

# Good Strategy, Bad Strategy

SC&H Nonprofit Summit

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# Agenda and Purpose

- When Should You Do Strategic Planning
- What Type of Plan Do You Need
- 4 Components of a Good Process



- Stakeholder Engagement
- Setting Strategic Direction
- Implementation
- Measurement and Accountability

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# What My Clients have in Common



**Chimes**

**Carson Scholars Fund**

**Supporting Public Schools of Choice**

**Institute of Notre Dame**

**Y of Central Maryland**

**Evergreen Health Cooperative**

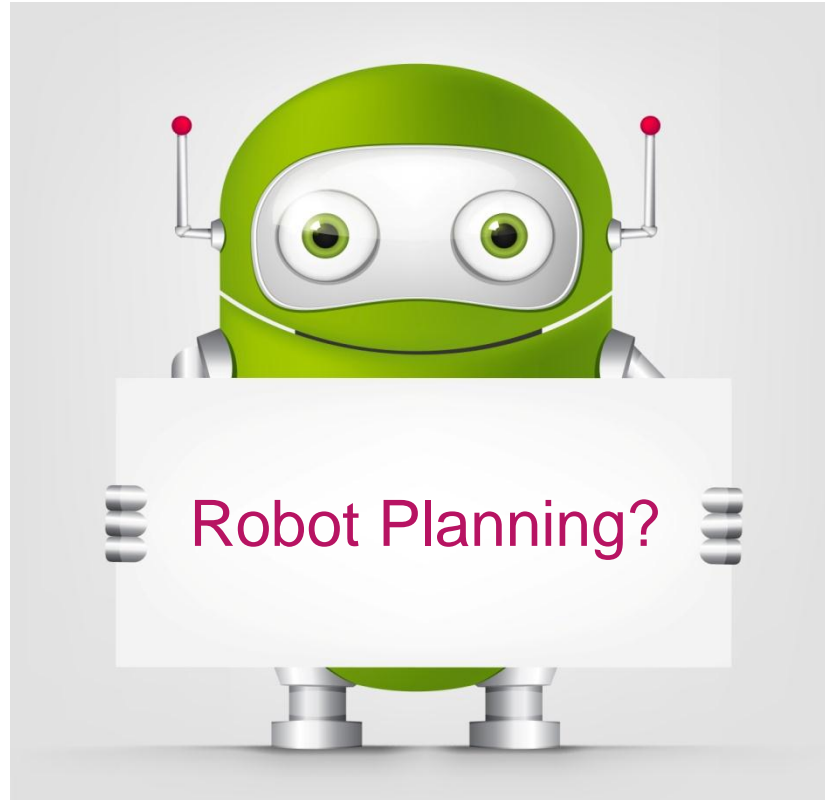
**Economic Alliance of Greater Baltimore**

**The Family Tree**

**University of Baltimore-Merrick School of Business**

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# When Should You do Strategic Planning?



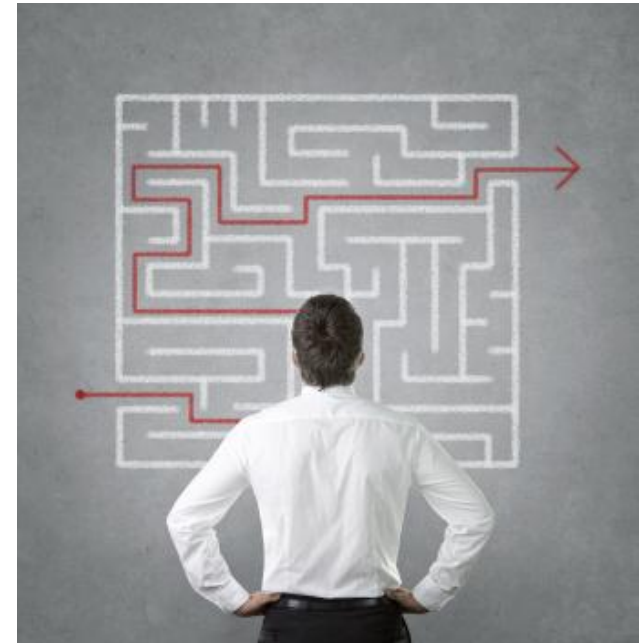
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What got you here,  
won't get you there.

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# Choose a Plan and Process for Your Need

- Strategic Plan – defining strategy or direction and making decisions to allocate resources to pursue that strategy
- Operating Plan – a detailed plan which provides a clear picture of how key areas contribute to the achievement of strategic goals
- Fundraising Plan – detailed plan of financial projections, a list of donors and prospects and a strategy to target solicitation



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# Proven Strategic Planning Process for Meaningful Action



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# Proven Process: Collaboration

## Collaboration

Engage teams,  
stakeholders,  
audiences to identify  
the best solutions  
together



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# Proven Process: Collaboration

- **This is the time to engage your key stakeholders**
- **Value to stakeholder engagement:**
  - **Encourages inclusion**
  - **Introduces diverse perspectives**
  - **Builds awareness of your current situation**
  - **Secures buy-in and investment**



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# Proven Process: Collaboration

Method	Data quality	Advantages	Limitations	Time & Cost
<b>1:1 interviews</b>	High. Detailed, have ability to clarify to improve quality	Builds rapport, high touch, increases knowledge	Must establish trust to receive candid answers	High time and high cost
<b>Focus groups</b>	High. Can clarify to improve quality	Easy to measure input, immediate feedback on current situation	Must facilitate well to prevent bias, less in-depth than interviews	High time and medium cost
<b>Online surveys</b>	Less reliable data	Convenient, design flexibility	Limited sampling & respondent availability, compliance	Less time and low cost

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# Proven Process: Visioning



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# Proven Process: Visioning

- **This is the time to think big about the future of the organization**
- **Confirm your mission and vision**
- **Review the feedback from stakeholders**
- **Conduct a SWOT**
- **Dream – imagine it's three years in the future.....**
- **This is the part of the process where your board should really be involved and shine**

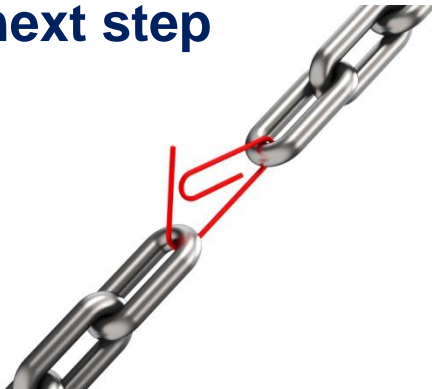


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# Proven Process: Visioning

## Negative Outcomes

- Leave feeling good but without clear next steps
- Spent the day talking without reaching agreement or consensus
- Lots of great ideas but no framework for evaluating or taking the next step



## Positive Outcomes

- Solid understanding of current situation
- Confirm mission & vision
- Agreement on high level strategic direction
- High level goals to achieve strategic direction



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# Proven Process: Implementation



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# Proven Process: Implementation

- **Now What?**
- **Goals, strategies, objectives**
- **Translate the big picture into actionable steps**
- **Involve your team, build excitement**



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# Proven Process: Measurement & Accountability

## Measurement & Accountability

Identify key metrics, be disciplined about tracking, start a dialogue about success and failure



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# Proven Process: Measurement & Accountability

- Each goal has multiple strategies and action items
- Metrics are associated with the strategies
- Where possible, baseline data should be established to measure progress going forward
- Determine who will track and report metrics to the board to evaluate progress
- Metrics will be aligned with board committees, where appropriate, to instill accountability and make committee work meaningful



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# Sample Dashboard

Strategic Plan for Nonprofit Organization ABC

Fiscal Year:

Board of Directors Dashboard





Support/Training/Advocacy		
	Q1-Q2	Q3-Q4
Statewide PB advocate & clearinghouse		
Enhance capacity of provider community		
Training & support center for attorneys		
Define and expand volunteer base		

Metrics		
	Q1-Q2	Q3-Q4
Impact on community & people in need		
Build capacity of bar/provider community		
Supporting funders' expectations		
Develop mechanisms to track metrics		
Technology & tracking of metrics		

Funding		
	Q1-Q2	Q3-Q4
Financial plan to support strategic plan		
federal, state & local govt		
corporate sponsors		
board - \$ and % participation		
foundations		
Secure funding for Consumer Protection		
3 funding sources		

Service Innovation/Incubation and Delivery		
	Q1-Q2	Q3-Q4
Develop system for identifying & prioritizing needs		
Create parameters for assessing legal needs		
Funding sources		
MOU with partners		
Use technology to improve effectiveness & reach		
identify technology resources		
seek funding to pay for IT		
Communication strategy		

Branding		
	Q1-Q2	Q3-Q4
Conduct brand assesement exercise		
MSBA relationship		
education		
outreach		
Thought leadership		
Uof MD, UB, law firms		
Human services provider		
Leverage technology		
internal IT review of resources		
marketing/communication plan		

Legend:	
	Achieved
	On target/likely to achieve
	In process/unlikely to achieve
	Failed to achieve

Reporting Date: \_\_\_\_\_

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# Bad Strategy, Good Strategy: What Side are You On?

What type of planning do you want for your organization?

- Robot Planning
- Planning based on the idea that “what got you here, won’t get you there”

What 3 things will you change as a result of today?

- Change #1
- Change #2
- Change #3

What area of planning holds your BIGGEST CHALLENGE?

- Collaboration
- Visioning
- Implementation
- Measurement & Accountability



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# Thank You

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