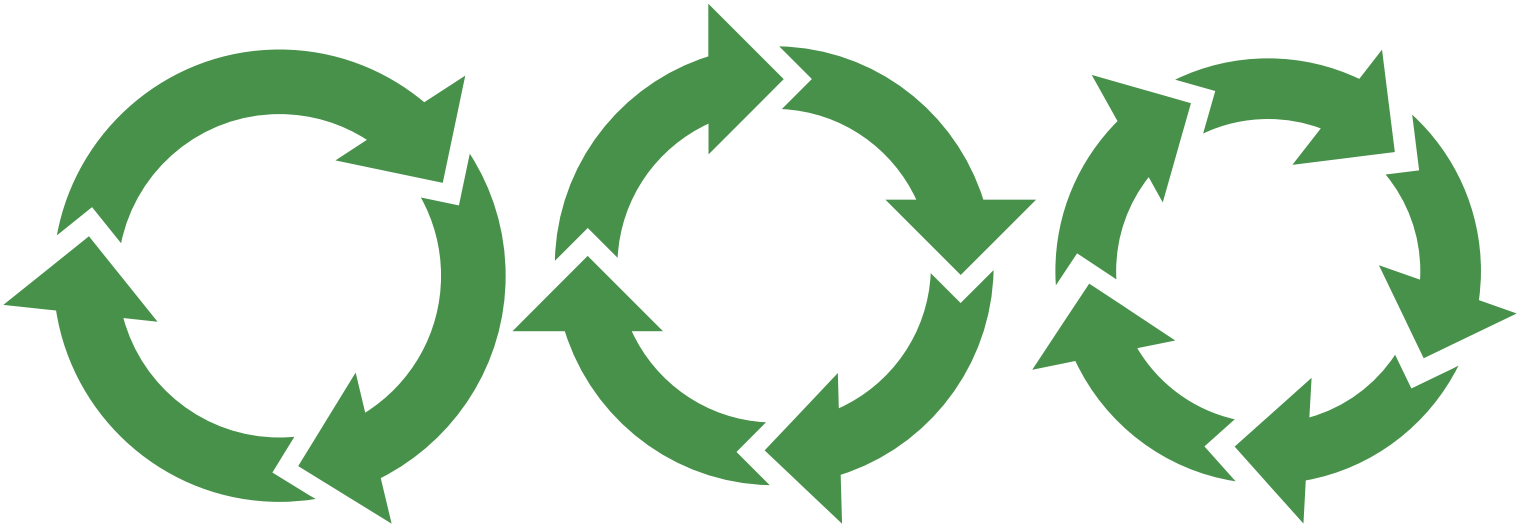
STRATEGIC PRIORITIES

WHAT IS THE KEY ISSUE YOU ARE TRYING TO ADDRESS?

WHY IS IT IMPORTANT?

WHO DOES IT AFFECT?

WHAT FACTORS SHAPE IT?

WHAT EDVIDENCE DO YOU HAVE?

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ASSEMBLING YOUR TEAM

One of the first things you will need to do is determine who will be involved in the development of your organization's strategic plan. These can be broken down into 4 types of people.

- Those who will be implementing the plan. This category includes management, staff, and volunteers.
- Those who will be affected by the plan. This category includes clients, patients, or other people that use your organization's services.
- Those who will monitor the plan's implementation. This category typically includes organization leadership but could also include outside consultants brought in for the purpose of executing a portion of the plan.
- Others who can contribute to the plan's development. This category can include people that are tapped into community needs such as community activists or people helping to fund the projects defined by the strategic plan.

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YOUR TEAM

WHO WILL BE IMPLEMENTING THE PLAN?	**WHO WILL BE AFFECTED BY THE PLAN?**
WHO WILL MONITOR THE PLAN'S IMPLEMENTATION?	**WHO ELSE CAN CONTRIBUTE TO THE PLAN'S DEVELOPMENT?**

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LAYING OUT YOUR CATEGORIES

Your organization's strategic plan will be as unique as your organization. That means that there is no easy answer to what sections and categories your plan will have. In general, your categories will fall into one of two sections, administrative and programs/services.

The administrative section will contain things like staffing, marketing, and infrastructure goals. Here are a few possibilities of categories your plan might need:

- Staffing and Payroll
    - Paid
    - Volunteer
- Major Expenditures
    - Building (new or renovations)
    - Vehicles
- Marketing
    - Social Media
    - Website
    - Newsletter Email
    - Media Exposure
- Fundraising
    - Donations/Donor Relations
    - Grants
    - Event Sponsorships
- Operational
    - Updating Bylaws/Mission
    - Establishing or Updating Operational Practices

The programs and services section will contain the things you DO. What programs do you run? What services do you offer your clients? The way these goals are organized will depend on the way your business/operational plan is structured. Here are a few ways you might decide to set up your programs and services section:

- Virtual vs In-Person
- Broken Down by Age of Populations Served
- Types of Services
- Established Departments

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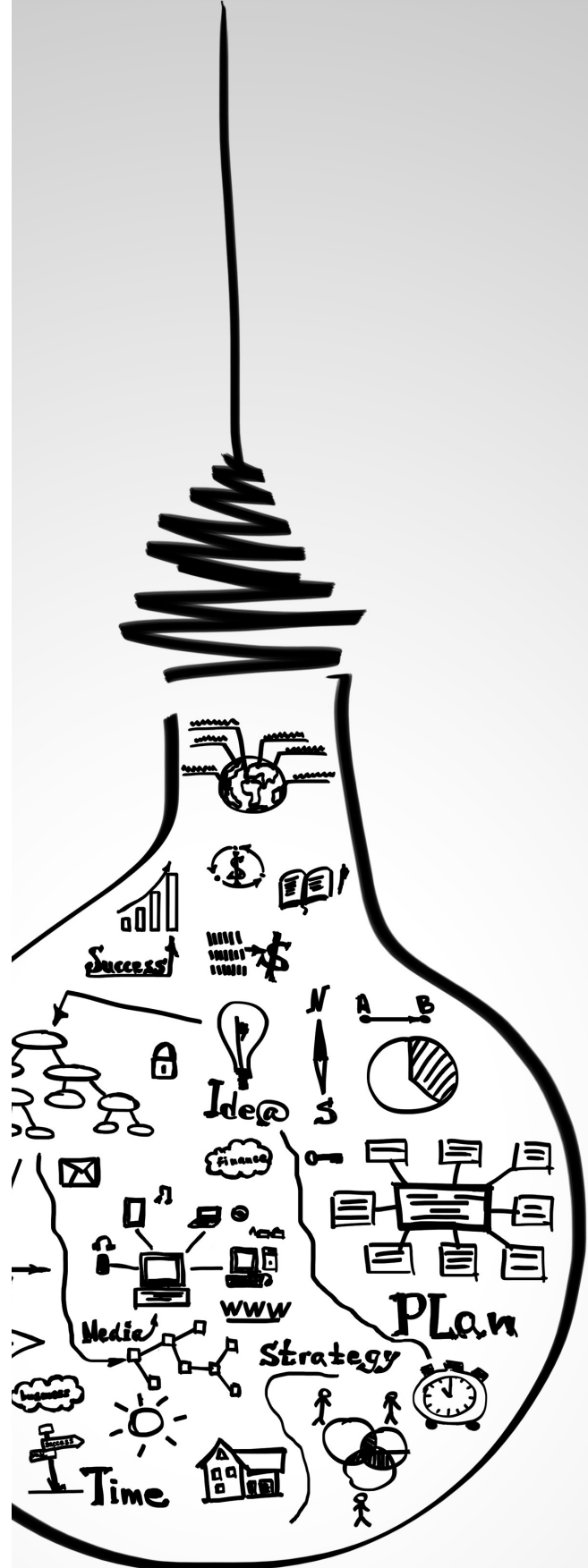
PLAN CATEGORIES

ADMINISTRATIVE

Strategic Plan Categories

PROGRAMS AND SERVICES

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SMART GOALS

Goals are a part of every aspect of business and life. They provide a sense of direction, motivation, clear focus, and clarify importance. By setting goals, you are providing your organization with a target to aim for.

One way to do goal setting is by using SMART goals. Smart goals are **S**pecific, **M**easurable, **A**ttainable, **R**elevant, and **T**ime based.

A SMART goal helps you focus your efforts and stay on track by answering the following questions:

- What do you want to do?
- How will you know when you've reached it?
- Is it in your power to accomplish it?
- When exactly do you want to accomplish it?
- Can you realistically achieve it in the time allotted?

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S.M.A.R.T. GOALS

<u>Specific</u>

When setting your goal you want to clarify the overall context.
- What are you hoping to achieve?
- What is your overall goal?
- Who will benefit from the initiative?

<u>Measurable</u>

Quantifying your goals makes it easier to track progress and know when you've reached the finish line. Not setting measurable goals can also cause everyone to be on a completely different page. An organization should be able to track progress and measure success.

To set measurable goals, make sure you:
- know exactly what will be measured.
- who will measure it.
- how will they measure it.

Setting measurable goals motivates the team and it paints a clearer picture of where you're at.

<u>Attainable</u>

As a nonprofit, you should strive to set goals that stretch you and are ambitious enough to challenge you. However, those goals should not be unrealistic and unattainable. It's quite easy to get carried away when setting goals and set goals that ultimately can't and won't be met, especially when motivated by a desire to do good. Goals that are too easy to achieve aren't satisfying or motivating, but goals that are too difficult to achieve can make people feel inadequate.

To understand what's achievable and feasible for your organization, consider:
- the success of your previous goals.
- the budget allocation for the goal.
- the time your organization can commit to the project.
- other resources you can commit (e.g. employees, volunteers).

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Relevant

Before you invest any resources in achieving a strategic goal, it's crucial to ensure that your goals are relevant to your organization's mission and vision. Ask yourself:

- Does this goal contribute to my mission and vision?
- Is this going to positively impact my intended beneficiaries?
- Does the goal relate to my yearly strategy?
- What is the return on investment in terms of impact?

Get very clear on the relevance of your goals before starting any activities. This also helps you establish the "why" – and when there's a "why", everything will flow more smoothly.

Time-based

Every successful goal should have a beginning and an end. Projects that stretch out can become burdensome and unmotivating for both staff and volunteers. If a goal isn't time-based, you can put it off indefinitely. Having a timeline also helps with tracking progress. For example, you could be one month into a two-month goal, but you only completed 15% of the tasks. This informs your decision-making and allows you to re-plan and think of ways you can increase your efforts and meet the end goal in time.

Putting it all together

Your goal statement should start with the time frame, and then be followed by what the goal is, how it will be measured, and the reason the goal is being established.

Example: By the end of the calendar year, the CCE will hold a NPLS on Strategic Planning for 10 Community Partners. Based on feedback from partners, Strategic Planning assistance is needed by several area organizations and Stetson has the resources to provide a workshop on Strategic Planning.

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SMART GOALS

GOAL NAME

SPECIFIC

MEASURABLE

ATTAINABLE

RELEVANT

TIME BASED

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GOAL NAME

2024 Q1	2024 Q2	2024 Q3	2024 Q4	2025	2026

SMART GOALS

GOAL NAME	

SPECIFIC	MEASURABLE

ATTAINABLE	RELEVANT

TIME BASED	

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GOAL NAME

2024 Q1	2024 Q2	2024 Q3	2024 Q4	2025	2026

SMART GOALS

GOAL NAME

SPECIFIC	MEASURABLE

ATTAINABLE	RELEVANT

TIME BASED

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GOAL NAME

2024 Q1	2024 Q2	2024 Q3	2024 Q4	2025	2026

SMART GOALS

GOAL NAME

SPECIFIC	MEASURABLE

ATTAINABLE	RELEVANT

TIME BASED

GOAL NAME

2024 Q1	2024 Q2	2024 Q3	2024 Q4	2025	2026

SMART GOALS

GOAL NAME

SPECIFIC	MEASURABLE

ATTAINABLE	RELEVANT

TIME BASED

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GOAL NAME

2024 Q1	2024 Q2	2024 Q3	2024 Q4	2025	2026

CHARTING YOUR PATH

Now that you have set your goals, how will you achieve them?

This is where the goal planning worksheet comes in. With the goal planning worksheet your team can break down each goal into smaller steps. This process can be particularly helpful with goals that seem daunting to the organization or those that have longer timeframes. The tasks you outline on your planning worksheet should be actionable, direct, and clear. You should also clarify who is responsible for completing them, the deadline each task needs to be completed by, and how you will know when the task is complete.

For goals that have a longer timeframe, especially those that are longer than a year, it can be helpful to break down the first year into months or quarters but leave the tasks with a deadline over a year out vaguer; holding off setting those timeframes until closer to the deadline. This is also a good time to adjust the timelines set on your SMART goals if you discover you need more time to complete the required steps or if you had less work to do to reach your goal than you thought.

Goals	2022 Q2	2022 Q3	2022 Q4	2023	2024	2025
Example: By the end of Y2, Support Volusia will create a database of Volusia County Resources and build and maintain an online platform to make that data available to area Community Service Providers.	determine team that will collect and manage data - AM	Convert existing data from AmeriCorps VISTA/Stetson to database format - AM	continue collecting data for missing resources - AM, Aimee, Desiree, Helen	create print copy of database (to be updated annually) for local points of I&R - AM, Stetson	Brainstorm list of "how to" guides and "issue area" guides and set priority order	Create a minimum of two "how to" or "issue area" guides from priority list
	research other databases - AM	audit existing database, determine missing resources and make any corrections - AM, Aimee, Desiree	launch database online and determine marketing plan for diseminating database - AM	schedule annual audit and determine maintenance plan for database		
		begin collecting data for missing resources - AM, Aimee, Desiree, Helen				

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ASSESSMENT

Assessing the effectiveness of your strategic plan is crucial for making sure your organization is on target to reach its goals. Assessment provides valuable insights that let you make informed decisions and adjust your plan if necessary.

How will you measure your progress?

Key performance indicators, or KPIs, are metrics that help you measure progress. They should be specific, measurable, and aligned with your goals. These could be financial metrics such as donor funding or how well you are staying on budget; or non-financial metrics such as the number of clients served or the level of stakeholder engagement. Establishing realistic and achievable targets for each KPI will help you measure progress and assess whether you are on track to achieve your goals.

Review and analyze KPI data with your team.

Checking in with your team regularly to analyze the data to identify trends, patterns, and areas in need of improvement will allow you to adjust your strategic plan as needed. Informal check-ins during monthly leadership meetings can be a good way to address urgent issues that may come up. More formal quarterly and annual meetings can be used to delve into more specific details of progress that has been made.

Continuously improve.

Assessing the progress of your goals regularly allows your organization to react in real time and continuously improve your strategic plan. If problem areas are identified, regular assessment gives your team an opportunity to change tactics or shift resources to achieve better outcomes.

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KPIs FOR NON-PROFITS

This is not an exhaustive list of the options available to your organization, but you can use the following ideas to get your team started.

Fundraising KPIs

○ Donor & Donation Growth - Look at the growth rate in donors and donations expressed as a percentage.

○ Donor Retention Rate - Track donors who have given more than once.

○ Donation Conversions by Channel - Track what inspired donors to take action. Do this with each organic, social, email, referral, ad, channel, and call to action (CTA).

Marketing & Communication KPIs

○ Website Page Views - Track the number of times users view a webpage, including repeat viewings. The reason this is important is because the more people that view your webpage, the greater chance they have of clicking on your call to action. You will want to have more views of your webpage than viewers, which means they have returned to the webpage numerous times. You will also want to track the time viewers spend on your website - the longer they stay, the better.

○ Email Open & Click-Through Rates - Track the number of people who open your emails. Your email marketing provider should automatically track this for you. If you have a low open rate, you may want to try new subject lines.

○ Amplification, Applause, & Conversion Rates - Track the number of social media responses, including likes, retweets, and comments. Specifically look for content that inspired conversation. Each social media channel tracks these analytics for you, or you can sign up for a social monitoring service that will aggregate these analytics.

Program KPIs

○ Number of Beneficiaries Served & Program Attendance - Track the number of people impacted by your programs.

○ Beneficiary Satisfaction Rate - Monitor the satisfaction of those impacted by your programs. The simplest way to determine satisfaction rate is by asking your beneficiaries, "How do you feel?" or "How satisfied are you with the program?" If you want to put a number to this, use a brief survey and ask beneficiaries to rate their satisfaction on a number scale.

○ Pre & Post-Program Scores - Measure changes in knowledge, skills, abilities, or behaviors of beneficiaries. These are commonly referred to as outcomes. These KPIs can be measured by a test or questionnaire.

Human Resources KPIs

◯ Employee/Volunteer Retention Rate - Track the rate in which employees and volunteers leave the organization.

◯ Employee/Volunteer Satisfaction Rate - Monitor employee and volunteer satisfaction with their job and the organization. You can ask questions like "On a scale of 1 – 10, how likely would you be to refer a friend or family to work with us?" Another way is to host informal chats with employees and volunteers to gauge their satisfaction.

◯ Percentage of Performance Goals Met - Monitor the rate employees and volunteers are meeting their goals.
   • Percentage of tasks completed.
   • Percentage of goals abandoned or found unattainable.

◯ Absenteeism Rate - Monitor employee and volunteer motivation by tracking how often people are missing work or volunteer shifts.

Financial KPIs

◯ Year-Over-Year Growth - Tracks the percent your revenue or budget increased in one year compared to the previous year. You must measure in percentages to get the true impact of the increase.

◯ Operating Surplus/Deficit - Understand if your financial resources are sufficient. The aim is to have an operating reserve to cover at least three months of annual expenses.

◯ Liquid Unrestricted Net Assets (LUNA) - Measures the portion of unrestricted net assets that can be converted to cash relatively easily. These funds can be used to supply working capital, guard against downturns, and pursue new opportunities.

◯ Program Efficiency - Compare program expenses against total expenses to see how efficient your nonprofit is in fulfilling its mission.

NOTES

ANALYZING YOUR RESOURCES

As your organization grows, you can sometimes lose sight of how your organization has excelled or fallen short in certain areas. Taking time to examine your strengths and weaknesses can help your organization gain insight on areas that need improvement, ways to leverage your strengths better, and prepare you for future projects.

A common way to provide a clear view of the issues your organization is dealing with is through a SWOT Analysis. SWOT stands for Strengths, Weaknesses, Opportunities, and Threats. A SWOT analysis is a way for your organization to take inventory of internal and external forces that can have both positive and negative impacts on the organization's ability to achieve its mission and helps gives you and your stakeholders an unbiased view of what can be accomplished.

How to Do a SWOT Analysis?

A SWOT analysis includes several steps. As you work through this process, do your best to be specific and limit biases that could affect the results. The best way to begin your SWOT analysis is by asking questions and encouraging your team to be as honest as possible about the answers.

As you answer these questions, list everything that could make a difference. This is where getting more people involved can really help. Take time to interview staff, board members, volunteers, donors, and those receiving your services. Ask the same questions to different groups of people. That will give you a broader view of how the community, your employees, volunteers, and board members see your organization.

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Strengths

Things that your organization does particularly well or distinguishes you from other organizations.

- What are you best at?
- What programs and activities do people like about your organization?
- How does your organization stand out?
- Which assets do you own (equipment, property, cash, investments, workforce)?
- What drove your success in the past?
- What motivates your passionate volunteer base?

Weaknesses

Things that you could improve and practices you should avoid.

- What are the obvious areas of concern?
- What have stakeholders mentioned as a problem?
- Where do your knowledge and resources lack?
- Did you fail to meet fundraising goals?
- Do you think you're reaching enough people?

Opportunities

Openings or chances for something positive to happen

- Are there any trends your organization can piggyback on?
- How can you use your strengths to stand out?
- Are there any other business opportunities you could take advantage of?
- What other community organizations could you partner with?
- Are there any new opportunities in your community? Is there an option to move?
- How can you share your nonprofit's story with the world?
- How can you increase your revenue from fundraising events? What add-ons will work the best?

Threats

Anything that can negatively affect your organization from the outside.

- How do other organizations address a problem?
- What makes your organization vulnerable?
- What trends do you not have the resources to address?
- How could politics or the economy affect your growth?
- What is the reason you lost a key staff or a passionate volunteer to another organization?

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SWOT ANALYSIS

STRENGTHS positive/internal	WEAKNESSES negative/internal
OPPORTUNITIES positive/external	THREATS negative/internal

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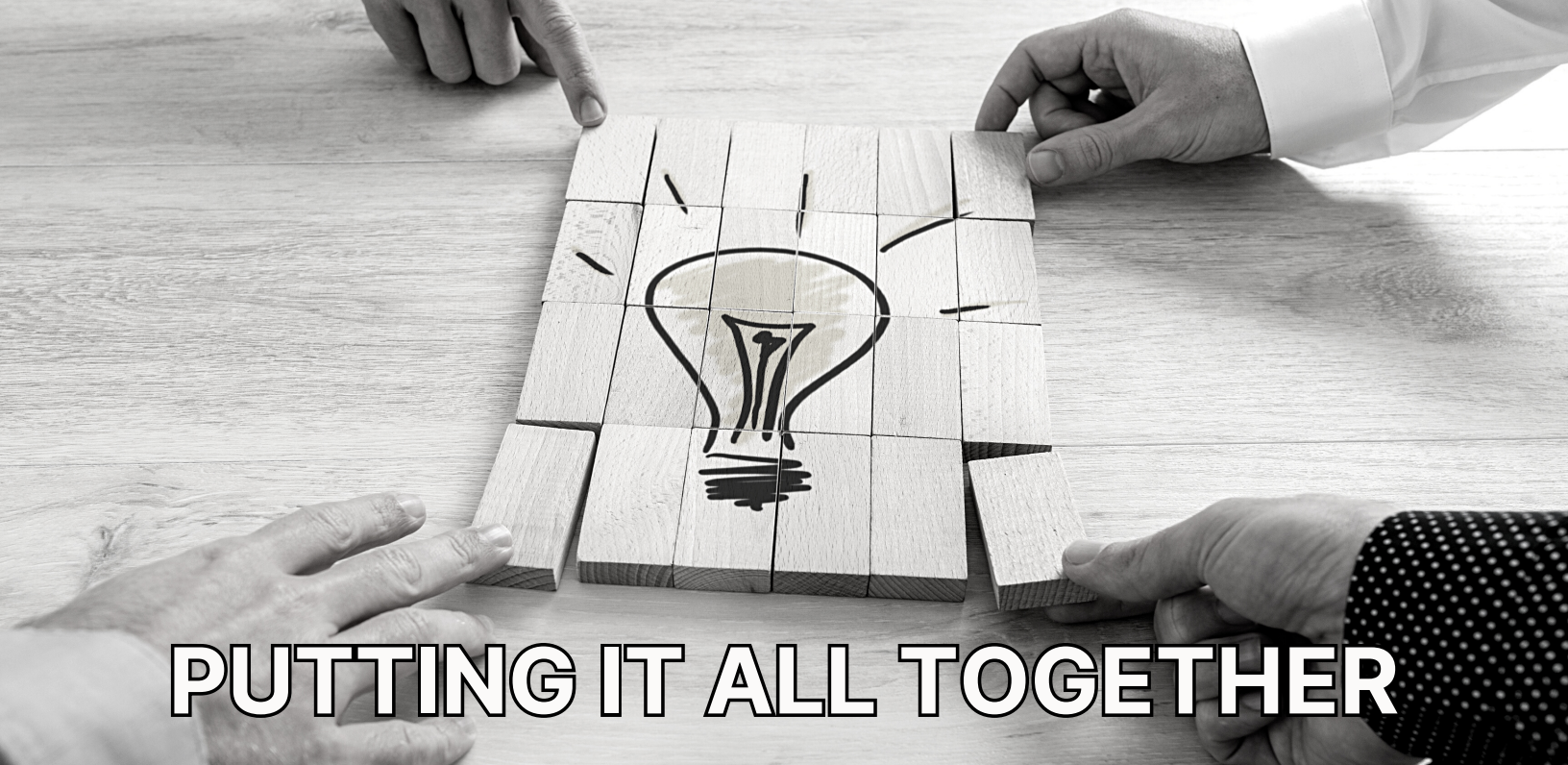
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PUTTING IT ALL TOGETHER

Your organization's strategic plan will be as unique as your organization. However, there are some components to most strategic plans contain. You can use the outline below to assemble all the parts of your completed plan.

Community organization leaders enrich our world with their vision for better communities. There is no better way to pursue that vision than to create a strategic plan. Nonprofit strategic plans sharpen your organization's goals and priorities while providing a roadmap for bigger and better things. A strategic plan is the result of a process designed to create a shared vision and build consensus across your organization and community stakeholders - freeing your team up to do what they do best - creating positive, meaningful, and powerful change in the community.

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STRATEGIC PLAN OUTLINE

Here is a simple list of items to include in your final Strategic Plan packet:

Information about your organization
- Executive Summary
- Mission, Vision, and Value Statements

Your Team
- Strategic Planning Committee Members
- Board Members

Strategic Plan and Goals
- Strategic Planning Chart
- SMART Worksheets for each goal

Assessment Plan
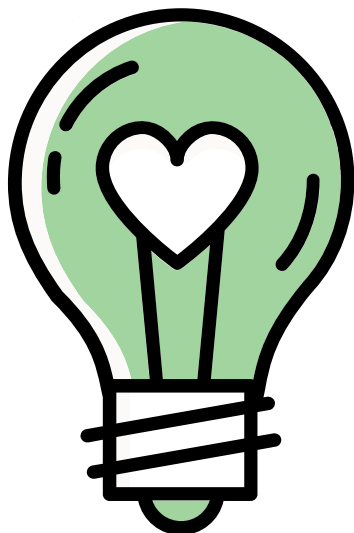- KPIs your team has selected
- Assessment Meeting Schedule

SWOT Analysis
- Strengths
- Weaknesses
- Opportunities
- Threats

Financial
- Fundraising Plan
- Approved Annual Budget

Exit Survey

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Five Year Strategic Plan Template

Administrative

	2024 Q1	2024 Q2	2024 Q3	2024 Q4	2025	2026	2027	2028
Operational								
Building/Operating Space								
Major Expenditures								
Leadership and Staffing								

Marketing and Communications

	2024 Q1	2024 Q2	2024 Q3	2024 Q4	2025	2026	2027	2028
Social Media								
Website								
Newsletter/Email								
Media Exposure								

Fundraising

	2024 Q1	2024 Q2	2024 Q3	2024 Q4	2025	2026	2027	2028
Donor Relations								
Grants								
Sponsorships and Donations								

Department or Service Area

	2024 Q1	2024 Q2	2024 Q3	2024 Q4	2025	2026	2027	2028
Program/Service 1								
Program/Service 2								

Department or Service Area

	2024 Q1	2024 Q2	2024 Q3	2024 Q4	2025	2026	2027	2028
Program/Service 1								
Program/Service 2								

Department or Service Area

	2024 Q1	2024 Q2	2024 Q3	2024 Q4	2025	2026	2027	2028
Program/Service 1								
Program/Service 2								

ADDITIONAL RESOURCES

Non-Profit Leadership Summit:
Strategic Planning Workshop Manual

www.stetson.edu/other/community-engagement/npls.php

You can find a copy of this workshop manual on the Stetson Center for Community Engagement website along with the following worksheets:
- Strategic Priorities Worksheet
- Your Team Worksheet
- Category Worksheet
- Goal Worksheet
- SWOT Analysis Worksheet
- 5-Year Plan Template

Community Conversations at Stetson University

www.stetson.edu/other/community-engagement/community-conversations.php

Join the Center for Community Engagement every other month starting January 2024. Community Conversations will be held the last Wednesday of every other month from 10am to 12pm. Each Community Conversation will focus on a different topic ranging from administrative skill workshops to issue area focus group discussions.

Community Conversations: Free or Low Cost Technology and Platforms for Non-Profit Management - January 31, 2024

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The Rockefeller Foundation DIY Toolkit: Development Impact & You

www.rockefellerfoundation.org/report/diy-toolkit-development-impact-you/

This is a toolkit on how to invent, adopt, or adapt ideas that can deliver better results. It's quick to use, simple to apply, and designed to help busy people working in development. It draws on a study of many hundreds of tools currently being used. All the tool descriptions include a key reference, so it is easy to trace back their origins and dive deeper into other publications about their application.

Edyth Bush Institute

ebi.rollins.edu

The Edyth Bush Institute for Philanthropy & Nonprofit Leadership at Rollins College is the premier source for nonprofit training, certificates, and custom training. The Edyth Bush Institute offers workshops in Advocacy and Public Policy, Board Development and Governance, Custom Programs, Executive Transition, Financial Management, Fundraising and Development, Leadership, Management & Organizational Development, Marketing and Public Relations, Networking Opportunities, and Volunteer Management.

Strategic Plan Review and Advising Session

Email to schedule appointment: awillacker@stetson.edu

If you would like a second set of eyes on your Strategic Plan or you are looking for help with a particular section, you can schedule an appointment with the CCE Team where we can provide feedback on your plan, make suggestions, provide recommendations for the next steps in the process, and make any needed referrals to area experts.

CENTER FOR COMMUNITY ENGAGEMENT

Kevin Winchell
kwinchel@stetson.edu

www.stetson.edu/cce
@stetsonu_cce

Taylor Hibel
thibel@stetson.edu

Ann-Marie Willacker
awillacker@stetson.edu

General Contact
cce@stetson.edu

REFERENCES

Dr. Randall Croom - Associate Professor of Management, Stetson University

Funding For Good - Nonprofit Strategic Planning: Your Complete Guide

Nonprofit Blog - A Comprehensive Guide to Nonprofit Strategic Planning

The Rockefeller Foundation - DIY Toolkit: Development Impact & You

Bloomerang - Nonprofit Strategic Planning: Ultimate Guide

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