

## Trends in Strategic Planning for Nonprofits

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*I recently attended a training sponsored by The Board Network in Portland conducted by Sandy Hughes, from BoardSource. One of the topics Ms. Hughes covered was the Board's role in Strategic Planning. I became interested in researching what other experts had to say and created a summary of these findings. The following is an excerpt from the final four-page report by Benoit Consulting Services.*

### **The Board's role in strategic planning**

The full planning group, that will create the vision and direction for the organization, is shifting toward the full Board and key staff - away from a subcommittee of the Board. The Board chair, chief executive and one or two key staff members can develop the general planning process involving consultants or the board at the appropriate time.

### **Planning activities or phases**

The planning process begins with gathering internal and external information. This information may be gathered by a Board members, staff, or consultants. A summary is presented to the full planning group. This group then engages in a long-range (five to ten years) visioning activity. The outcome is a (pie-in-the-sky-type) vision statement, a (doable) mission statement, three to six broad values statements reflecting the ideal or desired character, philosophies, and operating style of the organization. Finally, five to ten strategic issues needing attention over the next three years are identified.

### **The strategic plan**

Key management staff create the actual strategic plan by reviewing the internal and external information in depth and then, using their expertise, create five to ten strategic goals or imperatives that will be operationalized over the next three years. The full Board will ultimately approve these goals.

### **Institutionalization of the strategic plan—ease of implementation**

Organizations are creating “mini” strategic plans for all program and operational areas that reflect the vision, values, and strategic goals of the overall organizational strategic plan. These strategic plans should be in a format that reflects your organization structure and thus promotes the carrying of the planning process down to department and program levels. For example, the same strategic planning process would be duplicated for each program and department—Finance, HR, Development, etc. The strategic plan becomes the activity of departmental meetings because each group has its own goals to track. Monitoring and reporting out becomes a normalized function for every supervisor and does not fall to an administrative “planning” position.

### **Internal analysis**

Analysis of the organization's current competency should include as much of the following as possible:

- An analysis of client outcome results,
- Client satisfaction rates,
- Some measure of organizational culture or employee satisfaction, and
- The strengths and weaknesses of all program areas and administrative functions.

### **External analysis**

Speaking of normalizing the plan, external trends are monitored at intervals every year and not just every three years. For nonprofits, this includes monitoring new developments in client intervention outcomes as well as marketing and competitive analysis that is the primary focus of for-profit strategic planning.

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