



Center for
Nonprofit
Management

Raymond Diaz - Strategist

Defining Your Strategic Plan

September 20, 2023

Introduce Yourself

- Name
- Organization
- What is your strategic planning experience? OR
- When you hear “strategic plan”, what does it invoke in you?

Agenda

Welcome and Introduction

What is a Strategic Plan?

The Strategic Planning Process

Preparing for a Strategic Plan

Revisiting Mission, Vision, and Values

Wrap Up and Next Steps



SESSION PRESENTER

Raymond Diaz

Strategist

he/him/his

Center for Nonprofit Management

Let's Connect on LinkedIn



Center for Nonprofit Management (CNM) Overview

- Nonprofit skill building through collaboration, education, training, and technical assistance.
- Consultation expertise in solution-focused strategic planning and evaluation.
- Advocacy for the nonprofit sector through capacity-building expertise and strategic partnerships with governmental, philanthropic, and other stakeholders.

Ground Rules

Be present

Participate –
interaction

Step up/back

Listen without
judgement

Confidentiality –
share the
message not the
person

Talk from your
experience

Be open to new
ideas

Learn from each
other

Be respectful
with electronics

What is a Strategic Plan?

Why Plan?



What is Strategy?

What is Strategy?

- Strategy is a general plan to achieve one or more goals under conditions of uncertainty.

What is Organizational Strategy?

- Specifies how an organization will allocate resources (funds, labor, inventory) to support goals, infrastructure, marketing, etc.

What is a Strategic Decision?

- Strategic decisions are decisions that incorporate many factors such as:
 - The environment in which the organization operates
 - Organizational resources
 - Staff
 - The relationship between staff and resources

What is Strategic Planning?



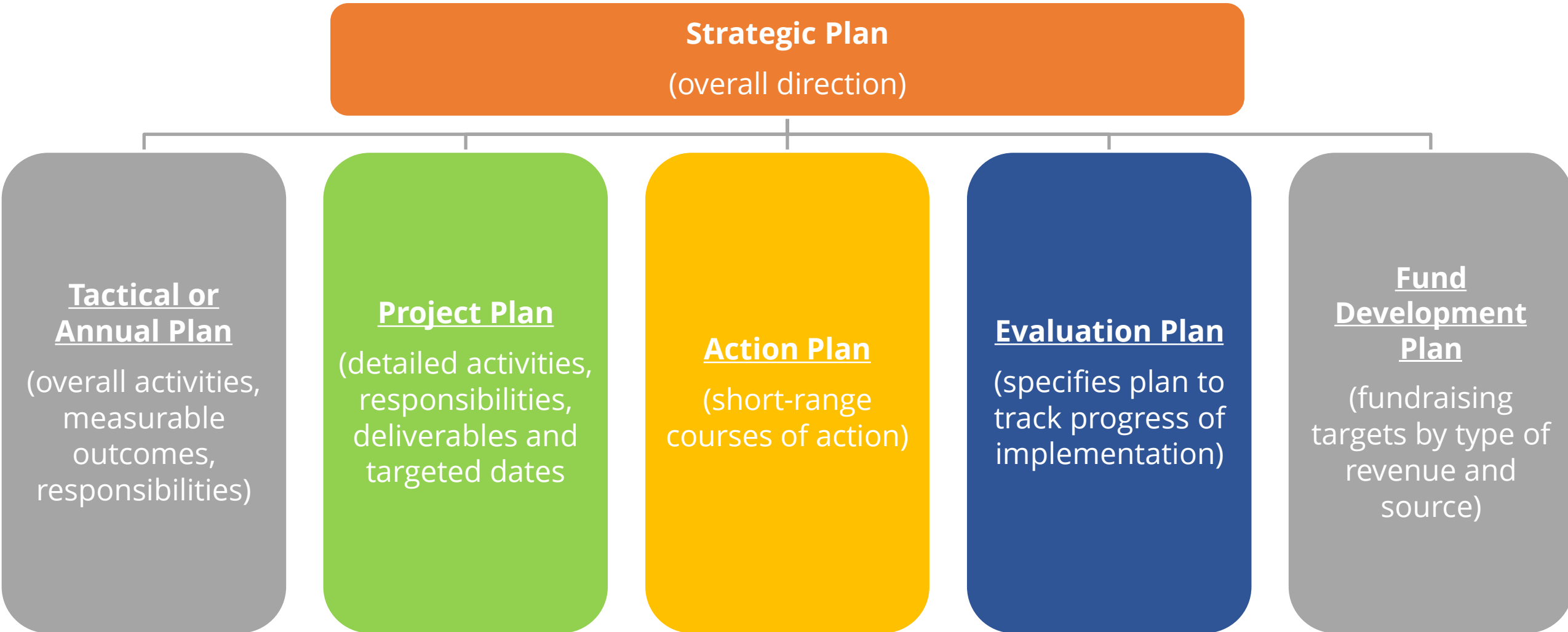
Strategic **PLANNING** is a **PROCESS**



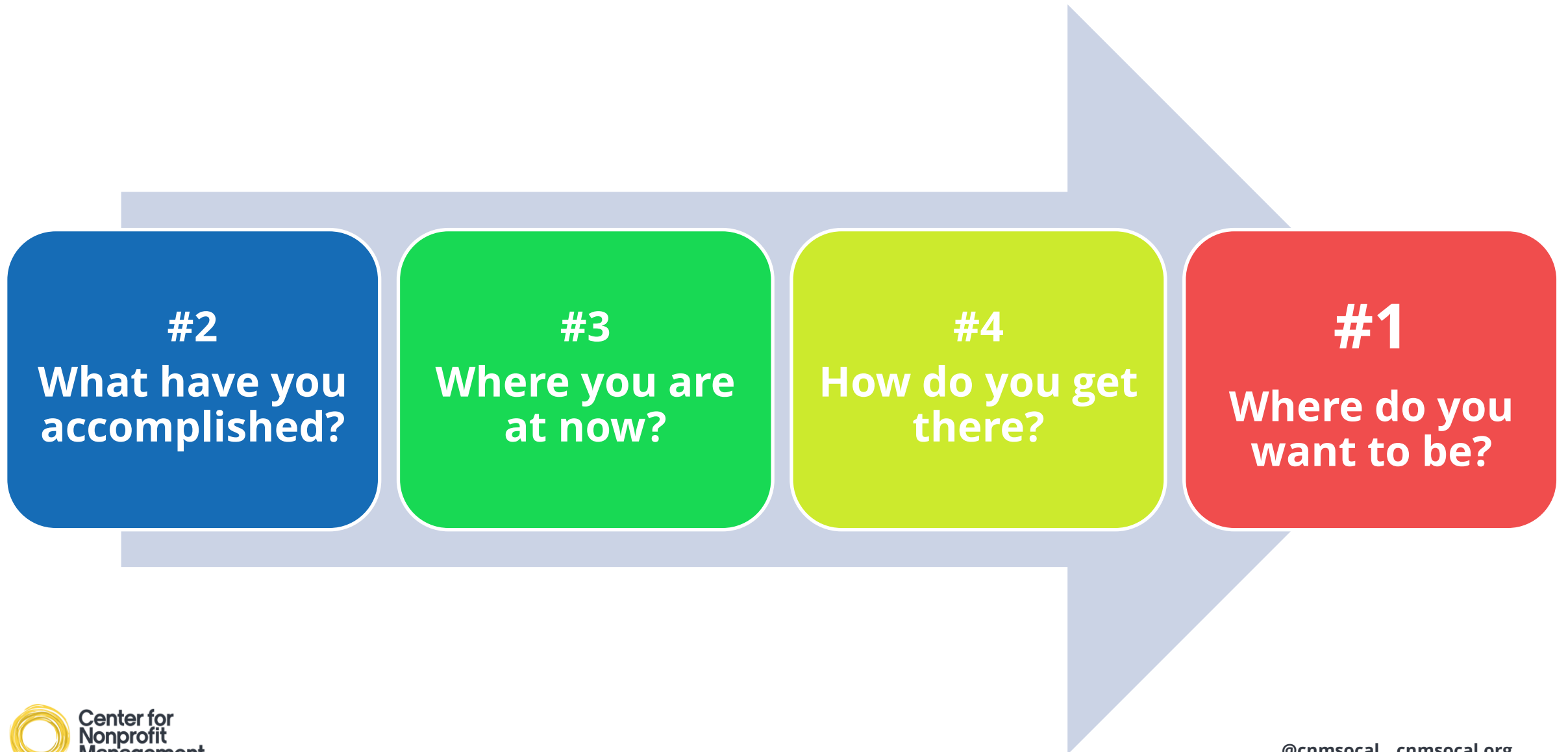




Types of Plans



What is the path?



Typical Strategic Plan

**Executive
Summary**

**Planning
Methodology &
Acknowledge
Participants**

**Mission and
Vision**

Current Situation

- Internal
- External

**Major Priority
Areas**

- Goals
- Objectives

**Action Plan – Tasks
& Timeline**

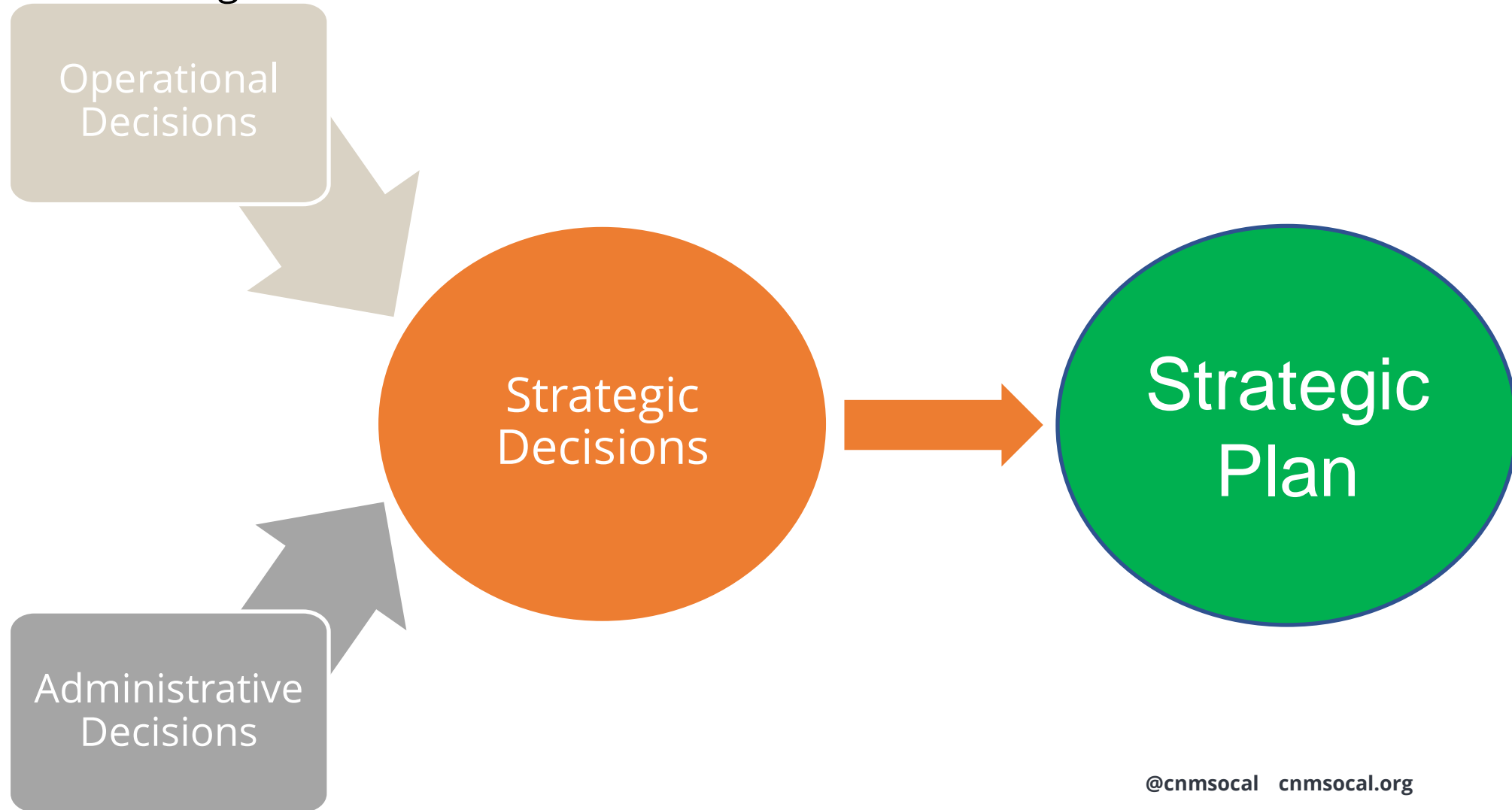
**Budget – Multi-
year**

**Revenue Plan –
Multi-year**

**Evaluation
throughout**

What makes the plan strategic?

Strategic Plans are living documents with the flexibility to plan for uncertainty taking in account the 3 primary decisions an organization makes



Determining Readiness

Key Questions

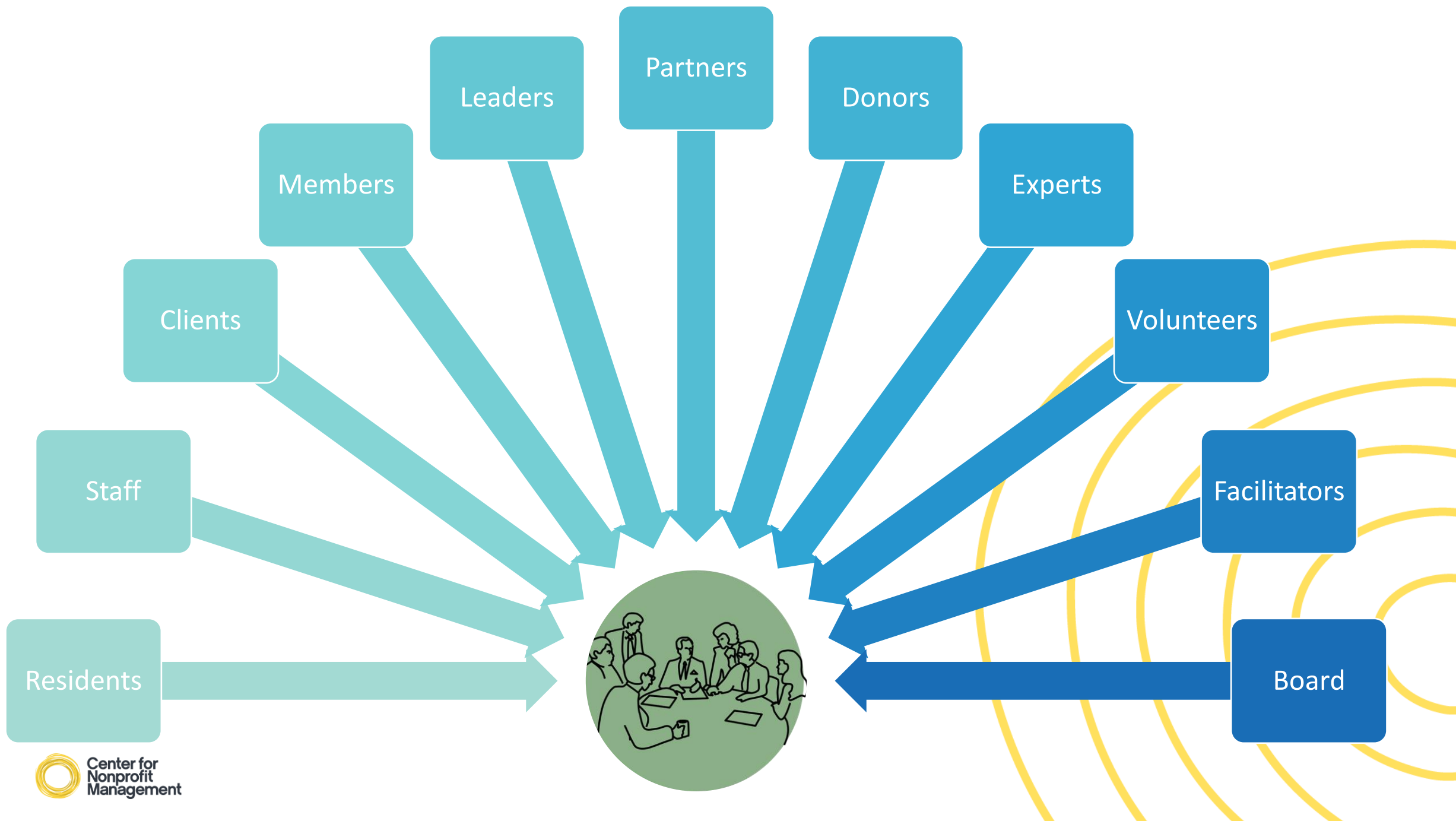
Why Now?
(Why are you
engaging in Strategic
Planning now?)

What does success
like?

Planning Period?
(1-, 3-, 5-years)

Resources?
(Costs, staff time,
tech, consultant,
research/data)

What information is
needed to guide your
planning?



Defining Terms

Mission	What do you want to make happen? What is the impact?
Values	What are your beliefs?
Vision	What is the change that will take place in the future?

Defining Terms

Goals	Change you want to see happen
Objectives	Short to long-term quantification of key goals
Tactics/ Initiatives	An action to be taken to implement goals
Measures/ Targets	Measures of performance

Revisiting Mission, Vision, Values

Determining where you want to go and where you are now



Mission Statement Re-Visited

Is it still relevant?

Does it reflect the direction of the organization?

What is missing?

What do you question?

Should the mission statement be updated?

Vision

Greater Vision
10 Year Vision



3-5 Year Vision



Values

What do you believe?

A wide-angle photograph of a lush green rice field. The foreground is filled with dense, vibrant green rice stalks. In the distance, a flat horizon line separates the field from a sky with soft, warm light from a setting or rising sun. The sky is a mix of pale yellow, orange, and light blue, with a few wispy clouds. The overall mood is peaceful and natural.

Environmental Scan

Assessing The Environment

Information
Gathering

Organizational
Assessment

Internal
Assessment

- *SWOT Analysis*

External
Assessment

- *Environmental Scan*

Situational
Analysis

Critical Issues

Strategic Planning

Developing Priorities and Goals

Creating Objectives

Identifying Key Action Steps

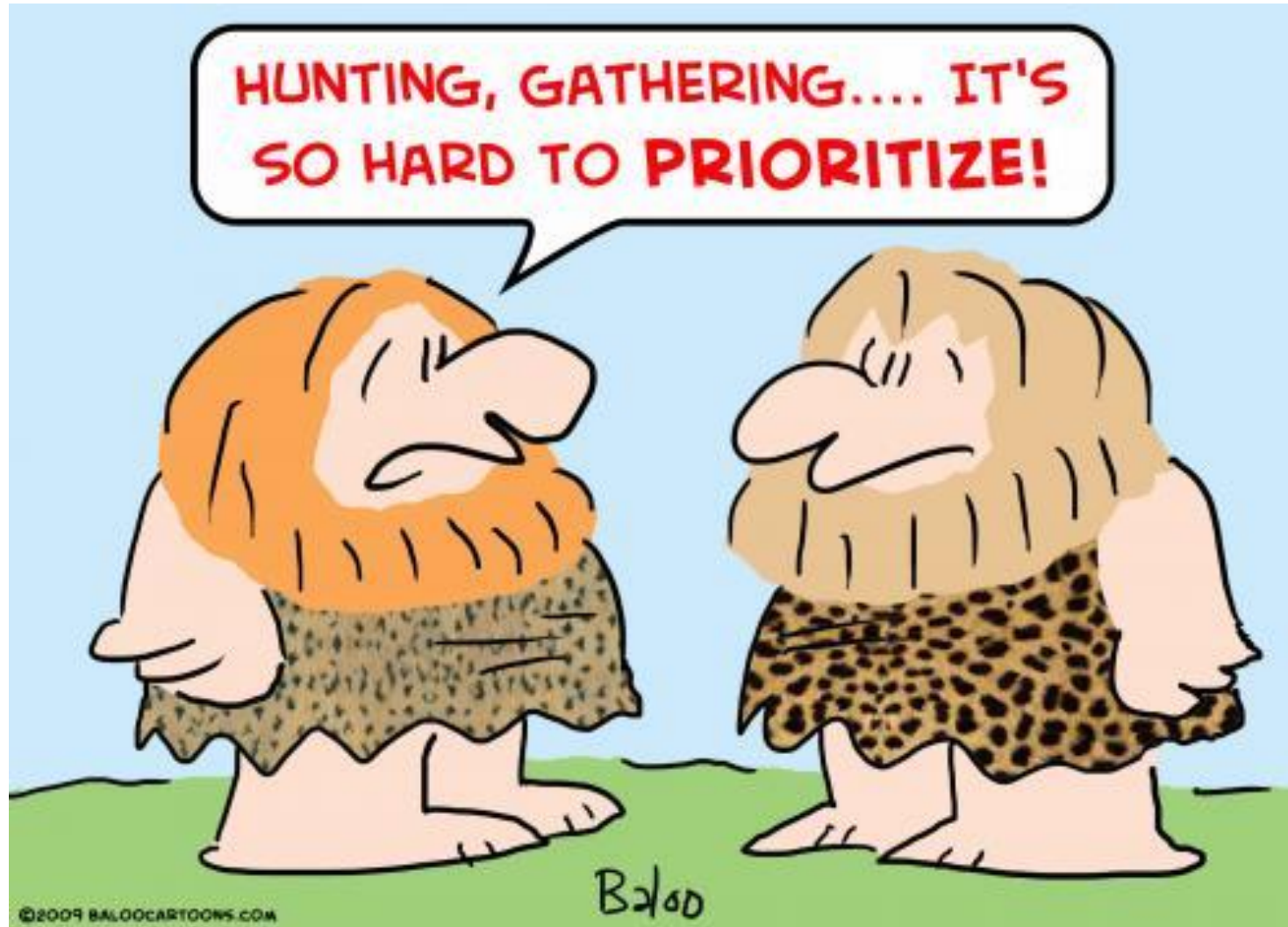
SWOT Analysis Format

Helpful	Harmful
Strengths (internal) <p><i>What makes us unique?</i> <i>What can we build on?</i> <i>What can we leverage to seize opportunities?</i></p>	Weaknesses/Challenges (internal) <p><i>What things do employees see as internal weaknesses?</i> <i>What do others see as our weaknesses?</i> <i>What are areas for improvements?</i> <i>What are potential solutions to mitigate, circumvent, or address weaknesses?</i></p>
Opportunities (internal & external) <p><i>What are areas for growth?</i> <i>What are areas for improvement?</i> <i>What are our stakeholders asking for?</i></p>	Threats/Obstacles (internal & external) <p><i>What are threats posed internally?</i> <i>What are external threats?</i> <i>What can we do to react, overcome, or circumvent threats?</i></p>

SOAR Analysis Format

<p>Strengths (internal)</p> <p><i>What makes us unique?</i> <i>What can we build on?</i> <i>What can we leverage to seize opportunities?</i></p>	<p>Opportunities (internal & external)</p> <p><i>What are areas for growth?</i> <i>What are areas for improvement?</i> <i>What are our stakeholders asking for?</i></p>
<p>Aspirations (internal)</p> <p><i>What do we care deeply about?</i> <i>What initiatives or processes will bring us closer to success?</i></p>	<p>Results (internal)</p> <p><i>How do we know we are succeeding?</i> <i>What are our measures of success?</i></p>

Setting Priorities



Wrap Up & Reflections

What stuck with
you today?

What is one thing
you're going to
take back to your
organization?

UPCOMING CNM TRAINING & EVENTS



October 19

Emerge as a renewed and strengthened leader with the tools and skills to kick off a season of wellness.



November 1

Explore the essential value of strategic planning.



November 8

How to effectively deliver your key messages.

Learn more and Register at cnmsocal.org/events

THANK
you



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