20 tuenty STRATEGIC CONSULTANTS Strategic Leadership Conference *Tuesday, October* 4th, 2022









Center for Nonprofit Excellence















Reconcile Consulting

Strategic Planning in an (almost) post-COVID world

Carl Williams, Founder and CEO Josh Kornberg, EdD, CFRE, Senior Advisor

Agenda

- Introductions
- What is a strategic plan?
- Why do they end up on a shelf?
- How to hit the reset button on a plan.
- What do I need to start?
- Tips and tricks for implementation.
- Question and Answer

About Carl

- Founder, President & Chief Energy Officer at 20/twenty Strategic Consultants
- 20+ years as a Business Coach, Trainer and Educator
- CEO, Professor, Chair, Nonprofit Executive Director, Pastor
- Served on more that 15 Nonprofit Boards
- Board Service: Community Foundation of Louisville, Volunteers of America Mid-States, Teach Kentucky...

About Josh

- Executive Director of Caesars Foundation of Floyd County
- Academic background in organizational development
- Strategic Planning in Small, Family-Owned Firms, author
- Indiana University Alumni Association, national chair
- Served on 10+ non-profit board

Meet a friend!

- Name
- Organization
- One thing we hope to learn from this session
- Favorite Christmas movie



What is a strategic plan?

Strategic planning is an organizational management activity that is used to set priorities, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment.



What strategic planning isn't.

- One goal.
- One idea.
- Being all things to all people.
- It's not about what we do.
- Is not meant to sit on a shelf.



Why do plans end up on a shelf?

- Too broad.
- Too narrow.
- Too complicated.
- Not realistic.
- Not dynamic.
- No one to manage the work.



Hitting reset.

- We deserve a reset.
- It's healthy to re-assess.
- Shifting priorities:
 - COVID.
 - The workforce.
 - Inflation.

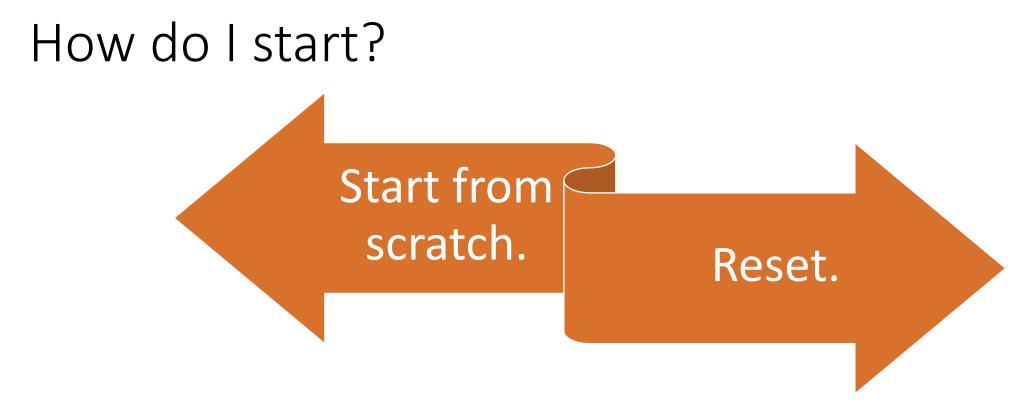
Reset ≠ Failure



Pause.

- Give yourself a minute to pat yourself on the back.
 - Share two professional accomplishments in the last two years!





- Substantial mission shift
- New senior leadership
- Current plan is more than 4 years old

- Need to re-focus
- No new programs/services
- Current plan is being actively used

How do I start?

- Get Board buy-in
- Decide on a timeline
- Begin compiling previous documentation



Discovery: 2-3 months Initial Meeting with Core Team Begin to gather prior documentation Define pillars with Core Team Build survey Define survey and interview list Conduct surveys and interviews Conduct SWOT with Steering Committee Assess Mission, Vision and Values with Steering Committee Vision for the Future: 1-2 months Build themes from interviews and surveys Connect themes from discovery to pillars Assign Staff Champions (1-2) for each pillar Host 4-6 hour full board visioning session Work with Staff Champions to develop goals, tactics and timelines for each pillar Strategy Development: 1-2 months Review goals, tactics and timelines with Steering Committee Present the final plan to the board for approval Load all pillars, goals and timelines into Monday.com Implementation: 1 month Discuss next steps with Core Leadership Team



Documents for Strategic Planning

- Previous strategic plan
- Current and previous annual budget
- Mission, Vision and Values
- Previous 3 years of 990s
- Previous 3 annual reports
- Organizational chart
- Marketing plan, if applicable
- Business/Work plan, if applicable
- Board member list
- Last 12 months of board minutes
- Any applicable reports or surveys (Employee Satisfaction, etc)

All documents should be submitted to the Google File that will be provided by 20/twenty Strategic Consultants.

What should the process look like?

The Strategic Planning Process



Tips and tricks for implementation

- One, and no more than two, champions for each part of the plan.
- Meet regularly to discuss. Cadence matters.
- Break your goals into tactics and then break them down again.
 - You will get busy doing other things
- Invest in a software to assist with management
- Invite mid-level management to the table.
- Don't get complicated!





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