Strategic Planning Tools for Success

Kimberly L. Mackall MDiv., LCPC

Dr. Violet L. Ford. EdD

KLM Consulting Group LLC.

Klmconsultinggroup.com

Why Build a Strategic Plan?

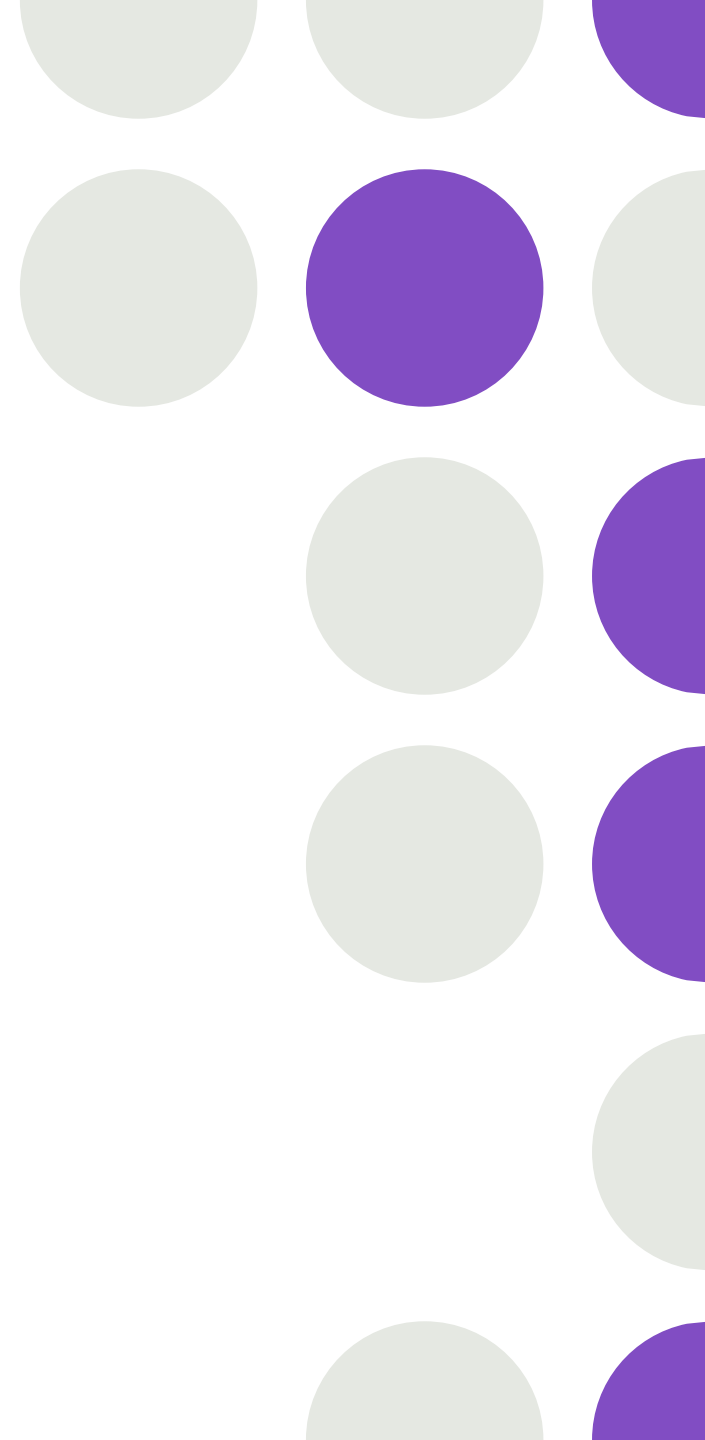- Strategic plans help make informed decisions to stay **true to your mission**

- Additionally, it helps:

Maintain a productive organizational structure

Engage stakeholders more intentionally

Focus on business outcomes (i.e program benchmarks and fund development)

Prepare for Strategic Planning

- Revisit and refine your vision and goals as needed.

- Involve key stakeholders – embrace diverse perspectives

- Ensure senior leadership is positioned to champion the strategic plan through proper communication, endorsement of the plan, and encourage team buy-in

- Be honest about strengths and weaknesses.

- Be open to change.
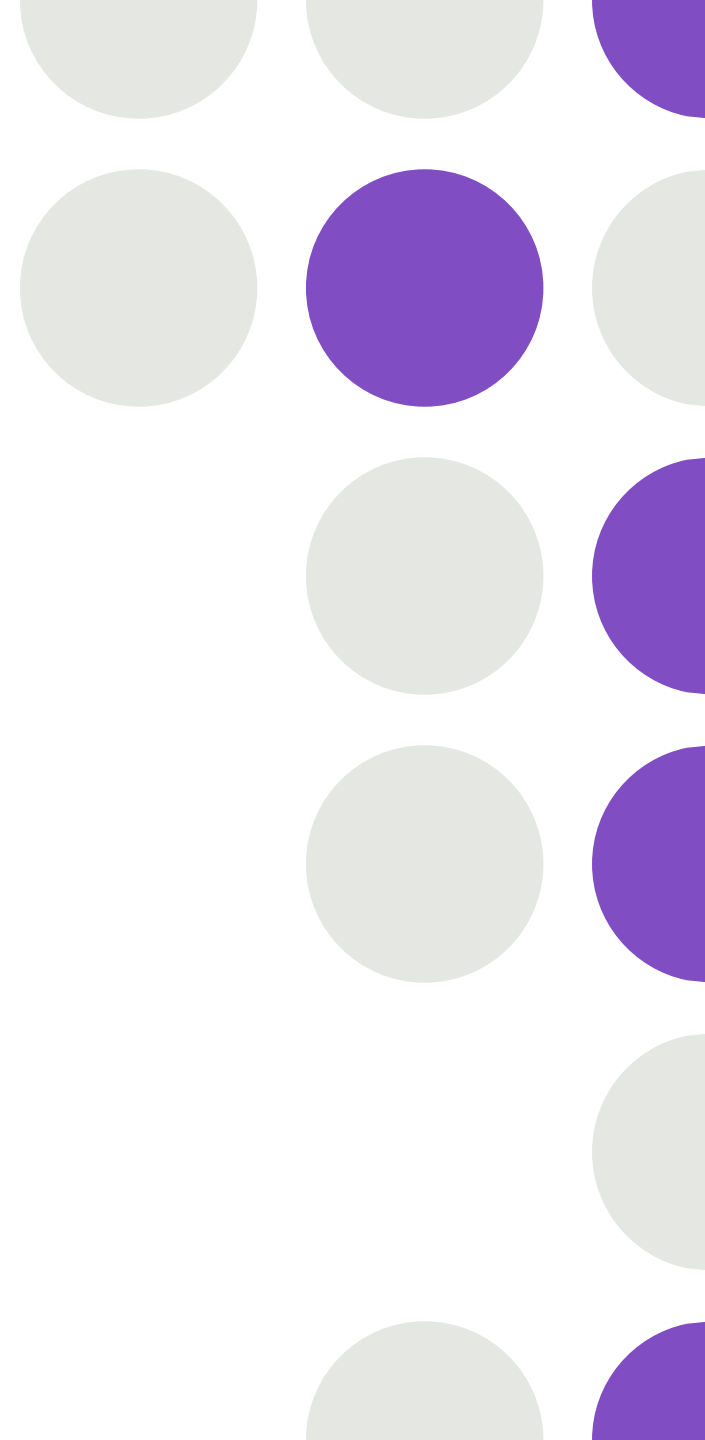
STEP ONE: Needs Assessment Data Collection

What are the needs of your organization? What are your greatest challenges? What knowledge, skills, and/or resources are needed to accomplish goals?

Current Strategy Review: previous strategic plans and/or SMART goals, customer and team feedback, pertinent regulations, SWOT

Literature Review: industry best practices, what similar businesses have done to resolve problems and address problems
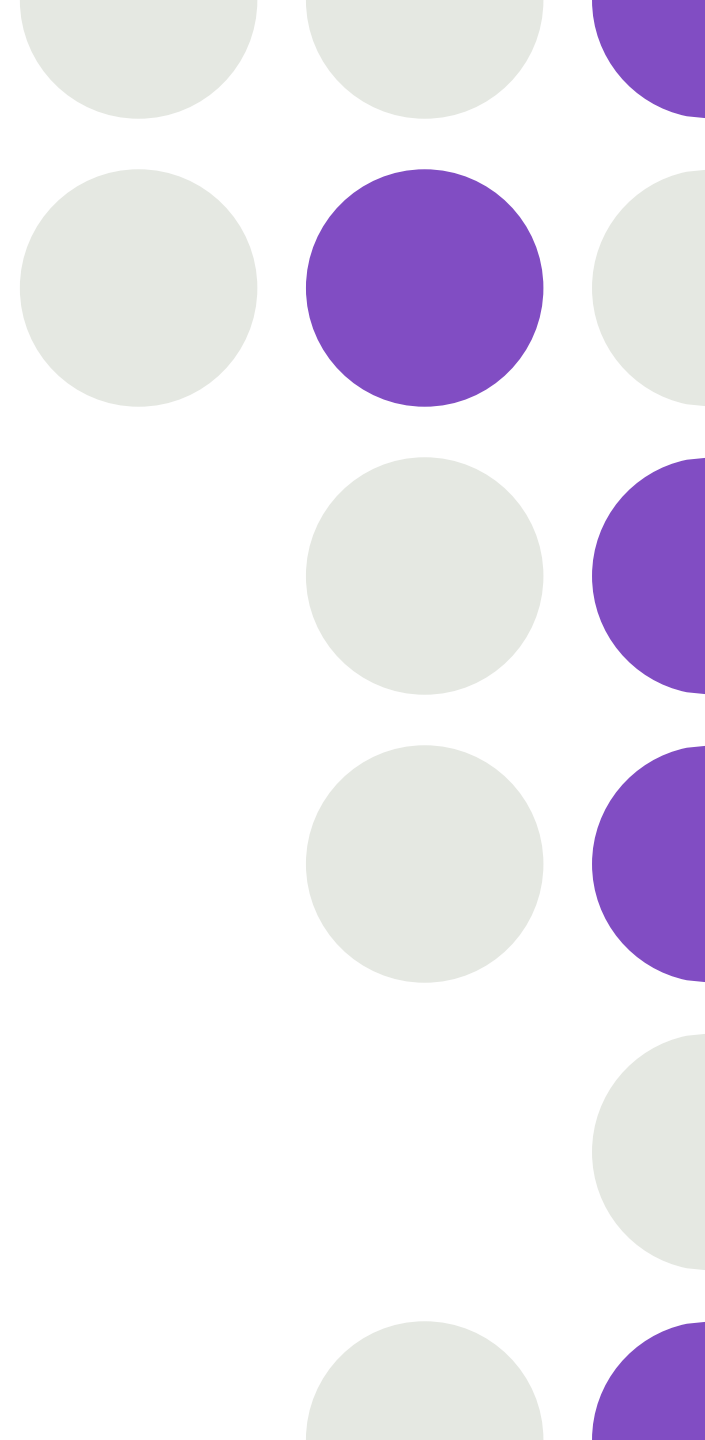
Needs Assessment Data Collection: Current Strategy Review

- Previous strategic plans – How well have you stayed aligned? What did you accomplish and what is unaccomplished?

- Previous SMART goals – How well have you met your goals?

- Customer feedback – Anonymous surveys, focus group discussions, and/or interviews

- Team feedback - Anonymous surveys, focus group discussions, and/or interviews

- Pertinent regulations – How well have you stayed in compliance with regulations pertinent to your organization?

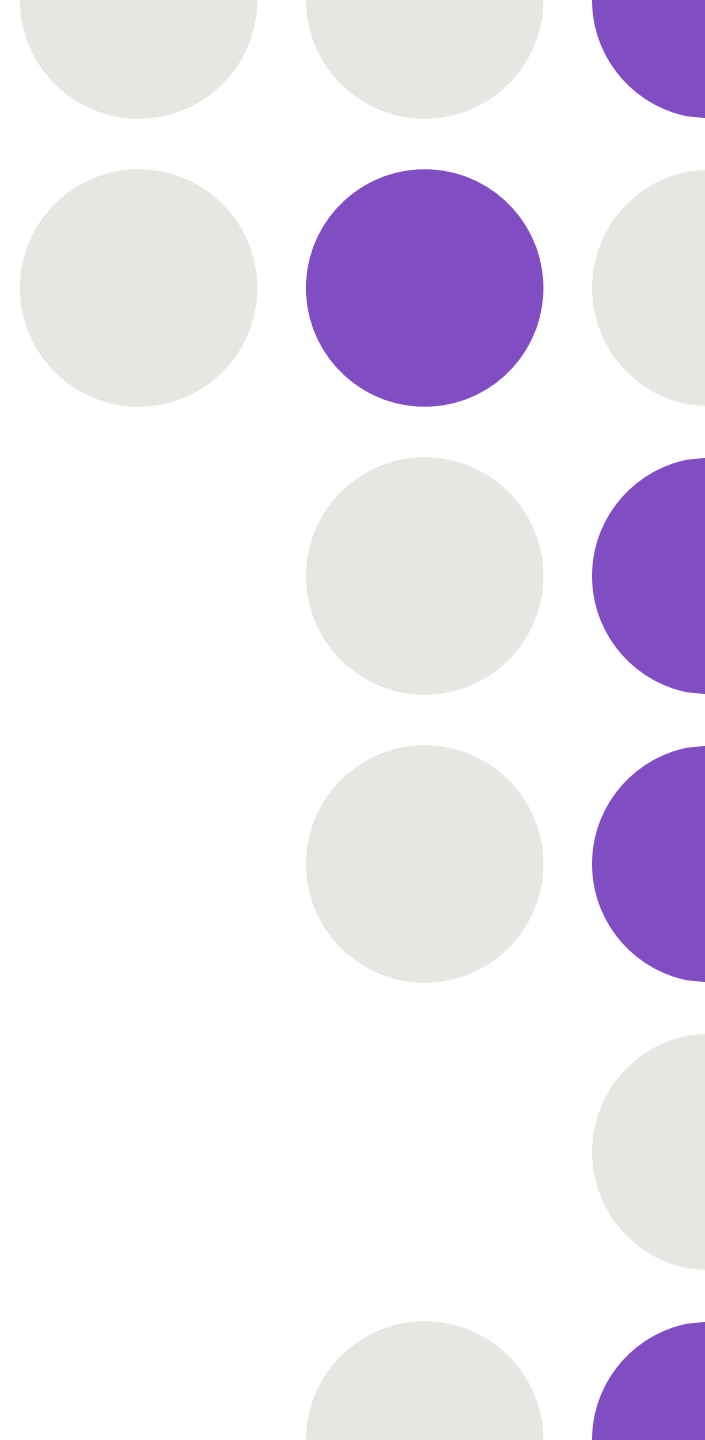- SWOT – Open and honest conversations with the team.

Needs Assessment Data Collection: Literature Review

- Industry best practices
  - What achievements are other organizations like yours attaining?
  - What actions have organizations similar to yours taken to address issues?

STEP TWO: Analyze Data

- To what degree have you met your previous organizational goals?

- What was the consensus of the conversations with your team and customers?

- To what degree have you stayed within regulations?

- What did you learn from your SWOT discussion?

- What did you learn from reviewing industry best practices?

Step Three: Develop SMART Goals to Move Forward for Each Area of Focus

- Specific: Define your goal with as much detail as possible. Think about who, what, where, and when

- Measurable: Track the outcome and your progress (this is a continuous improvement process)

- Action: What will you do to attain your goal?

- Realistic: Is your goal achievable?

- Time-oriented: How long will it take to complete?

STEP FOUR: Craft an Action Plan with a Logic Model

- Logic models enable organizations to:
  - Measure continuous improvement and manage quality through evaluation
  - Address the increasing requirements for outcome measurement and improvement measurement
  - Build a good understanding of expectations for resources, customers reached, and results
  - Identify projects that are critical for goal attainment
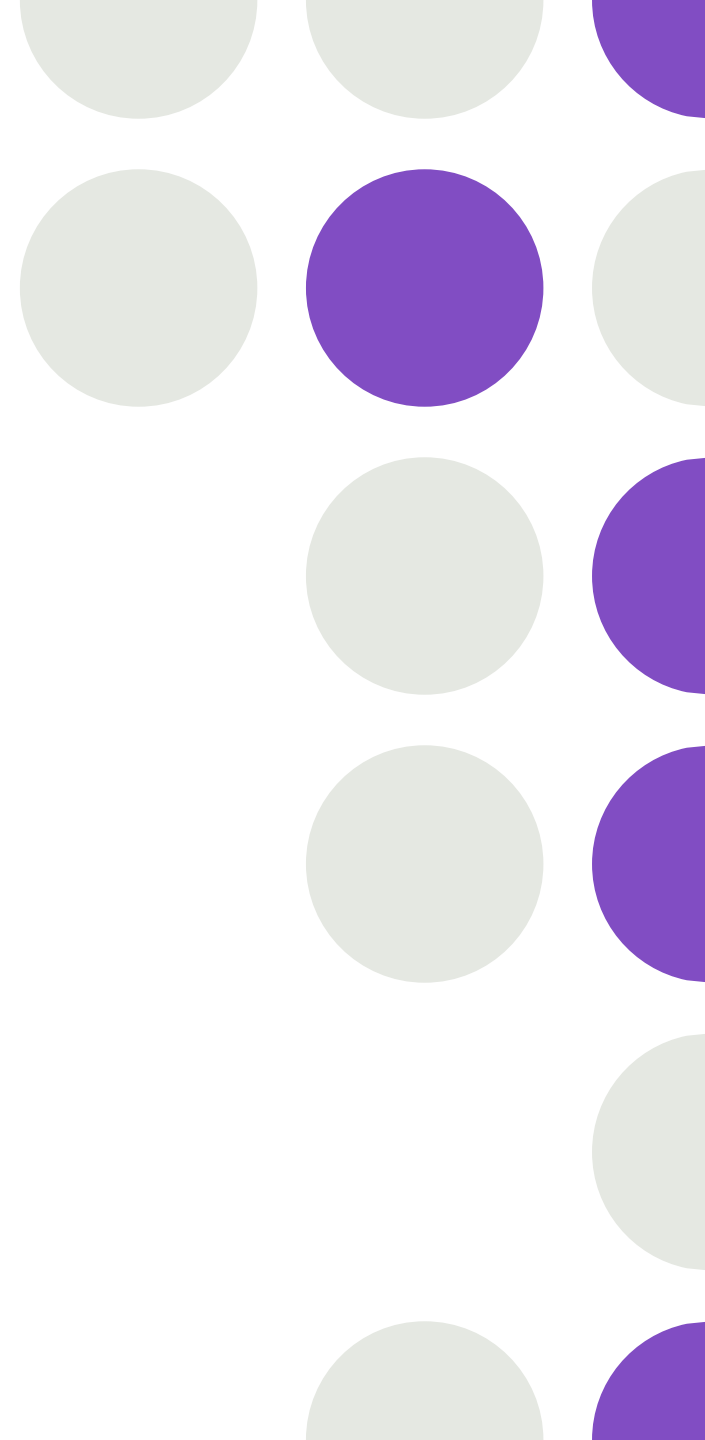
Logic Model Elements

Tip: Determine the needed resources, activities, outputs, reach, outcomes, and external influences for each SMART goal.

Resources: human and financial resources required to support the business

**Activities:** includes all action steps necessary to produce program outputs

Outputs: products, goods, and services provided to customers

Reach: resources, people reached (who benefits), and results

Outcomes: changes or benefits resulting from activities and outputs (short, intermediate, and long term)

External influences: External influences that may hinder you from achieving outcome goals
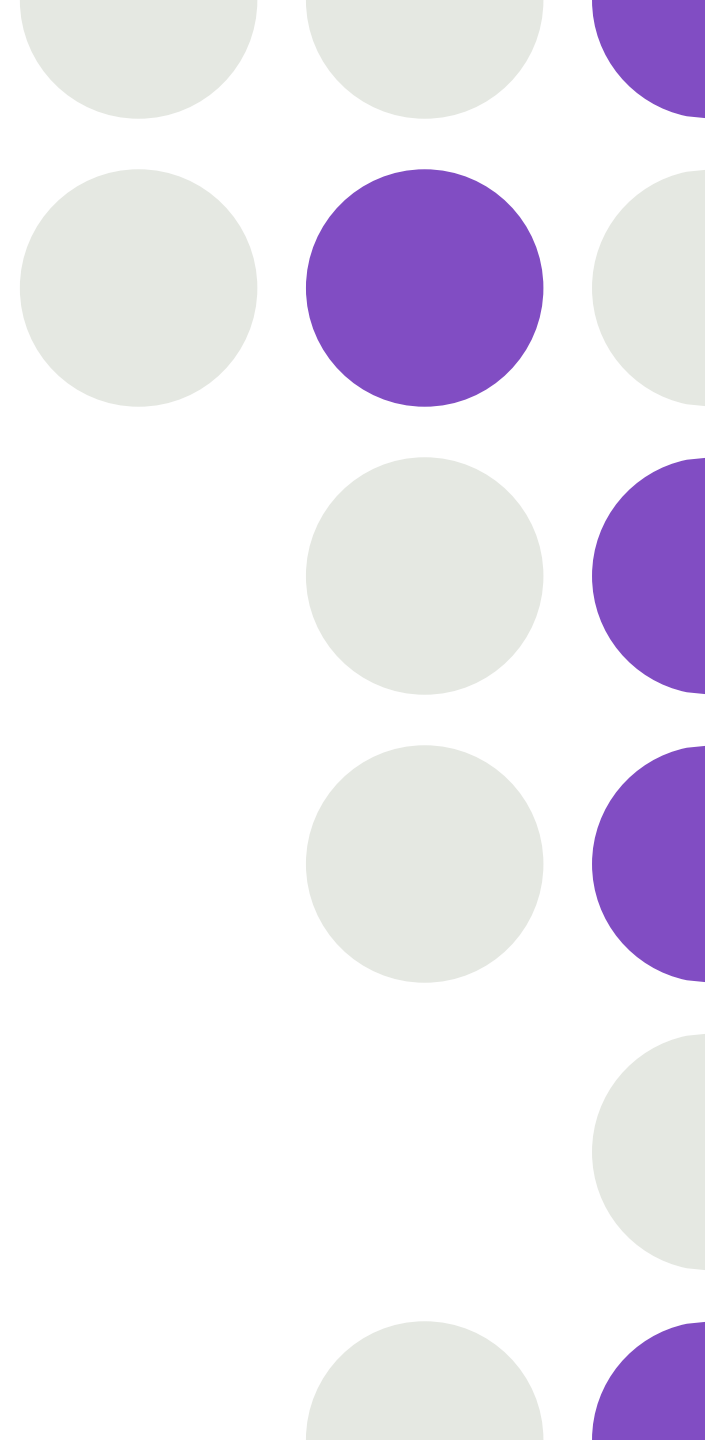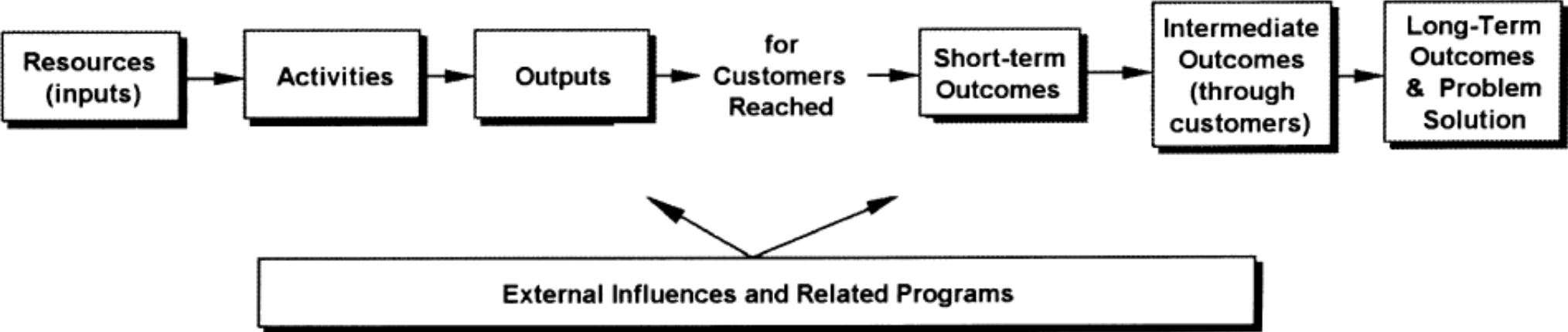
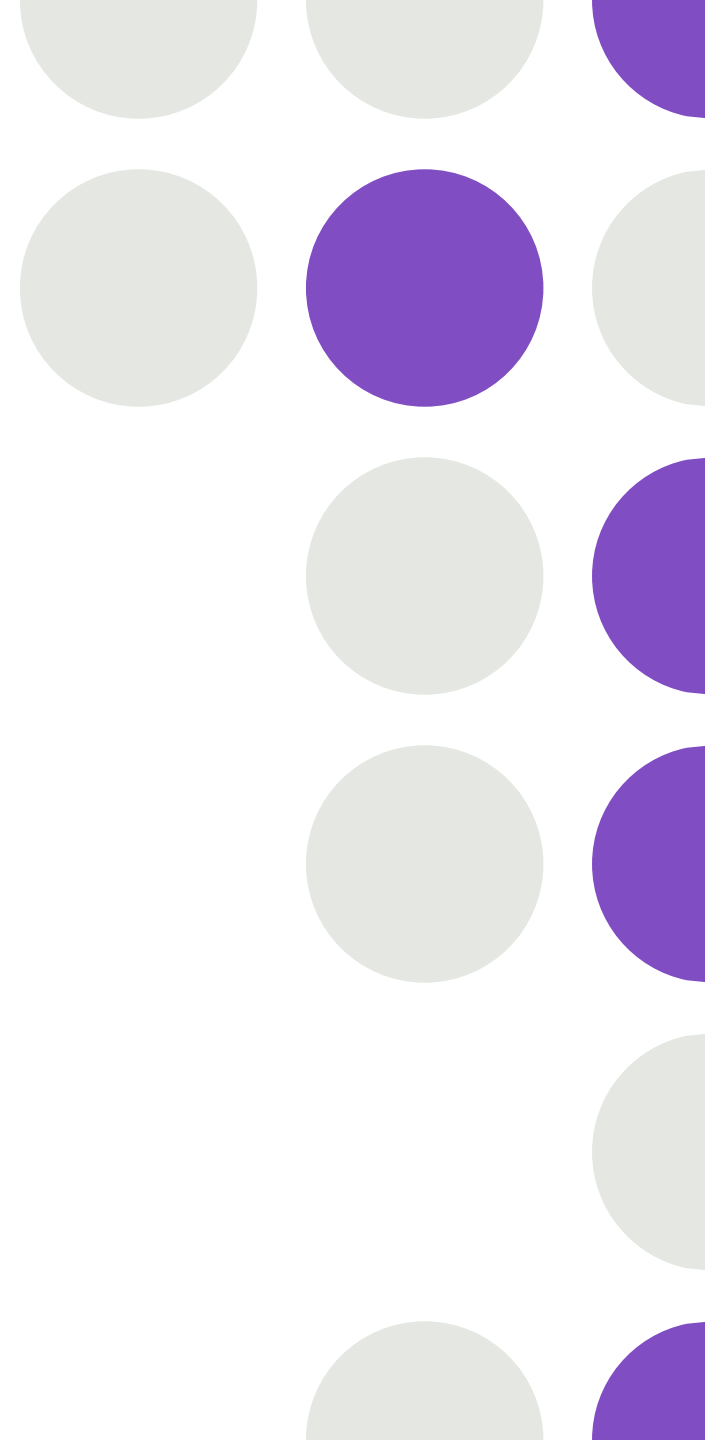# Elements of the Logic Model


Fig. 1. Elements of the Logic Model.

STEP FIVE: Develop Action Plans

- Using the Logic Model, break down each strategic goal into actionable steps with clear timelines, responsibilities, and performance indicators to track progress.
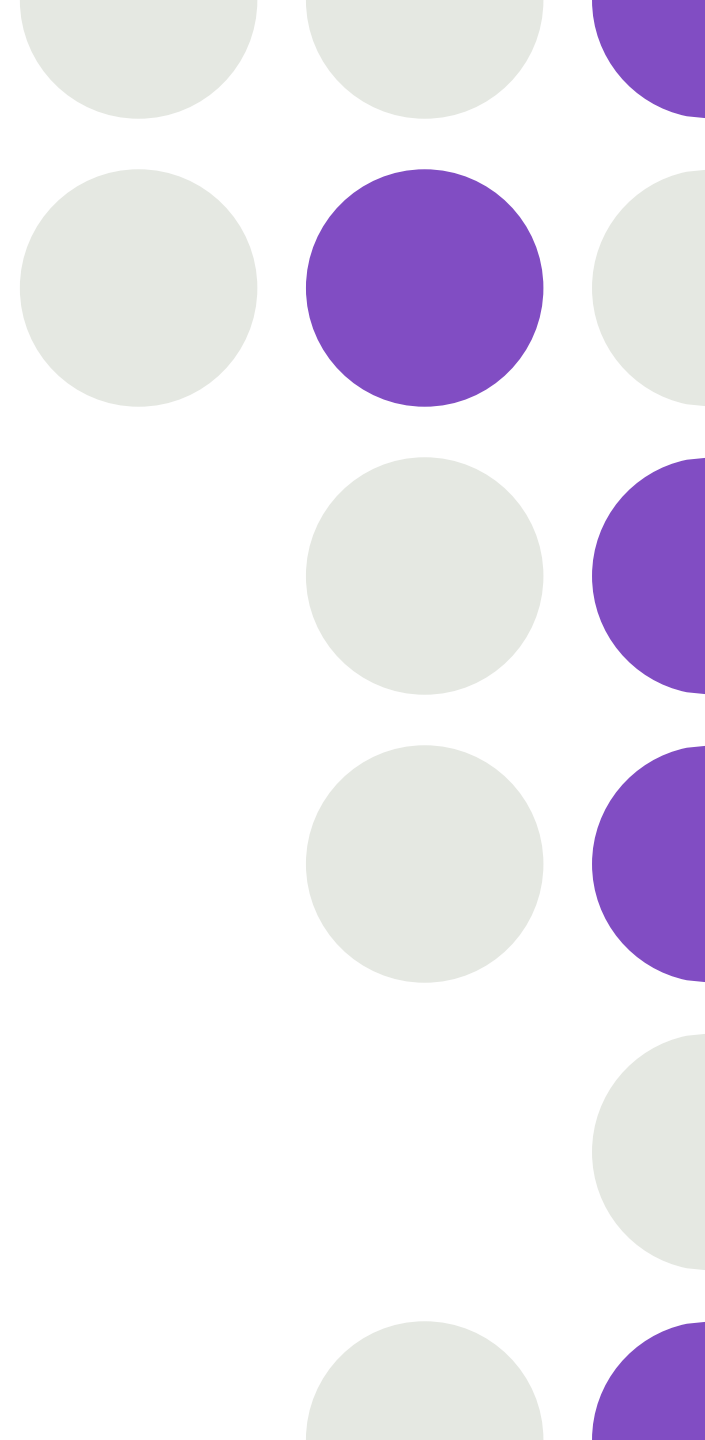
STEP SIX: Effectively Communicate Your Strategic Plan

- Ensure that your strategic plan is communicated clearly and consistently throughout your organization to align everyone towards common objectives.

  - Consider an organizational retreat, town hall meeting, visual presentation, one-on-one meetings, or other creative ways to communicate with your team.

  - Reinvision board meetings. Implement the Strategic Board Agenda to incorporate strategic initiatives into your meetings.
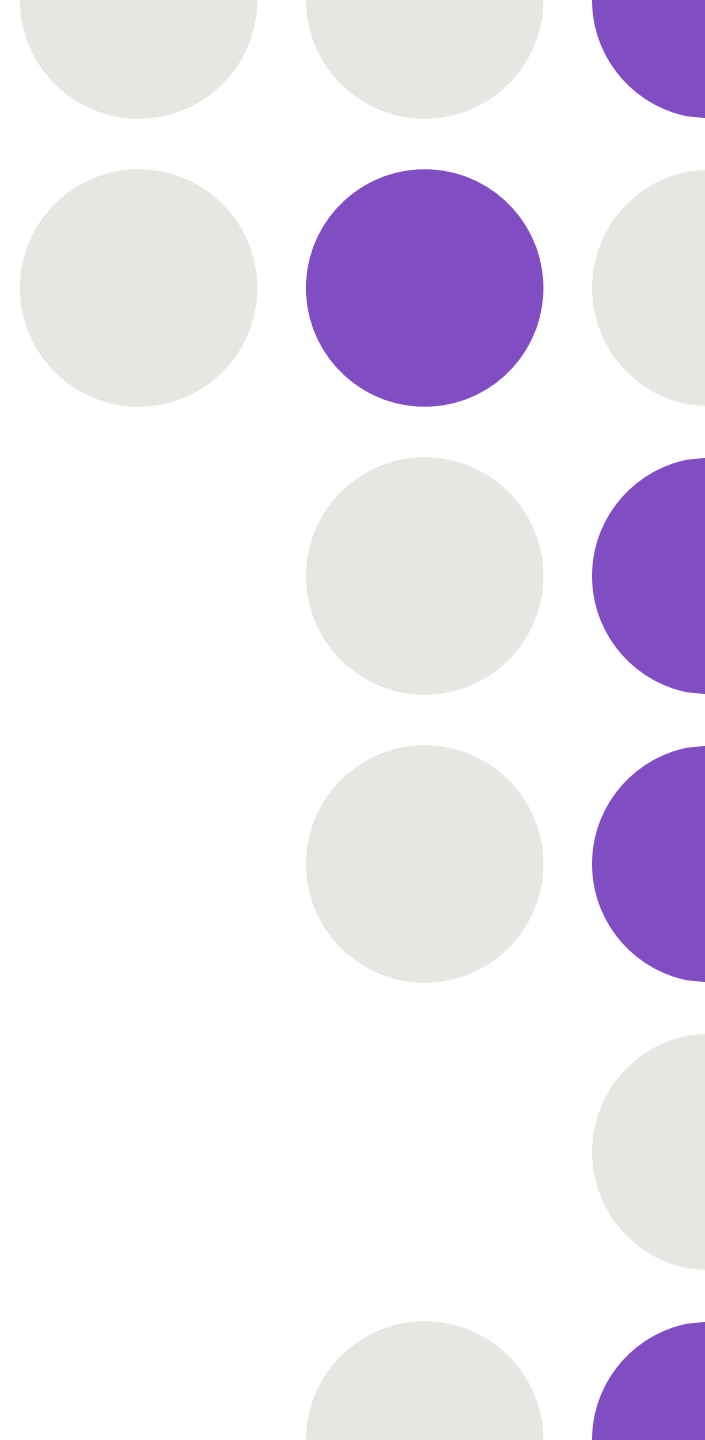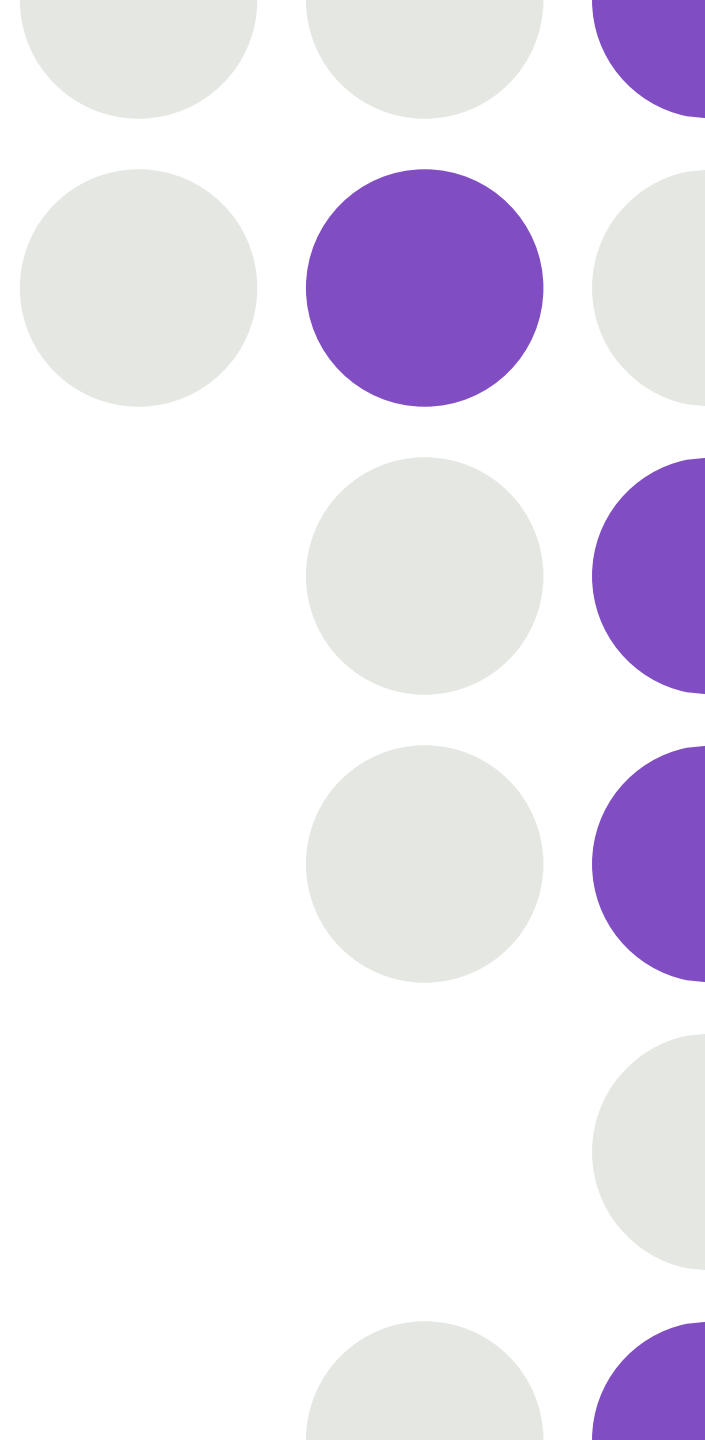
STEP SEVEN: Foster a Culture of Support and Adaptability

- Offer training and development opportunities to enhance the skills and knowledge needed to execute the strategic plan effectively i.e. workshops, courses, or mentoring programs

- Recognize that strategic planning is an ongoing process and be prepared to adjust your plans in response to changing circumstances or new opportunities.

STEP EIGHT: Practice Continuous Improvement

- Encourage regular feedback loops from team members and stakeholders to identify areas for improvement.

- Implement a process for capturing lessons learned and best practices throughout the implementation process.

- Conduct regular reviews or retrospectives to assess progress, identify bottlenecks, and brainstorm potential improvements.

- Foster a culture of experimentation and innovation, allowing team members to propose and test new ideas or approaches.

- Utilize key performance indicators (KPIs) to track progress and identify areas where adjustments are needed.

- Encourage cross-functional collaboration and knowledge sharing to leverage diverse perspectives and insights.

- Continuously seek ways to streamline processes, optimize resources, and enhance efficiency and effectiveness in achieving strategic objectives.

STEP NINE: Celebrate Successes

- Celebrate successes and milestones with staff, clients, funders, allies, and stakeholders achieved along the way, while also recognizing and learning from failures or setbacks.
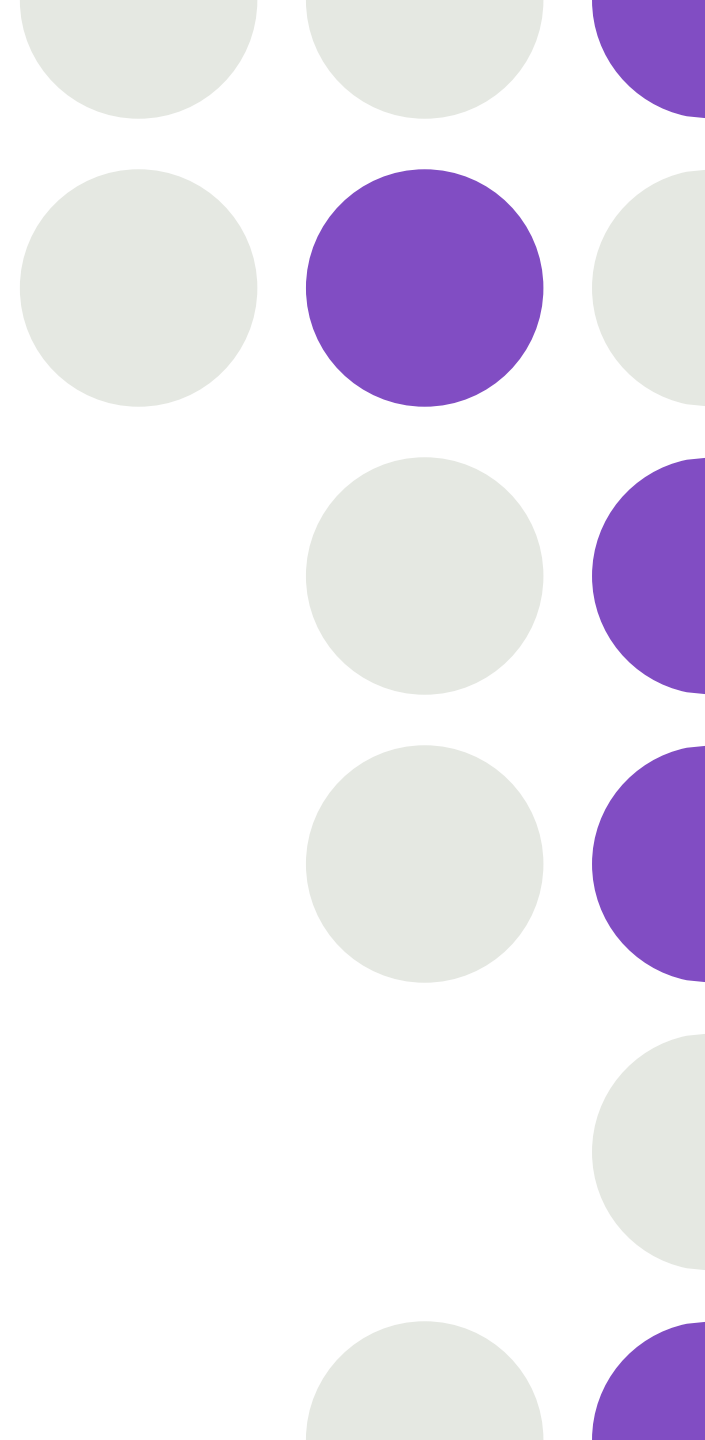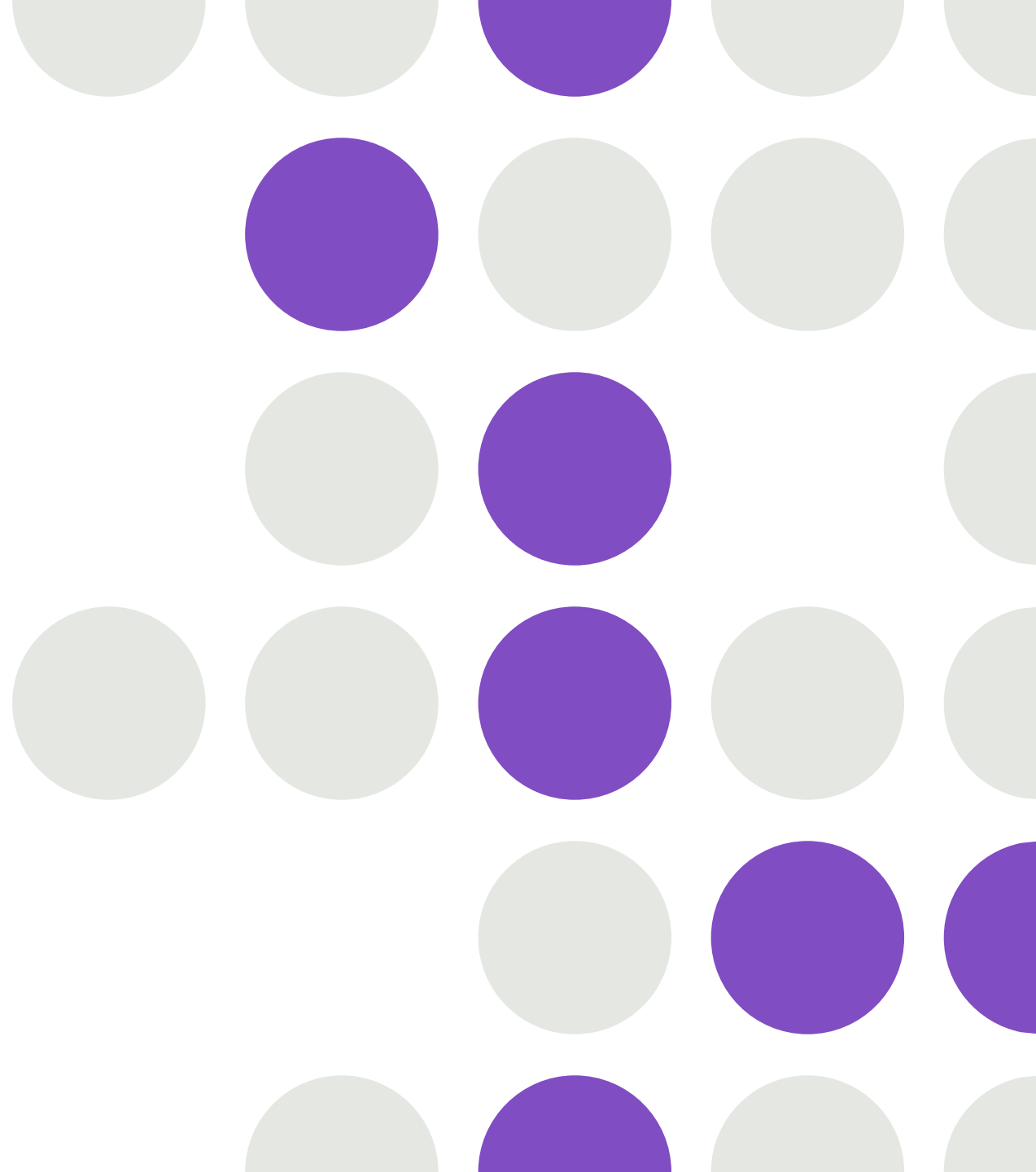
# Operational Excellence

Your Strategic Plan's Secret Weapon

Indicators of Healthy Systems

Cross Departmental Data Exchange

• Requires clear definitions and consistent execution
• Know the key elements that must be exchanged across departments, and organization-wide definitions and understanding of those elements.
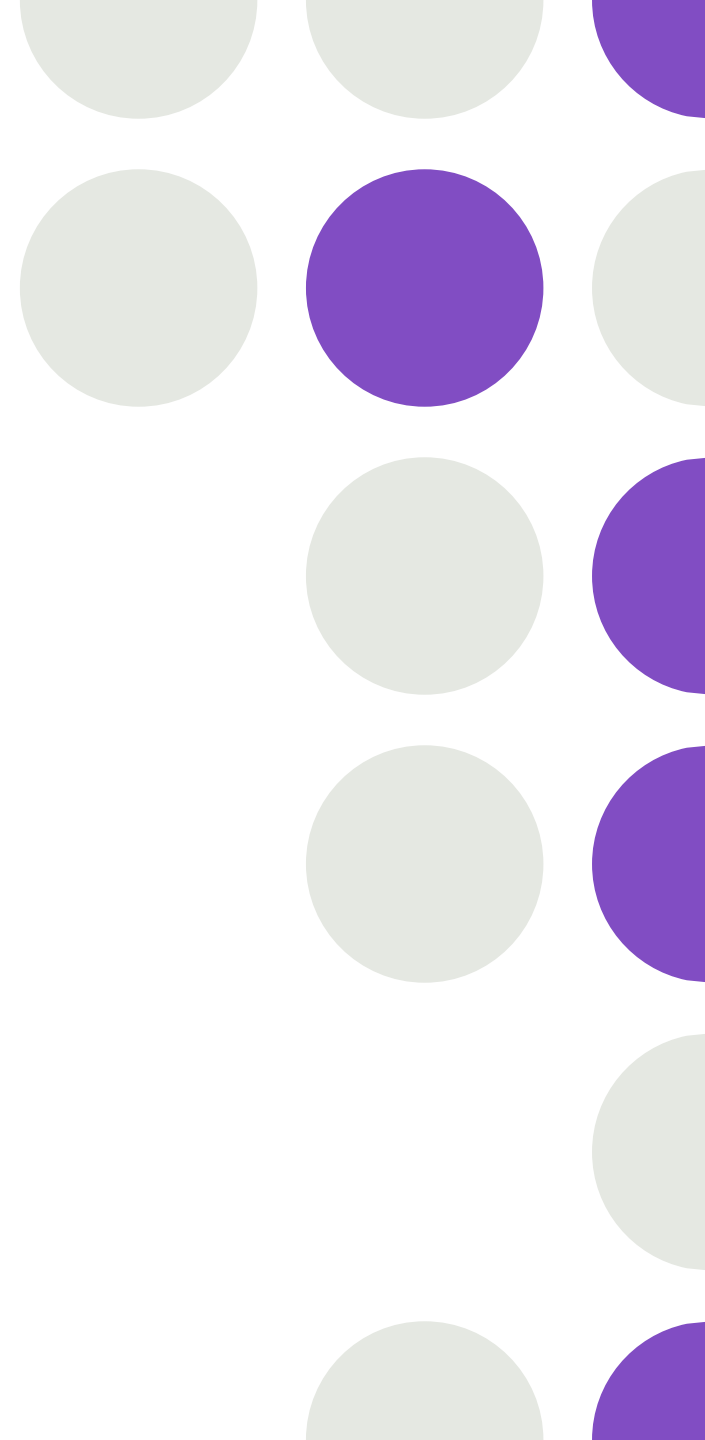
Toolkit

• Conduct whiteboard exercises across departments to understand the key elements
• Make agreements on how the elements are defined.
• Maintain transparency
• Continue to remove silos through continued communication
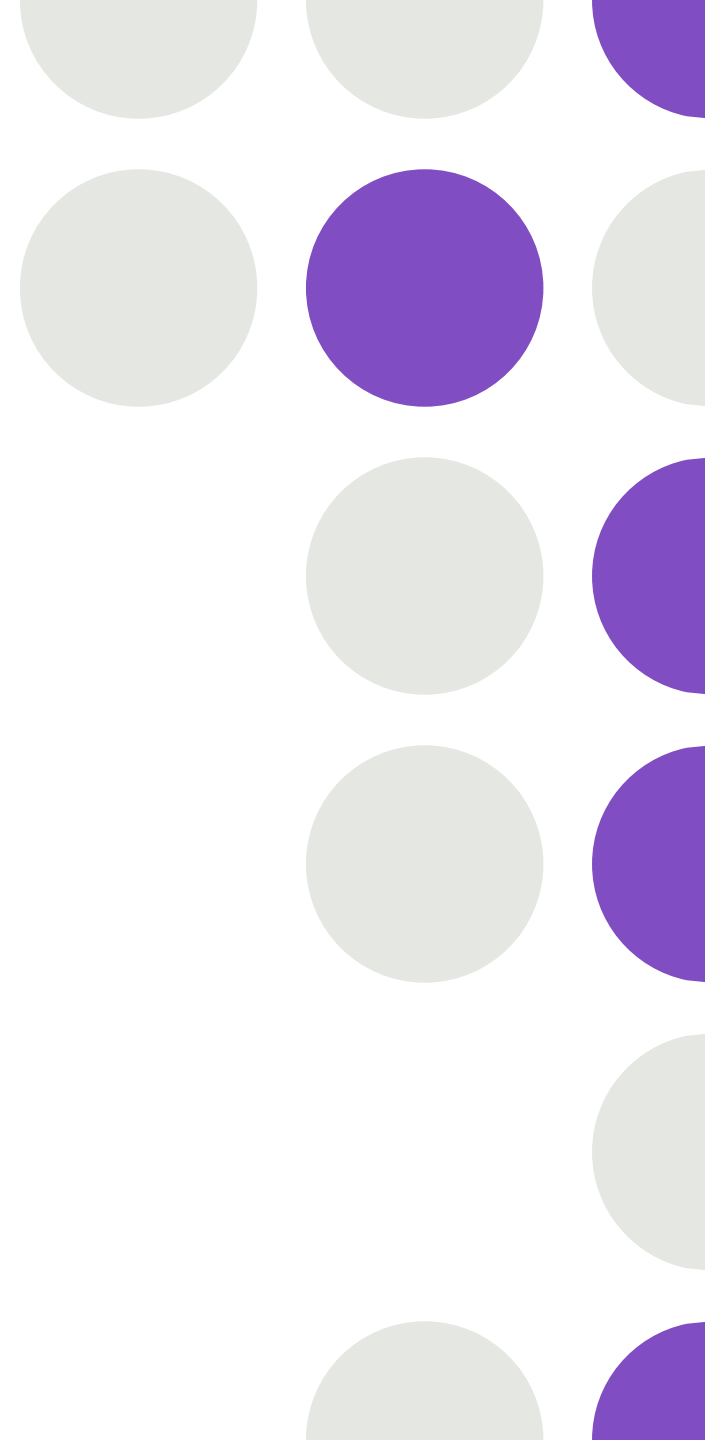
Healthy Systems cont'd

Staff Turnover Is Relatively Low

- The day-to-day "grit in the gears" can also wear people down.

- When processes are clear and well-understood, people can take time away from the office without worrying about all the stuff only they know or can weigh in on.
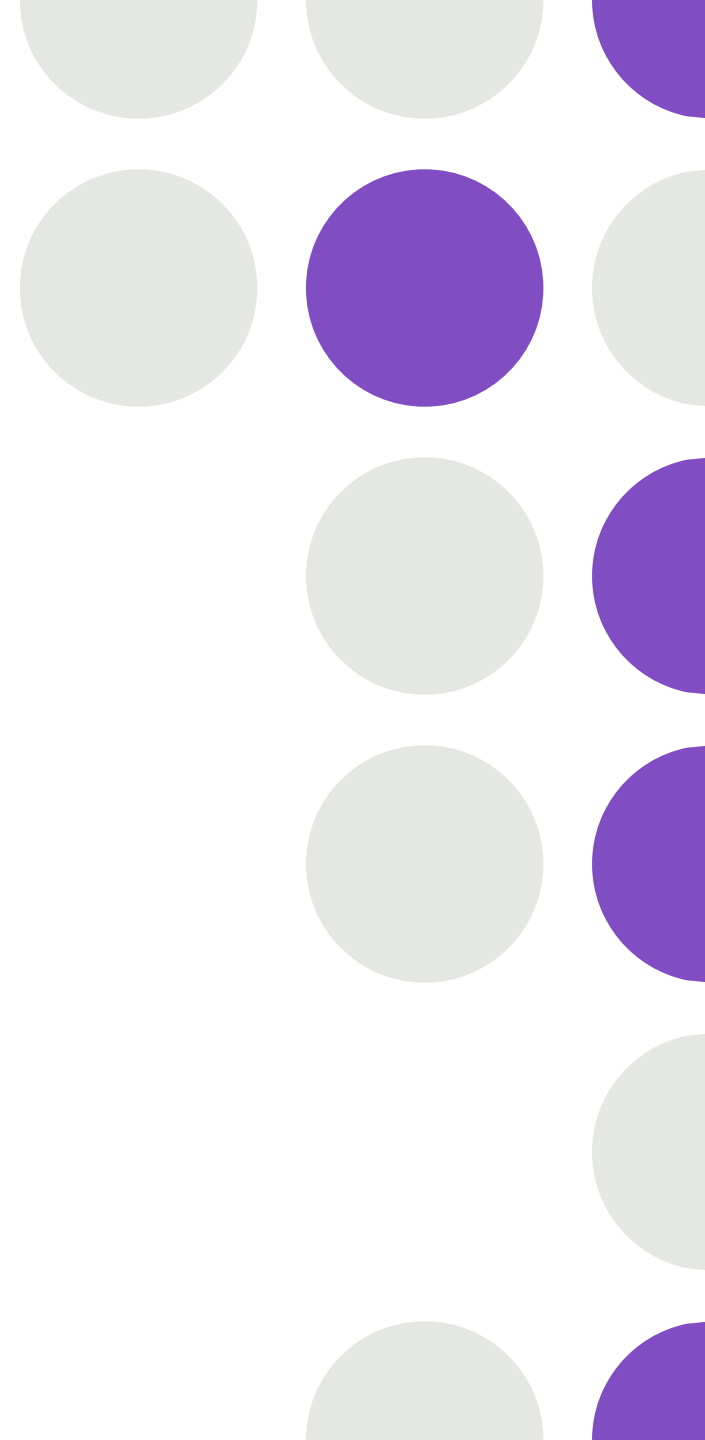
Healthy Systems cont'd

- People understand how their work contributes to the mission, and also how their colleague's work contributes with a good operating system that aligns with the operating model .
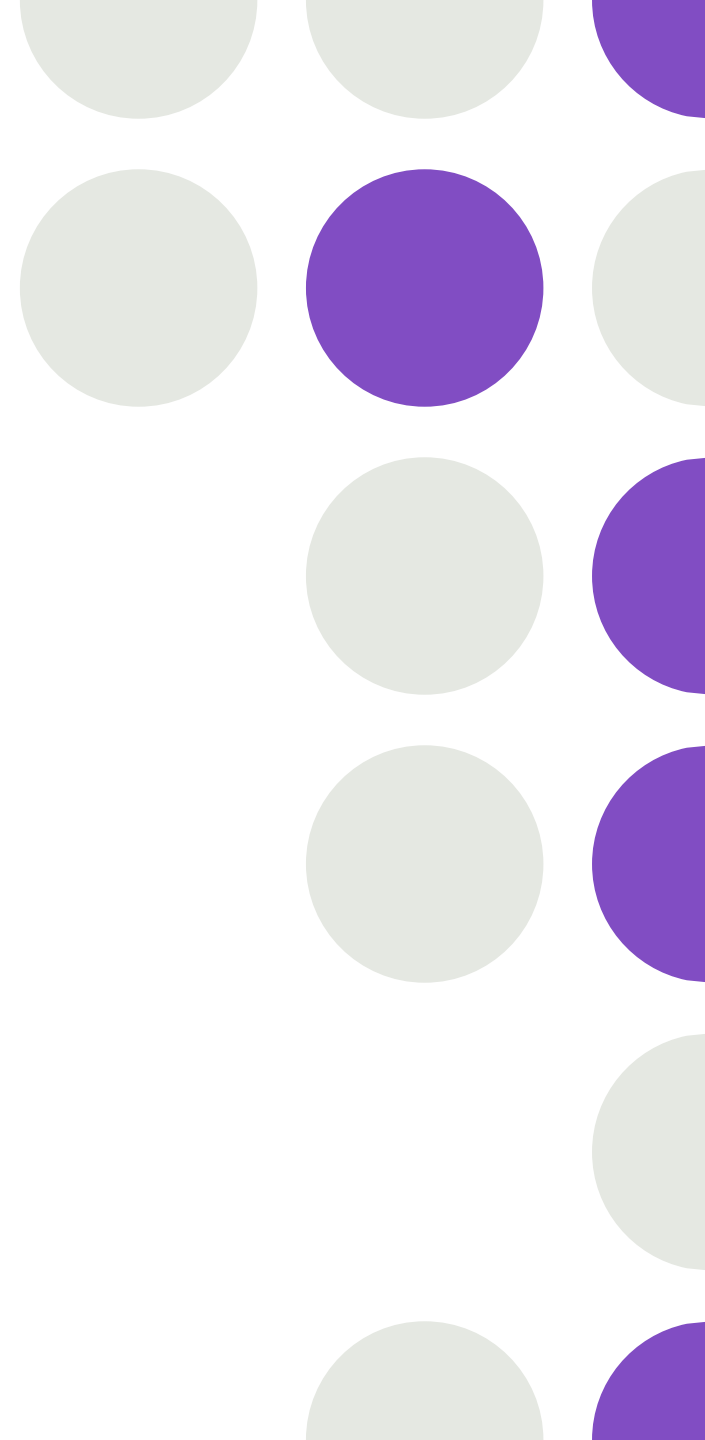
Toolkit

- Develop Key Performance Indicators - indicators of progress towards an intended result. How do you know if your work is making an impact? Leverage historical data to set targets.
- Hire the person and not the position. A candidate who is aligned with your mission, vision, and values with transferrable strengths may be a better fit than someone who has done the job. This creates an engaged workforce and organizational culture.

Healthy Systems cont'd

Less Painful Staff Transitions

- There are no worries about a departure's impact on client service because processes are both documented and managed.

- There are no concerns about permanent increase in work because the team knows that roles are defined. There is no additional expense with hiring an outside consultant to figure out the systems constructed by previous employees because the tools and technology used are well understood and used consistently by everyone.

Healthy Systems cont'd

TOOLKIT

- Create Standard Operating Procedures to optimize workflows that identify bottlenecks and streamline processes.
- Implement cross training
- Shadow others
- Create bench strength and succession planning
- Use interim positions for internal development
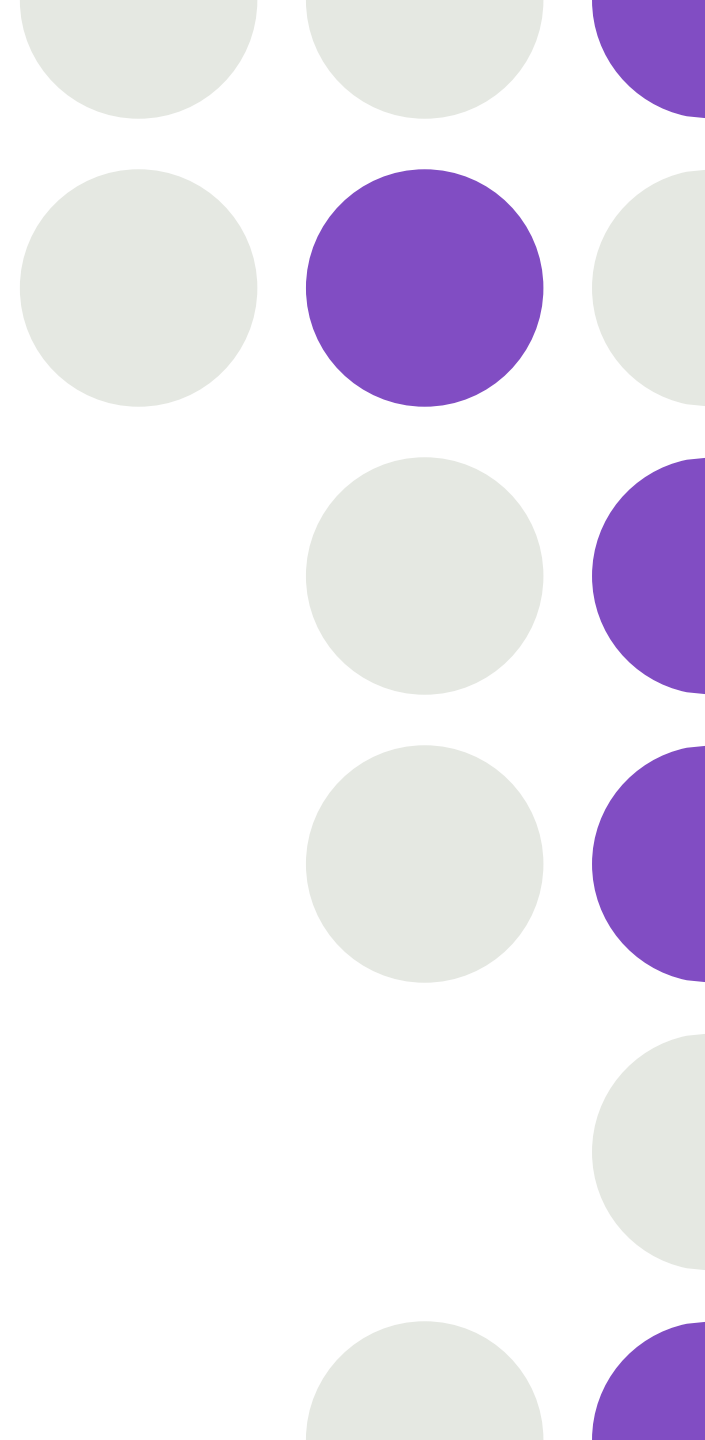
Resources

Non-profit Software (all-in-one databases, screenings, intake, fundraising, donor management)

- Bonterra
- Flipcause
- iDonate
- Classy

Forms/Documents
- Google Workspace
- Type Form
- Survey Monkey
- Excel Spreadsheet

Center of Non-profits
- Membership
- Professional Development
- Networking
- Resources (data)
- Standards of Excellence
- Career Centers
  - Job Postings

Partnerships & Funding

Who Are You Taking Ground With?

- Technology Companies
- Financial Institutions
- Colleges, Universities, and Technical Schools
- Local Small Businesses (coffee shops, retail, entertainment)
- The Arts (museum, dance, music)
- CMCA members

What do you have in your hand?

- How are you leveraging your real estate and assets for your communities' needs?
- What does the community need that you can offer?
- How can you use your land?