STRAIGHTIC PLANNING

For a Successful Non-Profit Organization

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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.
Strategic Planning for a Successful Non-Profit Organization

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

Getting Started

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

Core Values:
- Five Statements
- Defines Should and Should Nots
- Governs the Organization’s Underlying Decisions
- The “soul” of the Organization

Purpose
- Reason Your Organization Exists
- Value of Your Services
- Clients You Serve
- Mission
Strategic Planning for a Successful Non-Profit Organization

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

**Elevator Pitch**
- What’s the Message?
- Organizational Alignment
- Communication
- Commonality

**SWOTT: Your Environment**
- Internal and External
  - Strengths
  - Weaknesses
  - Opportunities
  - Threats
  - Trends
Strategic Planning for a Successful Non-Profit Organization

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

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

state-wide individual and family support. Powerful public policy advocacy define your market and be number One clients served internal productivity, how money is spent?
### 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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### 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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### Accountability

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

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<th>Project Name</th>
<th>Action 1</th>
<th>Action 2</th>
<th>Action 3</th>
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5 for organization, only 3 per person.

who will do what and by when

ID specific measures