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# **The Process of Strategic Planning For Non-Profit Organizations**

# Preface

The need for a Strategic and Business Plan for non-profit organizations is, today, **more critical than ever before**. While many of the same business processes and disciplines can and should apply, the world of the non-profit organization is separate and distinct; and therefore, requires a far more customized approach .... with similar structure.

PerformanceStream has taken its many years of business acumen along with the expertise of its affiliates and employees, in the non-profit arena, to design and develop **a customized approach to Strategic and Business Planning for the non-profit organization.**

This presentation is designed to provide an overview of this process

It is designed to:

- Answer **the growing need of developing a structured plan** for a non-profit organization, while retaining the distinctive aspects of this non-business entity
- Develop a short and long term **model of success** for the organization
- Allow for **“total inclusion”** within the developmental stages
- Demonstrate to the various constituents of the organization the **strength and forward-thinking structure of the non-profit organization.**



# Strategic and Business Planning Process

Strategic and Business Planning is a process that will:

- specify the desired **future of the organization** through a basic foundation of values, principles and vision
- set and **define the parameters of success** through a well-defined and focused mission statement
- state the **critical success factors to be achieved**
- create and **“bring-to-life” the fundraising, administrative and budgetary plans** required for both short and long term success



# Strategic and Business Planning

## ■ Strategic Planning

- Philosophy
- Values & Principles
- Vision
- External Assessment
  - Fundraising segments
  - The non-profit landscape
  - Charitable Dollar Trend Analysis
- Internal Assessment
  - Best Practices
  - Organization Structure
  - Strengths and Limitations

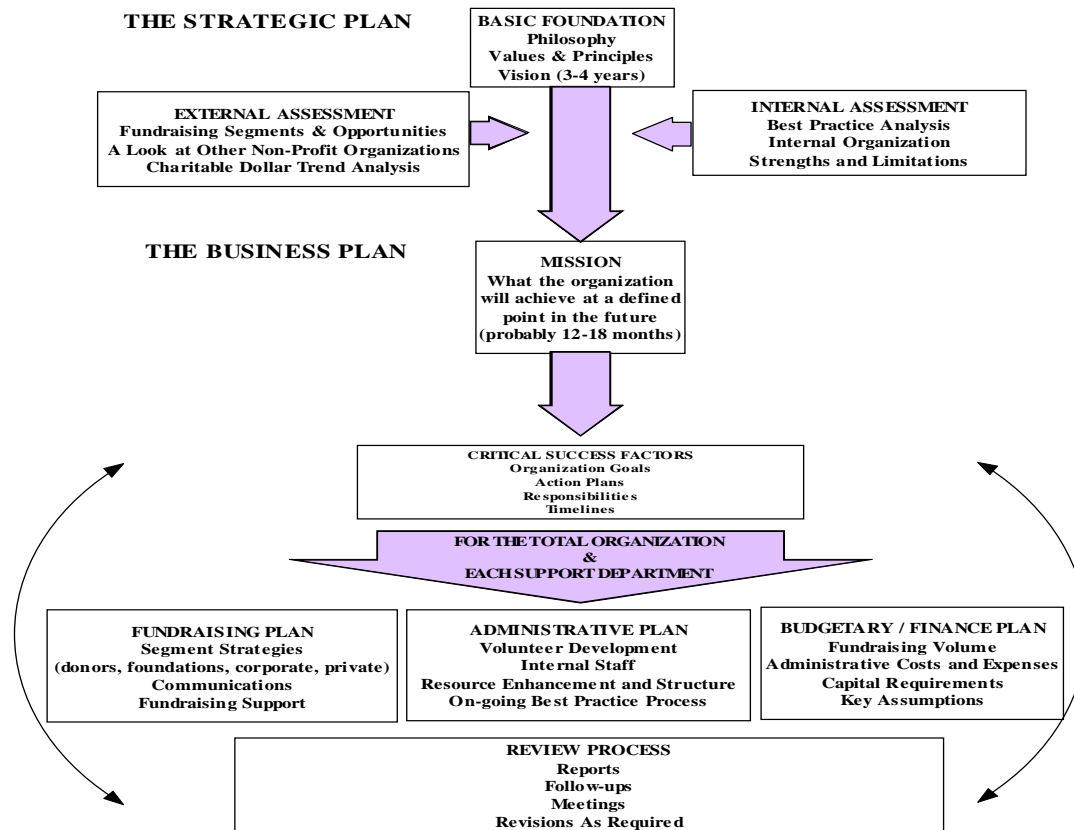
## ■ Business Planning

- Mission of the Organization
- Critical Success Factors
  - Organization Goals
  - Action Plans
  - Responsibilities
  - Timelines
- Support Department Plans
  - Fundraising Plan
  - Administrative Plan
  - Budgetary / Finance Plan
- Review Process



# Overview of the Process

## STRATEGIC AND BUSINESS PLANNING PROCESS FOR NON-PROFIT ORGANIZATIONS



# A Plan That Touches Many Constituents

- **Donors**
  - Foundations
  - Corporate
  - Private
- **Volunteers**
  - Board members
  - Internal Staff
  - Event Fundraisers
- **Community**



# Basic Foundation

- **Review of the existing statements** of purpose as historically defined by the organization...ensuring that they still pertains to the needs and desires of the organization
- **Refine**, as needed, the philosophy, values and principles of the organization
- Craft, as needed, **a vision statement of what the organization will look like over the next 3 - 4 years** ... defining
  - the Organization, and
  - clearly stating what the Organization wants to become



# External Assessment

- The fundraising segments of the population to be approached
- Potential opportunities within the segments
- A look at other non-profit organizations
- Analyzing the trends in charitable contributions



# Internal Assessment

- Is the non-profit utilizing the **best practices** available?
- What is the **internal organization structure**, and is it the most effective for the short and long term success of the non-profit?
- What are the **strengths and limitations** of the organization?



# Mission

- A statement that describes **how the vision will be achieved** during a specific and defined time frame (usually 12-18 months)
  - **Review existing mission statement** if one exists
  - Ensure that the mission statement **continues to pertain to the desires of the organization**
  - Provide **a level of flexibility** for the mission statement for use in the long term



# Critical Goal Categories

**What must happen** for our mission to be achieved?

- Organization **goals**
  - **Action Plans**
  - Responsibilities
    - Timelines



# Planning Goals

- Goals should be established to be:
  - S**pecific
  - M**easurable
  - A**ttainable
  - R**ealistically high
  - T**arget Date



# Ten Step Goal Document

The form is titled "Ten Step Goal Document" and is divided into three main sections. The top section contains steps 1 through 10. The middle section contains steps 4 and 5. The bottom section contains steps 6 through 10. Arrows indicate a flow from step 4 to 5, 5 to 6, and 6 to 7.

**Step 1:** GOAL

**Step 2:** REWARDS

**Step 3:** CONSEQUENCES

**Step 4:** POSSIBLE OBSTACLE

**Step 5:** POSSIBLE SOLUTIONS

**Step 6:** ACTION STEPS

**Step 7:** DATE

**Step 8:** DELEGATED TO

**Step 9:** TARGET DATE

**Step 10:** TODAY'S DATE

**Step 10 (continued):** AFFIRMATIONS

# The Fundraising Plan

- Segment Strategies
  - Donors
  - Foundations
  - Corporate
  - Private
  - Others
- Communications
- Fundraising Support



# The Administrative Plan

- Volunteer **Development**
- Internal Staff **Training**
- **Resource** Enhancement and Structure
- On-going **“best practice”** process



# The Budgetary / Finance Plan

- **Fundraising** Volume
- **Administrative costs and expenses** over the course of the planning period
- **Capital** requirements
- **Key assumptions** to be made during the planning period



# Review Process

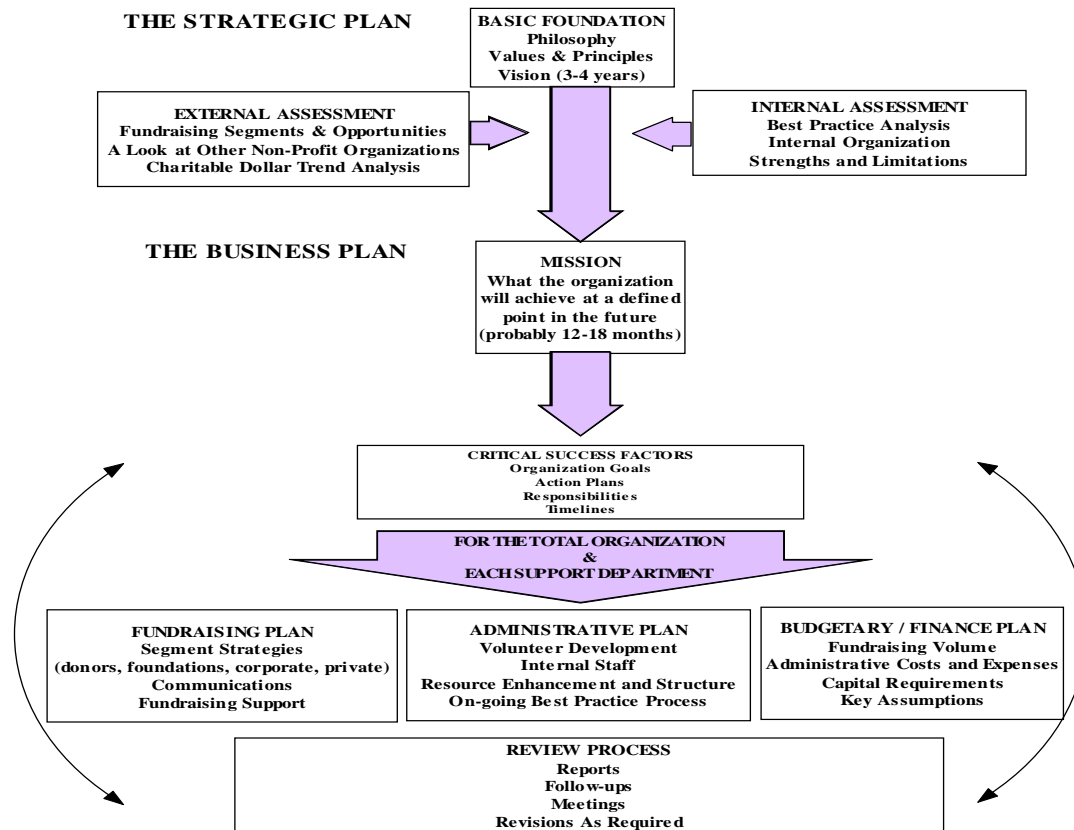
- Reports
- Follow-ups
- Meetings

REVISIONS IN 30, 60  
AND 90 DAY TIME  
PERIODS



# Overview of the Process

## STRATEGIC AND BUSINESS PLANNING PROCESS FOR NON-PROFIT ORGANIZATIONS



# Implementation of the Plan

The successful implementation of a strategic and business plan is the function of the behavior of an organization's Board and/or their CEO. PerformanceStream consultants work closely with the organization to fully comprehend and understand the needs of the organization and ensure that the development of a plan meets the needs of both the long term and the short timetables.

PerformanceStream works with these individuals to develop the plan and ensures that the review process is an all-inclusive one for as many members as required within the organization.

Normally, the basic structure of the plan takes 20 hours to create....with approximately 8 hours of discovery work (understanding the current state of the organization) just prior. Once this is completed, the Review Process, which incorporates the status of the achievement of each goal is reviewed and revised, as needed, in 30, 60, 90 day and quarterly time periods.



# Implementation Timetable

- Discovery 8 hours
- Facilitated Plan Development 20 hours
- Final Plan Structuring 4 hours
- Follow-up Sessions (30, 60, 90 day time periods) 12 hours



# Summary

- The end product is a **“blueprint” of success** for the non-profit organization
- PerformanceStream **combines the strategic planning disciplines of a business with the understanding of non-profits**
- The process is one that **conserves time** by applying and using the organization’s knowledge and understanding
- PerformanceStream are not **the experts** in your organization. **You are.** We are the experts that help your organization achieve desired results.



# Contact Information

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