

# Strategic Planning (gasp!)

How do you Know When the Time is Right and Where to Start?



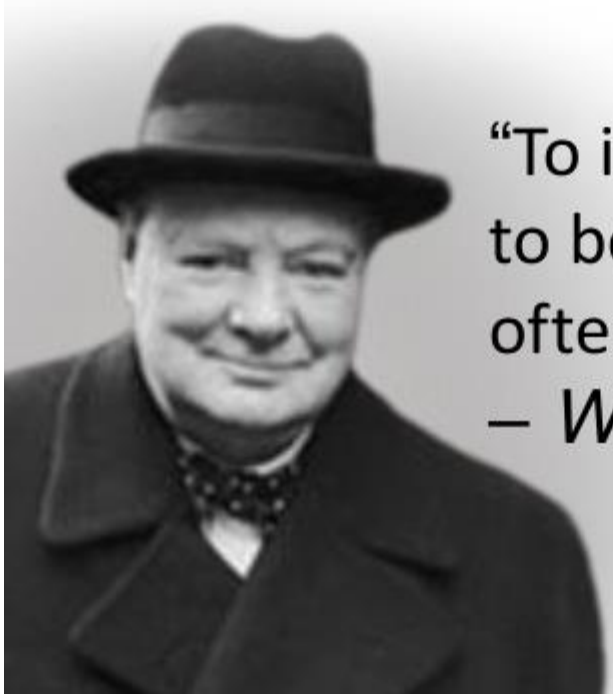
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# Don't Panic.

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“To improve is to change;  
to be perfect is to change  
often.”

– *Winston Churchill*

**Great things  
never came  
from comfort  
zones.**

CHANGE  
IS  
INEVITABLE.  
GROWTH  
IS  
OPTIONAL.

**CHANGE IS**

HARD AT THE BEGINNING  
MESSY IN THE MIDDLE  
GORGEOUS AT THE END

[mariosneokleous.com](http://mariosneokleous.com)



# Why Strategic Planning?

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- The goal of engaging in a strategic planning process is to help guide the leadership and staff in their work.
- Key outcomes will result in clarifying, focusing, and generating consensus around the mission, the work, and the values of an organization.

**AND**

**Must be converted into actionable steps and measurable outcomes.**



# Strategic Planning Overview

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**Strategic planning areas should generally include:**

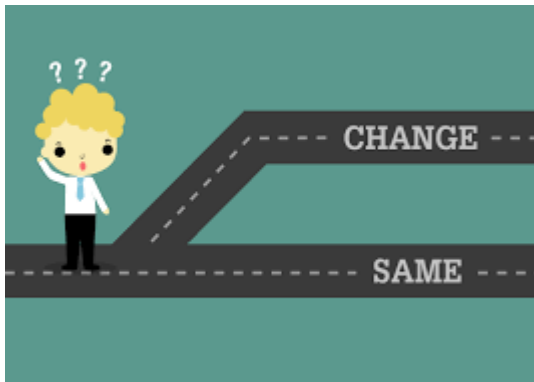
- a mission statement
- an outline of goals, objectives, and activities
- an assessment of current resources
- a strategic analysis



# To Change or not to change?

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How to know if the time is right to engage in a strategic planning process?



- New or young organization
- Leadership change- (*board or executive*)
- Funding shift
- Mergers and strategic alliances
- Previous strategic plan has “expired”
- Crisis



# Planning Considerations:

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- **Cost:** financial and human costs
- **Time:** anywhere from 3-6 months on average
- **Capacity:** willingness, skills & commitment
- **Who:** engagement & buy-in from board and leadership down to staff.
  - Transparent criteria about whose voices will be included are critical. (*Funders, what level staff, consumers, competitors etc.*)



DECISIONS  
DECISIONS  
DECISIONS...

# Alternative Options

- SWOT session related to the immediate issue or need
- Adaptive Planning
- Design thinking strategy & prototyping solutions
- Capacity Building on a focused area
- Value Proposition exploration



# Questions and Audience Participation

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# Resources:

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Board Source: <https://boardsource.org/fundamental-topics-of-nonprofit-board-service/strategic-planning/>

Council of Nonprofits: <https://www.councilofnonprofits.org/tools-resources/strategic-planning-nonprofits>

Free Management Library <https://managementhelp.org/freenonprofittraining/strategic-planning.htm>

Maryland Nonprofits and the Excellence Institute: <https://www.marylandnonprofits.org/>

Excellence Institute

Maryland Nonprofit Development Center <https://www.marylandnonprofits.org/nonprofits-get-help/nonprofit-development-center/>

Stanford Social Innovation Review: <https://ssir.org/>

Washington Nonprofit Institute: <https://www.wanonprofitinstitute.org/planning/>



# Resources:

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## **Books:**

Change by Design by Tim Brown

Nonprofit Strategy Revolution by David La Piana with Melissa Mendes Campos (La Piana Consulting)

Strategic Planning Workbook for Nonprofit Organizations by Bryan W. Barry

## **General Strategy:**

Design Thinking and Strategy: Ideo U- [www.ideou.com/](http://www.ideou.com/)

Adaptive Planning: Spark Policy Institute- <http://tools.sparkpolicy.com/overview/>

Capacity Building: <https://www.councilofnonprofits.org/tools-resources/what-capacity-building>



# Let's Stay in Touch

We all need a team to help us and our organizations be successful.  
Let's start building our teams today!!

Before leaving this session exchange  
contact info with at least one other leader.



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