



STRATEGIC PLANNING OVERVIEW FOR VILLAGES



WAVE **Washington Area** **Villages Exchange**

Presented by Michael Feinstein, Vice President
michael@capacitypartners.com

January 24, 2022

Goals for Today

- 1. Why you should think about strategic planning.**
- 2. What Strategic Planning is and is not**
- 3. Conditions for Strategic Planning**
- 4. Framework and Tools**

Why Strategic Planning?

Strategic Plan

"If you don't know where you are going, it doesn't matter which way you go."

Cheshire Cat in *Alice in Wonderland*,
Lewis Carroll



Why Strategic Planning?

Strategic Planning will help you to:

- 1. Create the future you want for your Village*
- 2. Make better decisions about how you will secure and allocate resources to achieve your priorities*
- 3. Rally your stakeholders to support your Village*
- 4. Fulfill your board responsibilities to ensure effective planning and monitor and strengthen your programs*

Strategic Thinking Informs Strategic Planning

Strategic Thinking...

- *Is the foundation of strategic decision making.*
- *Incorporates mission, vision, values and strategy.*
- *Is an ongoing process of scanning and responding to your environment, assessing your results and incorporating your learning in order to better fulfill your mission.*

Strategy

The essence of strategy is CHOICE about...

...what to offer and how to succeed.

...addressing alternatives and uncertainty.

...what not to do.

Planning

“Vision without action is merely a dream. Action without vision just passes the time. Vision with action can change the world.”

– Joel Arthur Barker, American Futurist

“A goal without a plan is just a wish.”

– Antoine de Saint-Exupéry, French Author

Strategic Planning

IS NOT:

A prediction of the future.

Worthwhile unless there is first a strategic vision.

A substitute for ongoing judgment of leadership.

IS A PROCESS TO:

Help you accomplish your Village's goals given an uncertain future.

Help you decide on your vision for the future of your Village.

Help you set priorities and make clear decisions.

Deciding when to plan

Important Considerations:

- *Time and resources available*
- *The organization is relatively stable*
- *Board commitment to planning*

Capacity Partners® Framework for Strategic Planning

01 FOUNDATION

MISSION VISION VALUES

Why do we exist? What is our purpose?
What long-term impact do we seek to achieve?
What core beliefs underlie our work?

02 CURRENT SITUATION

EXTERNAL ANALYSIS INTERNAL ANALYSIS

What environmental trends affect us and how?
What opportunities and threats do we face?
What are our stakeholders' needs and how are we meeting them?
What are our organizational strengths?
What areas need improvement?

03 STRATEGIC DIRECTION

STRATEGIC PLAN GOALS STRATEGIES TIMEFRAME

Where are we going in the next 3-5 years?
What are our top 4-7 priorities?
How will we achieve these goals?
When do we plan to execute these strategies?

04 IMPLEMENT- ATION PLAN

ANNUAL OBJECTIVES ACTION PLAN OUTCOMES

What specific, measureable components of the goals and strategies will we achieve this year?
What tactics and activities need to be undertaken, by whom, etc.?
How will we define and measure success?

Strategic Planning Framework: Foundation

01 FOUNDATION

MISSION

VISION

VALUES

Why do we exist? What is our purpose?

What long-term impact do we seek to achieve?

What core beliefs underlie our work?

- Who are your customers?
- What programs do you offer?
- What is your unique value that makes you different and successful?
- How will you fund your Village?

Foundation Business Model



HOW WILL YOU BE
FINANCIALLY SUSTAINABLE?



REVENUE STREAMS

Strategic Planning Framework: Current Situation

02 CURRENT SITUATION

EXTERNAL ANALYSIS

What environmental trends affect us and how?
What opportunities and threats do we face?
What are our stakeholders' needs and how are we meeting them?

INTERNAL ANALYSIS

What are our organizational strengths?
What areas need improvement?

Current Situation SWOT Analysis

	EXTERNAL OPPORTUNITIES	EXTERNAL THREATS
INTERNAL STRENGTHS	<p>Opportunities and strengths are aligned.</p> <p>Potential to expand?</p>	<p>Threats and strengths are aligned.</p> <p>Mobilizing resources or create a strategic partnership?</p>
INTERNAL WEAKNESSES	<p>Opportunities and weaknesses are aligned.</p> <p>Invest to develop strengths or seek a strategic partnership?</p>	<p>Threats and weaknesses are aligned.</p> <p>Something to stop?</p>

Strategic Planning Framework: Strategic Direction

03 STRATEGIC DIRECTION

STRATEGIC PLAN
GOALS
STRATEGIES
TIMEFRAME

Where are we going in the next 3-5 years?
What are our top 4-7 priorities?
How will we achieve these goals?
When do we plan to execute these strategies?

Strategic Planning Framework: Implementation

04 IMPLEMENT- ATION PLAN

ANNUAL OBJECTIVES

What specific, measureable components of the goals and strategies will we achieve this year?

ACTION PLAN

What tactics and activities need to be undertaken, by whom, etc.?

OUTCOMES

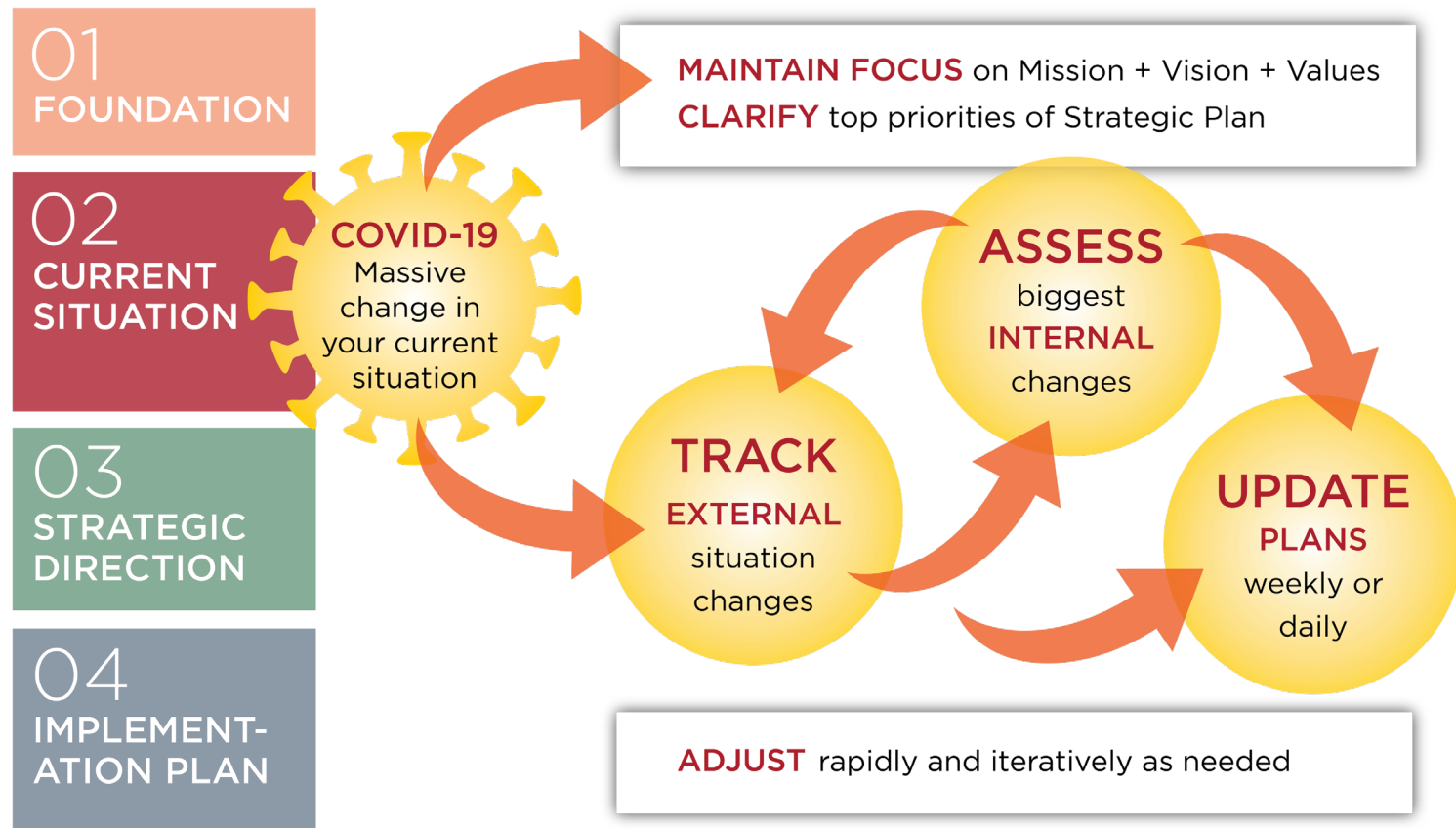
How will we define and measure success?

Implementation Operating Plan

STRATEGIC PLAN GOAL 1				
Objective 1				
Budget				
Proposed Tactic/Activity	Key Result	Responsible	Due By	Q1 Status
Activity 1				
Activity 2				
Activity 3				
Objective 2				
Budget				
Proposed Tactic/Activity	Key Result	Responsible	Due By	Q1 Status
Activity 1				
Activity 2				
Activity 3				
Objective 3				
Budget				
Proposed Tactic/Activity	Key Result	Responsible	Due By	Q1 Status
Activity 1				
Activity 2				
Activity 3				

Planning in a Time of Constant Change

Dynamic Planning



Capacity Partners® Framework for Dynamic Planning

Resources

- Board Source:
 - *Driving Strategic Planning*, Susan A. Waechter
 - *Shaping The Future of Your Organization*, A Strategic Planning Guide for Nonprofit Leaders
- *The Nonprofit Strategy Revolution*, David La Piana
- *Strategic Planning for Nonprofit Organizations*, Michael Allison, Jude Kaye