

THE LEADERSHIP GROUP

Strategic Planning White Paper

Strategic Planning Success

Successful nonprofits know that strategic planning is essential. Approximately every three years, these high-performing organizations evaluate their mission, values, environment, and strategies to ensure continued growth and delivery of its needed programs and services.

All too often, however, organizations begin the strategic planning process yet are quickly derailed, becoming bogged down with unproductive meetings, unclear objectives, incomplete information, or interpersonal dynamics. Others may go through the process, yet fail to incorporate the strategic goals into the governance or management of the organization, rendering it an exercise in futility.

The Leadership Group's Strategic Planning model guides organizations through this important process, making sure that time is used wisely, real progress is made, and essential issues and considerations are brought to the forefront for open discussion. The Leadership Group works with its clients to incorporate the information and new strategic goals into its governance and management to ensure success.

"Strategic planning sets the course for organizations and, when done correctly, re-energizes and motivates the board and the leadership team," explains Regina Podhorin, President of The Leadership Group. "Sadly, I often hear board members and staff lamenting that they dread this process...that is, until they work with The Leadership Group. Our 8 step process is designed to keep all members engaged and involved and ends with action plans and tactical planning that provide a clear road map for everyone to see where the organization is headed and how to get there."

The Leadership Group's innovative 8 step strategic planning model includes the following:

Mission Review

The Leadership Group takes the board and leadership team through an exploration of several questions such as: What difference does the organization make? For whom? What is unique about the way this organization does its work? The answers to these questions provide the parameters for the organization's work, something that can become somewhat distorted or blurred over time.

Vision

While many organizations understand their mission, not all have a clear sense of vision. Vision statements should feel close to impossible and address a compelling social need.

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This is the organization's statement of when it can go out of business...what problem will be solved or ameliorated.

Values

This important part of the process identifies ethical limits placed on the organization for the long term. It provides guidelines as to what should always be true about the way the organization does its work as well as what should never be allowed to happen. These values are reflected in board policies and set the stage for creating strategies and tactics in line with organizational ethics and conduct.

SWOT Analysis

The Leadership Group facilitates internal brainstorming and/or assessment processes to identify strengths (S), weaknesses (W), opportunities (O), and threats (T) that can impact the organization's ability to achieve its mission. The information from this session is integral to the strategic planning process. This is where the future direction of the organization is shaped.

Environmental Scan

The Leadership Group collects information outside of the organization to gain additional insight into key trends/needs within the service community. This information is collected through literature research and individual/group interviews, focus groups or surveys. The environmental scan enhances and supplements the information collected in the SWOT analysis.

Tactical Planning

With all of the research and information gathering completed, The Leadership Group works with the board and the leadership team to develop an action plan to achieve the organization's newly-determined strategic goals. The timeframe for this initial tactical plan is 12-18 months and is revised annually. The action steps include measurable benchmarks of progress, assignment of responsibility, and estimates of resource needs (funding, personnel, expertise). The organization's staff prepares a tactical plan for each program/management goal; the board prepares a tactical plan for governance goals.

Setting a Strategic Agenda

After setting strategic direction for the organization for the next 3 years, The Leadership Group assists the board in adapting its regular meeting agenda to include monitoring of progress, continued trend analysis, and committee tactical plan updates. The strategic plan should come alive in every board meeting and be a the center of board work and governance.

Plan Roll-Out

The roll out of the plan occurs after the strategic plan is approved by the board and tactical plans are implemented. Interim changes in direction can be made if continued trend analysis indicates a new compelling priority. New strategic initiatives require the board to

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identify which of the former initiatives should be replaced or altered to make room/energy for new/additional initiatives. The third year of any planning cycle begins an entire new process starting with mission review.

The Leadership Group's consulting team is ready to assist your organization as it begins this essential task. Working with The Leadership Group allows the board and the leadership team to focus on developing a 3 year strategic plan while we guide you through the process and ensure that time is used effectively, participants are engaged, facilitate solid and difficult decision making based on research and key information, and create a follow-up system that positions you for success.

To discuss how The Leadership Group can help, contact us as 609.392.4872 or regina@leadershipgroup.info.

The Leadership Group's Difference

With over 15 years in the nonprofit consulting arena, The Leadership Group is uniquely positioned to provide and enhance strategic planning, strategic governance, and strategic leadership of nonprofit organizations. Our consulting services are provided by people who have years of experience in the nonprofit sector. We know what it takes to meet the everyday demands of funders and clients while also looking towards the future - maximizing opportunities and addressing challenges.

Regina Podhorin, founder and president, is a thought leader in the nonprofit field and is a sought after speaker. To learn more about The Leadership Group, visit www.leadershipgroup.info.

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