

STRATEGIC PLANNING



For a Successful Non-Profit Organization

The Arc 2018 NATIONAL CONVENTION
NASHVILLE, TN

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Learning Objectives



- Develop and implement a strategic plan for your organization.
- Incorporate your values and beliefs in a clear operation plan for the present and future.
- Clearly articulate your organization's goals and plans – both current and long term – to both leaders and members, to ensure success and sustainability.

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- Who We Are and Why
- SWOTT
- Where We Are Going
- What We Do To Get There
- How We Will Do It
- Engagement of Stakeholders



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Getting Started

- 1 Page Strategic Plan
- Definitions, Jargon
- Think About Your Organization
- Start to Fill In
- Take Back to your Organization



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Strategic Planning for a Successful Non-Profit Organization

1. Who and Why?
2. Brand Promise and Pitch
3. SWOTT
4. Where, What, How, Measure
5. Engage

The Arc 2018 National Convention Nashville, TN Strategic Planning Template. The template is divided into five numbered sections: 1. Who and Why? (Purpose/Mission), 2. Brand Promise and Pitch (Brand Promise), 3. SWOTT (SWOTT Analysis), 4. Where, What, How, Measure (Goals, Objectives, Actions, Metrics), and 5. Engage (Engagement Plan). The template includes various sub-sections and tables for detailed planning.

The Arc 2018 National Convention Nashville, TN Core Values Diagram. The diagram shows a central figure running, surrounded by five core values: Recruitment, Orientation, Performance Appraisals, Reward and Recognition, and Everyday Management. The background features words like RESPECT, INNOVATION, ETHICS, CUSTOMER, QUALITY, EXCELLENCE, TRUST, and VALUES.

Core Values:

- Five Statements
- Defines Should and Should Nots
- Govern the Organization's Underlying Decisions
- The "soul" of the Organization

The Arc 2018 National Convention Nashville, TN Purpose Diagram. The diagram shows a hand holding a red heart, with the text "Purpose puts 'heart' into the business". The background features a suit and tie.

Purpose

- Reason Your Organization Exists
- Value of Your Services
- Clients You Serve
- Mission

How will your brand Measure how it is doing on your brand promise?



The diagram shows a central box labeled "Differentiator" with arrows pointing to "Everything Changes" and "Measurable". "Everything Changes" points to "Drives other measures & processes", which points to "Ability to deliver it!".

Brand Promise

- What Really Matters to Your Clients / Consumers
- How Are You Different
- Starting Point of All Executive Actions

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The Arc											
Section 2				Section 3							
Area	Goal	Measure	Target	Area	Goal	Measure	Target	Area	Goal	Measure	Target
Programs	Programs	...	...	...	Programs	...	...	...
...

ELEVATOR PITCH



The cartoon shows two men in an elevator. One man says, "I've got an elevator pitch, an escalator pitch, and, just to be safe, a stairway pitch."

Elevator Pitch

- What's the Message?
- Organizational Alignment
- Communication
- Commonality

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The puzzle pieces are yellow (Strengths), red (Weaknesses), green (Opportunities), and blue (Threats).

SWOTT: Your Environment – Internal and External

- Strengths
- Weaknesses
- Opportunities
- Threats
- Trends

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The Arc											
Section 2				Section 3							
Area	Goal	Measure	Target	Area	Goal	Measure	Target	Area	Goal	Measure	Target
Programs	Programs	...	...	...	Programs	...	...	...
...

Strategic Planning for a Successful Non-Profit Organization

1. Who and Why?
2. Brand Promise and Pitch
3. SWOTT
4. Where, What, How, Measure

Targets – Where? / What?

Three to Five Years

- Where do you want to be in three to five years?
- Quantifiable
- Financial, Operations, Donations, Marketing

Sandbox / Market

- Where Can We Be #1 or #2
- Geographical Reach, Service Offering, Delivery Model
- Market Share

Targets – How? / How Will We Know

Key Thrusts and Capabilities

- Dominate Defined Sandbox
- Fulfill Purpose & Meet Quantifiable Targets
- Strategic Moves
- Build Brand Promise

KPIs

- Key Performance Indicators and Critical Metrics
- Measure and Report Key Activities Driving Towards Building Capabilities



Goals

Goals for the Next 12 Months

One Year Goals

- Quantifiable
- Financial
- Operations
- Sales
- Marketing


Key Initiatives

- Five Top Initiatives for the Year
- Aligned to Key Capabilities
- Elevator Pitch

KPIs

- How Will You Measure Progress?
- Critical Numbers

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ACTION PLAN

for the Next Quarter

Quarterly Goals

- Quantifiable
- Financial
- Operations
- Sales
- Marketing

Rocks & Accountability

- Five Top Initiatives for the Quarter
- Priorities for the Entire Organization

KPIs


- How Will You Measure Progress?
- Critical Numbers

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5 for organization, only
3 per person.

who will do what and by when

ID specific measures



Sample Template for Creating Project Plans

Project Charter

Action Plan	What Activity?	Who Does?	When Due?	Done?
Milestone 1 -->				
Task 1				
Task 2				
Task 3				
Task 4				
Milestone 2 -->				
Task 1				
Task 2				
Task 3				
Task 4				

Accountability

- Who Is Doing What by When?
- How Is Progress Measured?
- Alignment: Top to Bottom

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