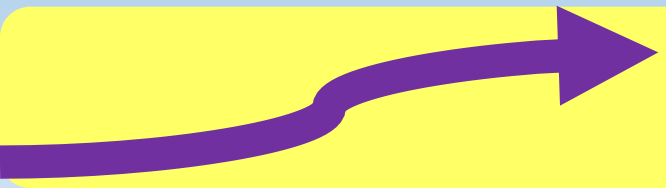




Pathways for Addressing Social Needs: Strategic Planning

Developing the Roadmap to Guide the Organization
Going Forward





Overview

- For any new program or project, the strategic plan will provide the roadmap to help with making the idea a reality.
- Good planning involves affirming the program's mission, assessing the environment in which it operates, developing a compelling (but realistic) vision, and setting the goals/objectives to achieve it.
- There are key steps that will assist in developing the program's strategic plan, monitoring and evaluating it, and identifying roadblocks/obstacles to success.
- The strategic plan will help to get the program/project from its current state to its future vision.



Benefits of Strategic Planning

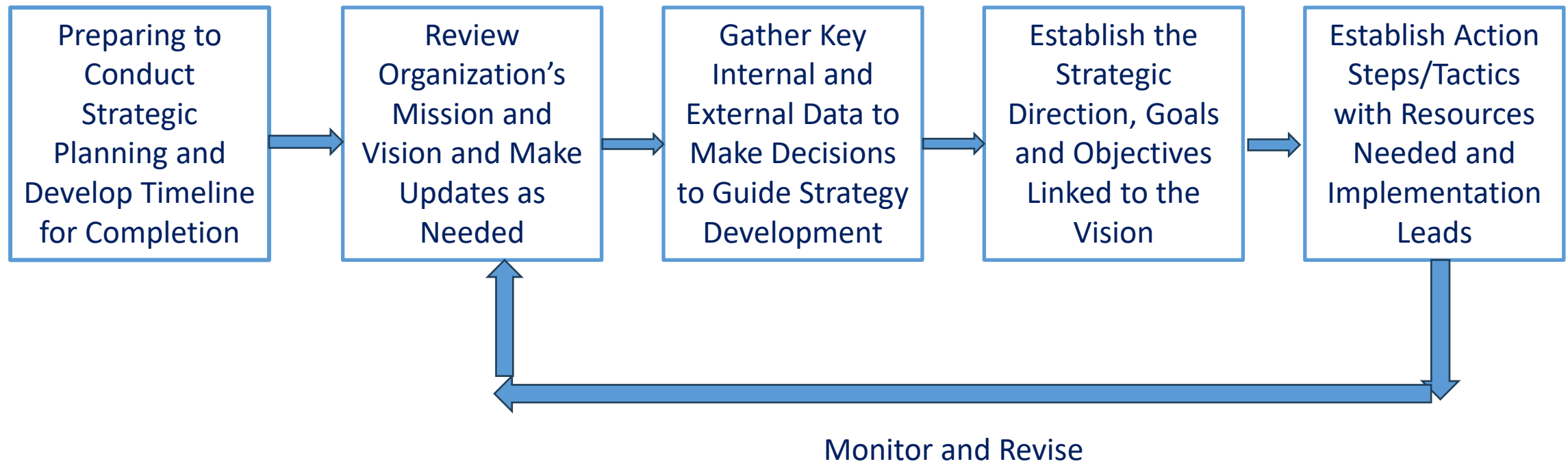
- Strategic planning is the ongoing organizational process of using available knowledge to document an organization's intended direction.¹
- Strategic planning creates a common vision that is focused on the future and can help connect and unite all parties in the organization.
- Strategic planning requires focused decision-making that is rational, intentional, and supported by good and accurate data.
- The process of strategic planning helps the organization assess its progress towards achieving the goals and objectives.
- Strategic planning, when done successfully, will help the organization be strategically managed.
- The process of doing planning shows the commitment of the organization to serving the needs of the community for a long time.



Responsibility for Doing Strategic Planning

- The responsibility for overseeing the planning process and approving the strategic plan rests with the organization's Board of Directors.
 - Some boards have a planning committee to oversee the process.
- The executive leadership team (CEO/executive director) should make sure the strategic plan gets completed and is responsible for implementing it.
- If the team lacks the experience in doing strategic planning, the hiring of a consultant to help guide the process should be considered.
- Individuals to consider including in the strategic plan process include:
 - Executive Leadership
 - Board Members
 - Community Stakeholder/Leaders
 - Volunteers (especially if the organization is volunteer based)
 - Key Management Personnel
 - Staff
 - Current and Former Clients/Patrons

Strategic Planning Model





Strategic Planning Process

- Doing pre-planning before beginning the process.
 - Determine the organization's readiness for strategic planning
 - Identify who will be involved in the process
 - Select what strategic planning model will be used
 - Develop a timeline for completion
- Review the organization's mission and vision statements.
 - Review for clarity and relevancy
 - A mission statement succinctly declares an organization's foundational purpose, guiding its identity and philosophy while informing both internal and external audiences.²
- Conduct the environmental assessment.
 - Collect data/information on the organization's internal operations and external environment
 - Gather pertinent and timely data
 - Information can be both primary (collected directly) or secondary (collected by another entity)



Strategic Planning Process

- Determine the organization's strategic direction/focus.
 - What is the organization hoping to achieve that aligns with the mission
- Establish the organization/program goals.
 - What are the long-range priorities for the organization that will help it achieve its vision?
- Set organizational objectives that support the goals.
 - Goals may have several shorter-term objectives
 - Use the SMART methodology in setting objectives (Specific, Measurable, Achievable, Relevant, Time-bound)
- Develop tactics/action steps to support the achievement of each of the objectives.
 - Tactics identify the resources needed, specific actions to be taken, and who will be responsible for operationalizing them
 - Identify potential barriers/challenges in meeting the tactics



Strategic Planning Process

- Maintain continuous communication and ongoing reviews with the board and leadership on the progress of the plan.
- Compile the information gathered during the process into the strategic planning document.
 - Executive summary (1 to 2 pages summarizing key information from the strategic plan)
 - Review of the mission and vision
 - Key findings from the environmental assessment
 - Discussion of the strategic direction the organization will pursue
 - Summary of the goals and objectives
 - Appendices containing various information (e.g. organization chart, planning committee members, summary of key programs/services, etc.)
- The board should review and give formal approval of the strategic plan.
- Communicate key information from the strategic plan with those who will be responsible for its implementation.



Strategic Plan Goal and Objective Table

Goal 1:			
Objective 1.1:	Action Steps/Tactics	Measure	Time Frame
Objective 1.2:			
Objective 1.3:			



Implementing the Strategic Plan

- Key sections of the goals/objectives/tactic should be assigned to individuals/groups for oversight and completion.
- Develop a timeline for the goals/objectives with key targets/milestones.
- Make sure everyone is clear about the goals/objectives/action steps and their roles.
- Review progress in meeting targets on an ongoing basis.
- Tie the strategic planning cycle to the budget cycle to ensure resources are allocated to implement the plan.
- Maintain ongoing communication regarding issues/challenges/roadblocks.
- Adjust goals, objectives, and tactics as needed based on performance against targets.



Monitoring and Updating the Strategic Plan

- The strategic plan should not be seen as a static document but one that needs to be updated and changed based on changing dynamics and issues the organization encounters.
- One advantage of monitoring and evaluation is to ensure that the organization is following the direction established during strategic planning.³
- Regularly review the progress of the plan against key benchmarks/targets.
- Be proactive in identifying roadblocks that may arise in implementing objectives or tactics.
- Conduct periodic updates to the goals/objective/tactics based on internal and external dynamics.
- Establish the red/yellow/green process for monitoring goals/objectives and progress in achieving them (Red= Not on track, Yellow= Some focused effort is needed to stay on track, Green= On track to achieve the goals/objectives).
- Discuss the impacts of budget and financial constraints on the strategic plan.



Communicating the Strategic Plan

- A key part of implementing the strategic plan is making sure it gets communicated across the organization.
- Identify the key audiences to communicate the results from the strategic plan and what messages will be shared with each group.
- Having a *strategic communication plan* to communicate your strategic plan is the best way to ensure everyone in your community is both informed and on board.⁴
- Develop a communication plan regarding specific steps and venues to share the key components of the plan.
 - Share key information from the planning process with interested donors/funders for your programs and services.
- Allow for feedback and input regarding the key findings from the planning process.



Successful Strategic Planning

- Successful strategic planning should lead to action in implementing the goals/objectives/tactics.
- Strategic planning helps the organization develop a strategic mindset.
 - A strategic mindset helps the organization be strategically managed
- The organization is able to proactively deal with obstacles and challenges in its environment.
- Successful strategic planning helps the organization align around the vision and goals.
- Strategic planning assists with good fundraising practices.
- A well-developed strategic plan helps the organization stay on track and leads to long-term success.
 - Traditional strategic planning processes offer a structured methodology resulting in a comprehensive roadmap for nonprofits' long-term success.⁵



Conclusion

- Successful strategic planning helps provide a roadmap for the organization to move forward.
- Following a defined process that includes pre-planning and specific steps to complete the strategic plan can help ensure success.
- Strategic planning provides organizational clarity and a common basis of understanding at all levels regarding what the priorities are and the resources needed to achieve the goals/objectives.
- The organization's leadership should be committed to strategic planning and see it as a valuable tool in navigating forward.
- Good strategic planning results in a strategically managed organization that can weather the upcoming challenges and obstacles encountered.



Online Resources

- **Harvard Business School Online**

- Provides articles and training on how to do strategic planning.

<https://online.hbs.edu/blog/post/why-is-strategic-planning-important>

- **Management Library**

- Provides articles and resources on how to do strategic planning.

<https://management.org/strategicplanning/implementing-plan.htm>

- **Association of Fundraising Professionals**

- Site offers resources on doing strategic planning for nonprofits.

<https://afpglobal.org/>

Reference Notes

¹Catherine Cote, “Why is Strategic Planning Important,” Harvard Business School Online, October 6, 2020, <https://online.hbs.edu/blog/post/why-is-strategic-planning-important> (accessed October 25, 2025).

²Nancy W. Comstock, “Mission and Vision Statements,” Ebsco, 2024, <https://www.ebsco.com/research-starters/business-and-management/mission-and-vision-statements#mission-and-vision-statements> (accessed October 22, 2025).

³Rory Hart, “Strategic Plan Essentials: Monitoring and Adaption,” Management Library, July 19, 2023, <https://management.org/strategicplanning/implementing-plan.htm> (accessed October 23, 2025).

⁴New Leaders, “Communication is Key: Three Strategies to Activate Your District’s Strategic Plan,” February 20, 2024, <https://www.newleaders.org/blog/communication-is-key-three-strategies-to-activate-your-districts-strategic-plan> (accessed October 21, 2025).

⁵Jaron Bernstein, “The Revolution of Nonprofit Strategic Planning: Fusing Tradition with Innovation,” Association of Fundraising Professionals, August 5, 2024, <https://afpglobal.org/revolution-nonprofit-strategic-planning-fusing-tradition-innovation> (accessed October 22, 2025).