

How to Live into Your Nonprofit Strategic Plan

Tuesday, July 25
3:00 – 4:15pm ET



Host



Larry Yu

Senior Editorial Director
The Bridgespan Group

Bridgespan Speakers



Teni Lanre-Amos

Consultant
The Bridgespan Group



Libbie Landles-Cobb

Partner
The Bridgespan Group

Guest Speakers



Emilie Chambert

Chief Program Officer
Living Goods



Stacey Strongarone

Vice President and Chief of Staff
Vera Institute of Justice



The Bridgespan Group is a global nonprofit organization that collaborates with mission-driven leaders, organizations, and philanthropists, to make the world more equitable and just.

Friendly reminders



**After today's webinar,
we'll send you:**

Recording & slides

Links to all the resources we
mention today



Stay in touch!

Bspan.org/subscribe

[@BridgespanGroup](https://twitter.com/BridgespanGroup)



**Please complete the
post-webinar survey**

We value your feedback!



How to Live into Your Nonprofit Strategic Plan

Tuesday, July 25
3:00 – 4:15pm ET



Host



Larry Yu

Senior Editorial Director
The Bridgespan Group

Bridgespan Speakers



Teni Lanre-Amos

Consultant
The Bridgespan Group



Libbie Landles-Cobb

Partner
The Bridgespan Group

Guest Speakers



Emilie Chambert

Chief Program Officer
Living Goods

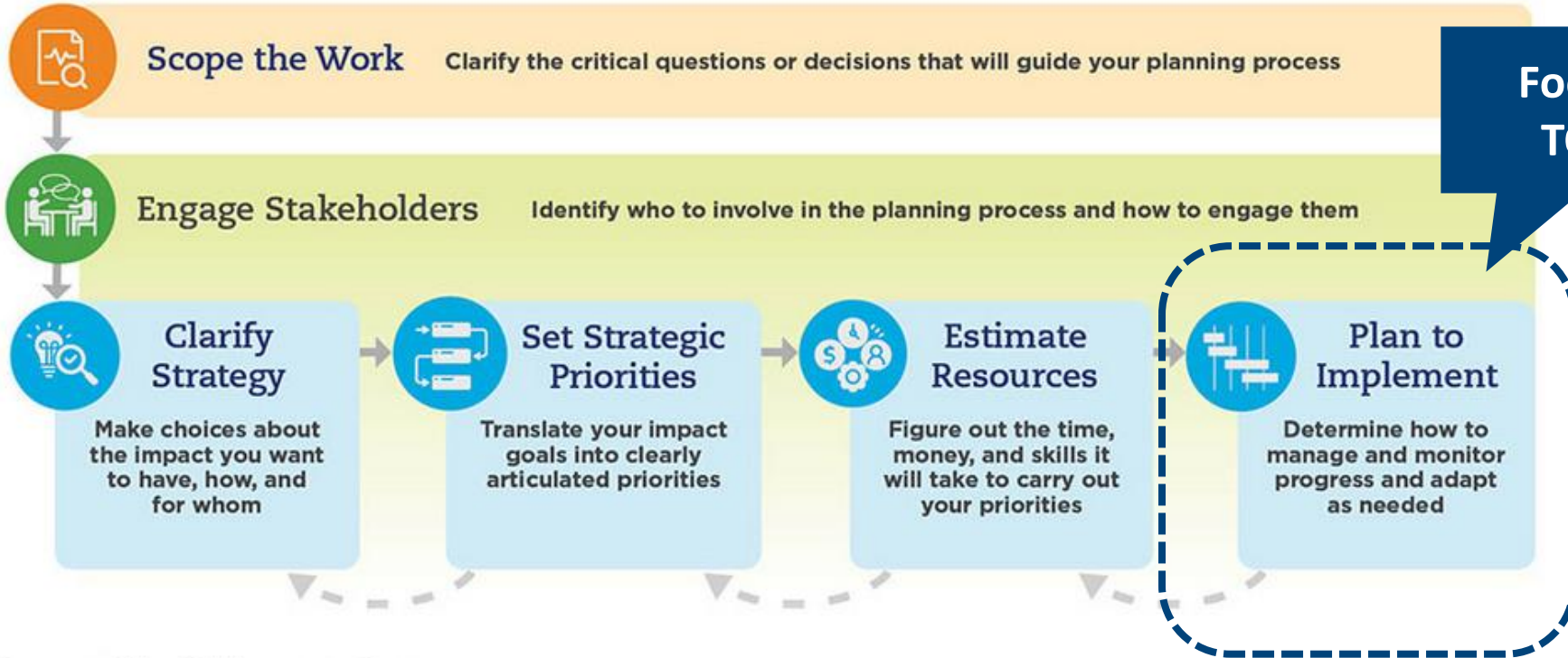


Stacey Strongarone

Vice President and Chief of Staff
Vera Institute of Justice

Strategic Planning at a Glance

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



**Focus for
TODAY**

Source: The Bridgespan Group

Why are we here today?

What challenges have you experienced implementation?

What are the biggest questions on your mind?

Use the Zoom chat function
to share your reflection with the other attendees

Tools to help support successful implementation



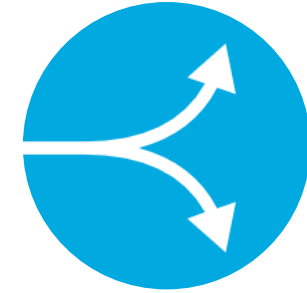
PERFORMANCE DASHBOARD

What milestones and metrics will we track to ensure progress and accountability?



LEARNING AGENDA

What are the biggest open questions / unknowns facing our organization?



DECISION CRITERIA

How will we use our strategic plan to continually inform decision making?



Use these tools to keep implementation on track by supporting accountability and communication



Plan with implementation in mind via effective stakeholder engagement

- Authentically engage key stakeholder groups—especially those who will be most impacted
- Ensure your plan—and key decisions flowing from it—are well understood before pivoting to implementation
- Clearly define key responsibilities to ensure accountability and ownership

Guest Speakers



Emilie Chambert

Chief Program Officer
Living Goods



Stacey Strongarone

Vice President and Chief of Staff
Vera Institute of Justice

Tools to help support successful implementation



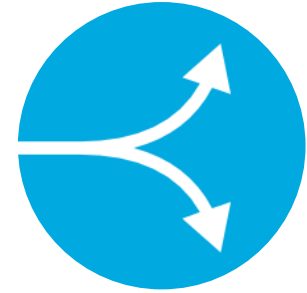
PERFORMANCE DASHBOARD

What milestones and metrics will we track to ensure progress and accountability?



LEARNING AGENDA

What are the biggest open questions / unknowns facing our organization?



DECISION CRITERIA

How will we use our strategic plan to continually inform decision making?

Tools to help support successful implementation



PERFORMANCE DASHBOARD

What milestones and metrics will we track to ensure progress and accountability?



LEARNING AGENDA

What are the biggest open questions / unknowns facing our organization?



DECISION CRITERIA

How will we use our strategic plan to continually inform decision making?

Performance dashboards help organizations use data to measure and manage progress against strategic priorities



Key characteristics of performance dashboard metrics



Serve as “indicator lights”

What will give you **just enough information to track progress** and signal when you need to dig deeper?



Provide information **timely** enough to act on

What will provide data **frequently enough to be able to course correct** if needed?



Are **reasonable to measure**

Is the “**juice is worth the squeeze**”?
(i.e., Is the effort to measure worth the information you get?)

A dashboard example

Hypothetical organization: Springtown Diabetes Care, whose mission is to improve the quality of life of people in Springtown living with diabetes and to reduce the number of community members who get the disease

	Priorities	Metrics	Near-Term Target	Actual
Impact	Help Springtonians with diabetes to get access to resources and care	% Springtonians with diabetes who were an SDC navigation client	15%	9%
		Average # navigation meetings / client	4	1.7
		% clients who would recommend SDC's navigation to others	90%	92%
		% clients reporting improvement after SDC's navigation support	100%	45%
	Increase awareness of diabetes prevention	# "Diabetes Aware" info table events	40	34
		# info-sharing partnerships	3	5
Operations	Run effective and efficient operations	% utilization of SDC navigation specialists	80%	72%
		# volunteer service hours	800	690
Talent	Recruit and retain high-performing staff	% staff turnover	<20%	15%
		# open positions	4	2
		% staff that are people of color	50%	35%
Finances	Maintain a balanced budget	% variance from annual operating budget	0%	-7%
		# months of ongoing expenses covered by unrestricted net assets	6	2
	Raise local funds to support local operations and national diabetes research	Total fundraising revenue	\$6,000,000	\$5,873,627
		Average funds raised/event	\$300,000	\$287,000
		# individual donors	4750	3033
	Average gift/donor	\$500	\$810	
Governance	Fully engage the board	% board meeting give/get targets	100%	75%

Living Good's Dashboard

Organisation Dashboard							
Rating: red = not met, orange = at risk to miss, blue = on track, green = met							
	Metric	2021 Target	2021 Result	2022 Target (annual)	Result	Rating	Comments and Risks
Impact	Total active CHWs					Orange	Comment: Key risk:
	HIHTs delivered per CHW per month					Blue	Comment: Key risk:
	# Total HIHTs					Blue	Comment: Key risk:
Resourcing	% Committed + discounted pipeline vs target - current year					Blue	Comment: Key risk:
	% Committed + discounted pipeline vs target - following year					Orange	Comment: Key risk:
	% Co-financing target					Blue	Comment: Key risk:
Finance	# Unrestricted Net Asset months					Green	Comment: Key risk:
	# Cash months					Green	Comment: Key risk:
	% Implementation / program ratio					Green	Comment: Key risk:
	Burn rate (Actual vs Budget)					Blue	Comment: Key risk:
Digital Health	SHA tech incident mgt					Green	Comment: Key risk:
People & Culture	Staff Voices: Engagement Score						Comment: Key risk:
	Staffing level					Blue	Comment: Key risk:
2022 Big Wins	Overall performance against big wins					Blue	Comment: Key risk:
2022 Strat. Enablers	Overall performance against strat. enablers					Blue	Comment: Key risk:

Tools to help support successful implementation



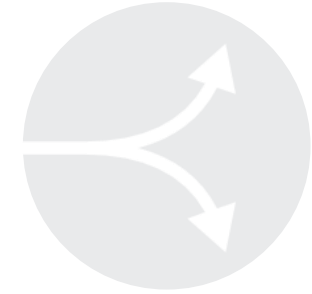
PERFORMANCE DASHBOARD

What milestones and metrics will we track to ensure progress and accountability?



LEARNING AGENDA

What are the biggest open questions / unknowns facing our organization?



DECISION CRITERIA

How will we use our strategic plan to continually inform decision making?

A learning agenda can help you thoughtfully elevate your organization's next steps to address key unknowns from your strategic planning process



Captures key open questions / unknowns related to your strategic plan



Can be used as an accountability and communication tool with key stakeholders



Helps an organization test, learn, and adapt through uncertainty

Living Goods' Learning Agenda



Based on LG's theory of change, what success would look like, and their prioritization criteria, included questions around three key themes:

- Improving Health Outcomes, Efficiency, Equity, Humanity
- Optimizing a scalable model & operational best practice
- Supporting an enabling environment

Tools to help support successful implementation



PERFORMANCE DASHBOARD

What milestones and metrics will we track to ensure progress and accountability?




LEARNING AGENDA

What are the biggest open questions / unknowns facing our organization?



DECISION CRITERIA

How will we use our strategic plan to continually inform decision making?



Decision criteria help your organization continually take steps to keep aligned to your strategic plan

Create consistency

Ensure comprehensiveness

Share reasoning

Facilitate communication

Example Decision Criteria



CATEGORY	SAMPLE STRATEGIC CRITERIA
Aligned with Theory of Change	<ul style="list-style-type: none">• Who: Focuses on target constituents / clients• What: Achieves target outcomes• How: Aligns with core activities, approaches, values, beliefs
Financially sustainable	<ul style="list-style-type: none">• Net financial contribution is positive• Funding is renewable and sustainable• Cost per outcome is reasonable• Utilization rate is expected to be high
Operationally viable	<ul style="list-style-type: none">• Fits with staff skills and expertise, or can be developed• Feasible given current staff time / capacity• Leverages existing infrastructure and facilities• Relationships with partner organizations are strong• Policy environment is supportive• Achievable path to a scale that will have meaningful impact
Organizational benefits/risks	<ul style="list-style-type: none">• Does not duplicate strong programs from other orgs• Provides a unique leadership role for organization• Organizational risks are low (reputation, relationships, legal)• Gives access to other high-impact opportunities



Tailored to each nonprofit:
Invest time in customizing and aligning as a team



More consistent across nonprofits:
Select the few that are highest priority, customize if needed

Choose the 8-10 most critical for your organization

National Initiatives: Impact Pipeline

STAGE 1

IDEA
DEVELOPMENT

STAGE 2

TESTING
AND REFINEMENT

STAGE 3

ROLL-OUT & EVIDENCE
BUILDING

STAGE 4

NATIONAL
SCALE

Stages 1 and 2 provide an opportunity to deep dive into a problem and experiment to figure out what is possible. Ideas come from a variety of sources, including from staff at all levels.

Stages 3 and 4 allow us to implement an idea in different places and ways over several years. In Stage 3, we make adjustments and distill how to realize national impact. In Stage 4 the idea is poised to achieve transformational change over several years.

A photograph of a spiral-bound notebook with a blank, lined page. To the right of the notebook is a lit lightbulb, casting a warm glow. The entire scene is set on a dark wooden surface. The notebook is on the left side of the image, and the lightbulb is on the right side. The lightbulb is lit, and its glow is visible. The notebook is open, and the page is blank. The wooden surface is dark and has a visible grain. The overall image is a top-down view.

Takeaway tips:

Key approaches to support the pivot from planning to implementation

- Engage the people who will help implement the plan during the creation of the plan
- Monitor implementation through a performance dashboard to help track progress toward your goals
- Use a learning agenda to structure how you will address open questions and adapt as needed
- Anchor on a set of criteria that help turn your strategic plan into a tactical compass for day-to-day decisions

Learn more about Bridgespan's cohort services for nonprofit leadership teams

Leadership Accelerator

Offers four self-paced programs for leadership teams interested in addressing a specific strategy or management challenge. Programs range from 10-18 weeks in length.

www.bspan.org/BLA

Achieving Strategic Clarity



Get clarity on your organization's impact goals and programs

Creating an Adaptive Plan



Create a dynamic plan to navigate uncertainty with confidence

Strengthening the Executive Team



Unlock your team's full potential

Investing in Future Leaders



Create a strategic and equitable approach for developing your talent

Leading for Impact[®]

Allows leadership teams to explore Bridgespan's most popular management tools while applying a subset to their own strategic priorities. This is a year-long program.

www.bspan.org/LFI

In **Leading for Impact[®]**, executive teams learn and grow together through....



Virtual classroom workshops on topics of strategy, team, and organization



Team-led project tailored to the organization's success



Coaching and peer connections to enable deeper learning and sharing

Stay Connected:



Publications@Bridgespan.org



Bspan.org/subscribe



[@BridgespanGroup](https://www.instagram.com/BridgespanGroup)