

WAVE Strategic Planning for Beginners

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Nonprofit management theory and study started in the 1950s but blossomed in the late 1970-80s. One key concept promoted is for a nonprofit to have a strategic plan. This planning process was typically initiated after the nonprofit had started and run services for some time and was in a point of flex. However, a formal strategic planning process is time and labor intensive - typically with a consultant guiding the process with data collection, interviews and meeting with stakeholders (clients, staff, leadership, community, officials, etc.) A SWOT analysis explores the organization's Strengths, Weaknesses, Opportunities and Threats. The guiding direction would then be hashed out by the board/leadership and become a document for reference and guidance. Planning and looking ahead is clearly important for any organization. However, finding funds to do a strategic planning process is difficult and not something most small villages can take on. If this is your situation, do not despair or feel this is a huge failing on your part. Many have attempted strategic planning processes and found the process didn't work for them. Done poorly without understanding concepts, many nonprofits and leaders focused on the planning process with a resulting static document that became irrelevant almost as soon as it was produced.

Strategic planning theory adapted over time to realities of implementation. By the 2000's, key strategic planning theorists and consultants realized that long-term 10-5 year plans became obsolete, and that the world was in constant flux. The key is to clarify mission and values from which to be a touchstone and look out to shorter time frames. They theorists realized strategic planning must be an *iterative process*. The model now tries to imbed strategic visioning into the leadership mindset. Leadership must continually scan the future and adapt quickly when needed. Leadership does not become stagnant holding a document as a blueprint set in stone but continually thinks outward and inward, assessing and reassessing.

So remember, strategic planning is something to strive for when the village is at a crossroads, but it is not imperative that you embark on a strategic planning process right now if you do not have the time or resources. What you can do is work to incorporate scanning the environment and strategic thinking into your leadership culture.

WHAT CAN YOU DO NOW?

In working with nonprofits over the decades, my thinking is that we need to imbed strategic thinking and processes at the organization's inception. Careful research and deliberation earlier on will help delay the need for an expensive strategic planning process later. This

thoughtful approach will also help develop a board and leadership where strategic thinking is part of the culture.

I recommend anyone starting a village, or in the early stages of running a village, to do deep dive to clarify:

1. Who are you intending to serve? Do a needs analysis...to look at the data which is easily found on our local government websites for free, and to explore demographics, socio-economic factors and other indicators to assess the real demand for a program.
 - a. How to do plan to serve them? What types of programming – rides, home visits, educational and social events? I have seen many wonderful mission-oriented folks over the decades start a nonprofit or initiative with good intentions where the program was not thoroughly researched and conceptualized. A poorly designed program that does not meet the community's needs will struggle and fail.
 - b. Talk with your peers - other villages and villagers. Learn what where the successes and pitfalls are by talking with others who are further along in the process. What are their recommendations and feedback, what programs, strategies worked and didn't work? Meet with villages of similar demographic background as your own to identify what is more likely to be replicable. Variations in geography and socio-economics will impact how and what works for that individual village.
 - c. Explore who is a "competitor" or doing similar work in the community. Would you be redundant or would they be interested in expansion and collaboration? Tying in programs into an existing entity is typically much simpler and less expensive than creating a new one. It allows for economies of scale while using that group's pre-existing recognition and experience in the community.
2. Be realistic about human resource needs.
 - a. If you plan to depend upon volunteers, then ask other villages how they have been able to recruit volunteers with specific skillsets. A village website requires trained individuals to maintain them. Communications now require someone to write and send emails, and to regularly clean and update the email lists. Newsletters require someone adept at working on a specific software and then posting them on your email listserv. Additionally, running a volunteer program requires a core of dedicated, reliable folks to run the volunteer vetting process, training and program maintenance...in addition to the daily collecting and coordinating ride or assistance requests.
3. How will you fund the village?
 - a. Explore and develop a realistic preliminary budget estimating costs for your village. This is where talking with other villages will be helpful to understand the

basic expenses and the mix of membership fees, donations, and feasibility of grant funding and processes.

- b. Then be realistic about growing financial needs. Although you may plan to use volunteers only, remember, it costs money to run the smallest organization. One needs a hosted website as a central marketing and information tool. Even with an all-volunteer organization, there are regular expenses for phones, website hosting, promotional materials, insurance, volunteer management, etc. Additionally, with technological demands, nonprofit management has become more complex and continues to become more so each couple years with add on costs. As the village grows, you will likely need an accountant for tax returns, or at some point need a lawyer for consultation or document preparation. This is where your village colleagues can help guide you on what and when to expect expenditures and to visualize future realistic budgeting and for tips on what is essential.

The hard work thinking and working with your board on these issues as you conceptualize and formalize your village will provide a strategic map - a general direction - and plan that can be adjusted. This intensive work and visioning and pre-planning will be time and effort well invested.

LOCAL RESOURCES FOR HELP

WAVE – Washington Area Villages Exchange. We are a team of dedicated volunteers who work within the DMV village community. Please reach out to us for mentoring and for information.
<https://www.wavevillages.org/>

Montgomery County Village Coordinator –
<https://www.montgomerycountymd.gov/HHSPProgram/ADS/Villages/resources.html>

Fairfax County Village Coordinator - <https://www.fairfaxcounty.gov/health/neighbor>

DC Office on Aging has an excellent guide on how to start a village and steps:
[Village How To Guide 092715.pdf \(dc.gov\)](#)

STRATEGIC PLANNING LITERATURE AND SOME RESOURCES

Some key strategic planning thinkers, practitioners and workbooks

Henry Mintzberg, **Rise and Fall of Strategic Planning** (2013). One of the early leaders in strategic planning and former president of the Strategic Management Society. Overviews strategic planning pitfalls and problems – reassesses the approach and clarifies that strategy cannot be planned. There is a role for planning and processes but there also must be a focus on strategic thinking.

John M. Bryson, **Strategic Planning for Public and Nonprofit Organizations**, 5th Edition (2018). Bryson is one of the leading and respected academics and researchers in the arena of strategic planning. His works are considered classics.



Figure 1.1. The ABCs of Strategic Planning.
Source: Bryson and Alston, 2011.

<i>Where you are -----></i>	<i>Where you want to be -----></i>	<i>How to get there</i>
Mission	Mission	Strategic Plan
Structure/Systems	Structure/Systems	IT and HR plans
Communications	Communications	Communications
Programs and Services	Programs and Services	Hiring and Training
People and Skills	People and Skills	Restructuring and Re-engineering
Budget/Support	Budget/Support	Budget allocations

“The important activities are *strategic thinking, acting and learning*, not strategic planning per se. Indeed, if any particular approach to strategic planning gets in the way of strategic thought, action, and learning, that planning approach should be scrapped.” (Bryson in Preface.)

David La Piana with Melissa Mendes Campos, **The Nonprofit Strategy Revolution**, 2nd Edition (2018). This nationally well-regarded consulting group with decades of experience in the field developed their reality-based Real-Time Strategic Planning (RTSP) approach which can work for small nonprofits. They revise the old model of nonprofit leadership being more than a planner, it requires the leaders to be strategists and a boundary-spanners.

“Strategy is a coordinated set of actions designed to sustain a competitive advantage in achieving a nonprofit’s mission.” Strategy – mission and how you will focus your efforts on fulfilling that mission for highest impact. Organizational strategy - determine mission, vision, trends, competitors, partners, market position. (p. 26)

- [Principles for Strategy Development - La Piana](#)
- [The Strategy Pyramid - La Piana](#)
- [Strategy Screen - La Piana](#)
- [The Seven Deadly Sins of Strategic Planning...And How to Avoid Them - YouTube](#)

Satterberg Foundation, **Strategic Planning in Nonprofits (SPiN): Your step-by-step guide to achieve your mission**, Washington Nonprofits (2018).

- [Microsoft Word - SPiN Workbook Workshop Final word.docx \(wanonprofitinstitute.org\)](#)
- Tool kit and videos [Strategic Planning in Nonprofits – The Washington Nonprofit Institute \(wanonprofitinstitute.org\)](#)

National Council of Nonprofits, [Business Planning for Nonprofits | National Council of Nonprofits](#). **What’s the difference between business planning and strategic planning?**

A business plan explains the “who/what/how/where/when” and typically will answer questions such as: “Who are the nonprofit’s “customers?” “What is the geographic area for the nonprofit’s services?” “What other nonprofits are providing similar services?” and “What services does our nonprofit deliver that are unique?” A business plan is the action plan, identifying the tasks, milestones, and goals, but also identifying the potential for success and the potential risks ahead, given the nonprofit’s “competitive advantages” and the environment in which it operates.

The strategic plan takes all that the business plan has identified and answers “*how*” the desired results will be achieved, such as, “How will we accomplish all this with limited resources? What will we prioritize? How will we achieve more ambitious revenue goals?” Other questions that a strategic plan might answer include: “What needs to happen so that we can achieve success?” and “How will we measure success?”