

Strategic Planning in Nonprofits (SPiN)

Your step-by-step guide to achieve your mission



**Nonprofit Association
of Washington**

Satterberg foundation



Strategic Planning in Nonprofits (SPiN) is a project of Nonprofit Association of Washington, our state association that makes sure nonprofits have what they need to succeed. SPiN was funded by the Satterberg Foundation. Together we seek to expand the capacity of nonprofits to achieve their mission. SPiN was designed to give you the knowledge and tools your organization needs to plan so that you can better achieve your mission.

These materials accompany videos and are supported by key tools and documents. Visit the Strategic Planning in Nonprofits webpage for more:

www.nonprofitwa.org/slug

Strategic Planning in Nonprofits is the third in a series of nonprofit learning resources. Some of the topics covered here connect with topics covered in these other resources:



Boards in Gear:
Unlocking the Why, What, Who, and How of Nonprofit Boards



Finance Unlocked for Nonprofits: Unlocking financial literacy for nonprofit board members to deliver mission and protect assets



Let's Go Legal: The right road to compliance and protection. Created in partnership with Wayfind.

All of these include videos, guides, games, documents, and tools. Available in the Learning Library:

nonprofitwa.org/learn/nonprofit-fundamentals

Laura Pierce of Laura Pierce Consulting led the content development of SPiN, and we greatly appreciate the contributions of by our team of advisors:

- Angela Powell, Principal, Imago
- Sarah Tran, Executive Director, Nonprofit Assistance Center
- Catharine Gately, Founder, The Narrative Company

For more information:

Nonprofit Association of Washington
learning@nonprofitwa.org
nonprofitwa.org
855-299-2922

Welcome to SPiN!

Strategic Planning can seem intimidating. You may imagine months of meetings to produce a report that sits on the shelf. But when done well, planning serves as a powerful and effective blueprint for the future of your organization. In reality, you are probably already planning — many small nonprofits operate strategically every single day. You just may not be disciplined in putting your plans on paper.

Before we get started, let's define Strategic Planning. **A “strategy” is a plan, method, or series of actions for obtaining a specific goal or result. In nonprofits, the right strategic alignment of people, funds, resources, and partnerships leads to success.**

According to the National Council of Nonprofits, **“A Strategic Planning Process identifies strategies so that a nonprofit will achieve its mission. Ideally as staff and board engage in the process, they become committed to measurable goals, approve priorities for implementation, and also commit to revisiting the organization’s strategies on an ongoing basis as the organization’s internal and external environments change.”**

A Strategic Plan has the power to:

- **Focus and align** board and staff members, creating better results and increased momentum. It opens a conversation that may not be otherwise happening.
- **Connect and unify** your stakeholders — those individuals or groups that have an interest in the organization, including those people who benefit from your mission.
- **Give you the words to use with your key audiences** (like funders and partners) to bring them more powerfully into your work.

Having a Strategic Plan is critical to driving your mission. You will discover that taking the time to reflect and have meaningful conversations about your strategic direction is powerful and inspirational, and may have other benefits such as inspiring others, engaging new leaders, improving your work, raising more funds, and deepening your relationships with community partners and those you serve. We look forward to working with you on the journey!

SPiN Format

The following guide is our core SPiN curriculum and covers each stage of the Strategic Planning process. In each section, we explain what your Strategic Planning Team needs to know and do, including:



Why is this stage of planning important?



What does your Strategic Planning Team need to know?



*How does your Strategic Planning Team show what they know?
What actions should you expect at this stage?*



*What will your Strategic Planning Team produce at this stage?
What are the tools your Strategic Planning Team can access and leverage to complete this stage?*



What are some ideas that work?

The SPiN Cycle

Strategic Planning is cyclical. You reflect, chart a course (plan), implement your goals, learn from the experience, *and then start all over again* — *each time making progress toward your vision and mission*. We recommend completing the cycle every three years. The graphic below illustrates the main stages of the Strategic Planning Cycle, and of our SPiN Toolkit.



Strategic Plan Components

The basic components of a strategic plan are mission, vision, strategic priorities and objectives. The mission, vision and strategic priorities form your organization’s strategic framework. This is a high-level “compass” to provide direction. The strategic framework is short and memorable (usually one page) and can be shared with the public. The framework is supported by a more detailed implementation plan that outlines how you expect to achieve the results outlined in the strategic framework, and includes specific and measurable objectives. SPiN will guide you through the development of each element.

Strategic Framework

| Element | Definition |
|----------------------|--|
| Mission | A statement of the organization’s purpose |
| Vision | A statement of what the world will be like when you have achieved your mission |
| Strategic Priorities | Major goals for the coming three years — the most important areas of focus for your organization during this planning period |
| Objectives | Specific steps to take to make progress toward each strategic priority. |



Some additional elements you might consider include values, an identity statement, and outcomes.

Building a Strategic Planning Team

Your board of directors has ultimate responsibility for strategic planning. In practice, planning is a shared responsibility of board and staff and can be enhanced by participation of clients and other community stakeholders. We recommend identifying a small team of leaders to guide the process and keep it moving. This group does not make all the decisions, but they can gather information and tee up board and staff discussions that form the basis for the plan. They can develop and edit the draft plan for board review. Your board should formally approve the final strategic plan. This core planning team typically includes several board and staff members and may include one or two other key stakeholders whom you feel can add value.

Depending on the culture of the organization, your planning process may be more staff-driven or board-driven, but the ideal is to engage both groups throughout the planning activities.

Ready to begin?

You'll need some tools along the way.
They're available on our website,
nonprofitwa.org/learn.

