



INTRODUCTION:

Strategic planning doesn't have to be daunting. Think about the process as a great way to reveal the status of your organization. For example, this exercise will expose your nonprofit's vulnerabilities, gaps in resources (staffing, funding, operations or board), unveil opportunities to scale or get granular and expose strengths.

To prepare for the process, gather a strong, internal team to lead and oversee planning and execution. The role of this team is to create solutions that will help elevate your nonprofit with the support of a strategic planning consultant. Together, this team will work cross functionally to gather data to help set clear priorities, goals, tactics and metrics for long-term success.

To be clear, the role of the consultant is to provide facilitation support and guidance to help move the strategic conversation forward. They will also work with clients to overcome challenges to garner consensus on important pain points, but the thought process and strategic priorities must come from the internal planning team – **not the consultant**.

HOW TO FIND THE STRATEGIC PLANNER:

1. Assemble the planning team: Identify key staff and stakeholders responsible for overseeing the strategic planning process. This can include board members, volunteers and community members (local officials and leaders of community-based organizations) who have a vested interest in the outcomes, impact and success of your nonprofit.

2. Ask your network for strategic planning consultant referrals or consider issuing a more formal “call for proposals” to potentially garner a more diverse pool of names.
3. Interview potential firms by asking questions like:
 - a). Describe your experience in strategic planning consulting.
 - b). How do you approach problem solving and identifying solutions?
 - c). What’s your approach to competitive analysis?
 - d). How do you ensure effective communication between stakeholders?
 - e). Describe your experience with data collection and analysis. NOTE: The most basic approach is a “Strengths Weaknesses, Opportunities and Threats” (SWOT) analysis. If they don’t mention this, gently end the interview and move on the next!

PRO TIP: If they mention a PESTLE analysis, they are providing a “best in class” approach to gathering data that will support your new strategic priorities – but be prepared to pay more for this kind of investigation. (PESTLE = Political, Educational, Social, Technological, Legal and Environmental).

- f). How do you handle clients that disagree with your recommendations?
- g). How do you manage for stakeholder and internal alignment of priorities when they are in conflict?
- h). Do you provide change management counsel for clients whose strategic planning process unveils a big shift in vision and priorities?

After the data is gathered, distill the information and share it with all relevant stakeholders. Then prepare a two-day retreat facilitated by your strategic planning consultant to further analyze the facts that will help you begin to frame out your strategic plan.

Consider the following list as agenda items for smaller, facilitated breakout groups at the retreat (with the understanding that your agenda will include obligatory items like introductions, framing the day, rules of engagement, etc).

1. Revise your nonprofit's mission, vision and value statements. You want to ensure these items are still relevant and in alignment with what the data analysis demonstrates.
2. Discuss potential objectives and tactics using the SMART goals approach to establish benchmarks (SMART goals are specific, measurable, attainable, relevant and time sensitive).
3. Determine if you have the resources and/or asset allocation to ensure you can meet stated goals and benchmarks. Go back to the data analysis if you need a reminder about the risks and opportunities your organization faces to determine your capability to be successful.
4. Develop the scaffolding of an action plan that will name the strategic priority, the responsible party, resources (budget, staffing, operations and technology), timeline and potential impact.
5. Determine how you will track and evaluate progress against the goals by defining key performance indicators (KPIs) and establish a quarterly review of benchmarks to determine

progress against the goals. You should know that these will constantly be in flux, so be prepared to shift benchmarks and other objectives over time, where needed!

As you wrap up your retreat, end the last day by reviewing important take aways and urgent next steps. Also confirm your organization's commitment to the agreements made in the retreat and follow up immediately to keep the momentum going.

If you haven't been able to narrow your strategic priorities to less than six, your strategic planning consultant will work with you to further distill your strategic priorities for implementation over the next three years.

Now that the hard work of consensus is complete and your priorities are defined, your strategic planning consultant will begin to draft your plan for iteration until the final text is approved and ready for graphic design. Once it's published you should share the plan with staff, constituents and potential funders. Your marketing team can determine the strategy for highlighting specific parts of the plan on relevant social media channels if applicable.

If you've chosen the right strategic planning consultant, he or she should offer a change management framework as a part of the scope of work. This is important to help your nonprofit pivot to the "new way" of doing business. Furthermore, a **stellar** strategic planning consultant will also agree to remain in contact with you beyond your contract for at least a month to answer questions or address any challenges that might arise as you begin implementation.

We know that the exercise of strategic planning isn't always straightforward and easy. The newly revealed data can challenge pre-conceived beliefs and norms, but having a firm understanding of opportunity costs and the nuances that make your organization vulnerable and successful is worth the exercise.

For more information about how to develop a successful framework for building successful Communities of Practice, partnerships, strategic planning, and board development, contact Onyx Strategies Group at info@onyxstrategiesgroup.com.

