Getting Nonprofit Strategic Planning Right

June 20, 2023
3 – 4:15pm ET
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Where we’re going

Strategic Planning at a Glance

Start here to get radical clarity on the things that matter most

- **Scope the Work**: Clarify the critical questions or decisions that will guide your planning process
- **Engage Stakeholders**: Identify who to involve in the planning process and how to engage them
- **Clarify Strategy**: Make choices about the impact you want to have, how, and for whom
- **Set Strategic Priorities**: Translate your impact goals into clearly articulated priorities
- **Estimate Resources**: Figure out the time, money, and skills it will take to carry out your priorities
- **Plan to Implement**: Determine how to manage and monitor progress and adapt as needed

*Source:* The Bridgespan Group
Scope the work

Clarify the critical questions or decisions that will guide your planning process

- What are the most important decisions facing our organization? Where should we focus our time and energy in the planning process?

- Why are we embarking on a strategic planning process, and what do we want to get out of it?
Engage stakeholders

Identify who to involve in the planning process and how to engage them

- Who will we need to help develop and implement our strategic plan? How and when will we engage them?

- Do these individuals or groups reflect the perspectives of those most proximate to the work?
Clarify strategy

Make choices about the impact you want to have, how, and for whom

- What is the problem we seek to address in the world?
  - Are some populations disproportionately impacted?

- What impact goals we will hold ourselves accountable to over the next 3-5 years?
  - Who is our population of focus?
  - Where will we do our work?

- How does our portfolio of work lead to the impact we aspire to achieve?
  - What external trends could affect our work?
Set strategic priorities

Translate your impact goals into clearly articulated priorities

- How well are we performing against our impact goals today?
  - Across our portfolio of work, among different populations, and compared to other actors?

- What will we need to differently to accomplish our impact goals in the future?
  - What programs may we need to establish, grow, evolve, or sunset?
  - How do we—or how could we—advance equity in our portfolio of work and program design?
Estimate resources

Figure out the time, money, and skills it will take to carry out your priorities

- What resources—financial, human, organizational—will we need to pursue our strategic priorities?
  - Where will we need to add, reduce, or diversify talent?
  - What new systems or capabilities will we need to build or buy?
  - What level and what type of funding will be required?

- Do we have the right organizational design in place to pursue our strategic priorities?
Plan to implement

Determine how to manage and monitor progress and adapt as needed

- What milestones and metrics will we track to ensure progress and accountability?
  - How might we disaggregate data to assess the equity implications of our work?

- What are the biggest risks or outstanding open questions?
  - How might we proactively mitigate these risks?
  - How will we experiment, learn, and adapt over time?

- How will we use our strategic plan to continually inform decision making?
Additional tools to support you

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**Source:** The Bridgespan Group
Upcoming Strategic Planning webinars

What Are Intended Impact & Theory of Change?
July 11, 2023
How II/TOC can help build a strong foundation for an effective strategy.

How to Live into Your Nonprofit Strategic Plan
July 25, 2023
Review three key tools to support strategic plan implementation.

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