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Beyond Strategic Planning *Imparting new life to your governance and executives*

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Everyone can use a chance to recharge their batteries every now and then. In today's nonprofit sector, the need to "recharge" organizations has never been greater. Though it has a powerful mission and does great work, the entire organization is often exhausted from all that needs to get accomplished with fewer and fewer resources.

The challenges in today's nonprofit sector are daunting at times and many wonder how they will survive, let alone succeed.

One of the traditional ways to "recharge" your organization is the strategic planning process. These types of engagements often begin with high hopes, but conclude in disappointment with little achieved and end up collecting dust on some executive's shelf. This disappointment is often the result of most strategic plans lacking the following four components:

- An upfront, comprehensive assessment of the organization;
- A clear vision with established measures of progress;
- A comprehensive funding plan to secure the necessary resources; and,
- A detailed plan for implementation and execution with buy-in from both board and staff.

Executives involved in strategic planning are asked to provide some feedback about what the process has done for them. You can expect the typical responses that the sessions "provided a clear path forward" or

"helped transform the organization" or "really engaged our board."

The reaction you want is that the process "helped revitalize our organization." Those who have undergone the process should have a greater sense of confidence to achieve their strategic goals and the knowhow to accomplish them. The entire board and staff should be energized and excited about who they are and where they are going.

Here's how the process works. Begin by first getting to know where the organization is and what internal obstacles might be hindering them. This is accomplished through a comprehensive organizational assessment conducted confidentially via face-to-face interviews with all key internal and external stakeholders.

A few interviewees might need to schedule a conference call but the preference is in-person. Conference calls are often required when national organizations are involved and board members are all across the country. It is important to review an extensive list of information about the organization prior to the interviews. This information includes board minutes, financial statements and budgets, management table of organization, annual marketing and public relations reports and fundraising accomplishments. The informational review and confidential interviews help get a better understanding of who they really are and not just who they say they are.

Only when this intensive "up front" work is completed can the work on the strategic

plan actually begin.

The next crucial phase is to facilitate a series of discussions about vision. What impact do they want to have on their communities going forward? What is the difference they want to make? This is often done at a board retreat or series of meetings with a steering committee. The vision should be a realistic, credible and attractive future for your organization and agreed upon by all key stakeholders. It must have measureable goals and should be your articulation of a destination toward which your organization should aim.

Your vision should inspire enthusiasm, encourage commitment, be well-articulated and easily understood. Above all, your vision should be ambitious.

Now that where you want to go is clearly established, a thorough review of all programs and services is undertaken to determine which need enhancements, development or elimination. It is important to establish a set of realistic priorities for enhanced or newly developed programs and services. When you set too many goals, often very few are actually achieved. This is an ideal time to explore other organizations for collaborations or affiliations to achieve the goals of each program. As a matter of fact, most funders want you to collaborate.

A plan to secure the necessary resources for each program or service being developed or enhanced is next. The board might need to be educated regarding how to effectively raise money and their specific role.

A complete set of board assessment tools

and governance plan must be provided as part of the strategic plan. A key for success is to help the organization “capacity build” so they can build the required infrastructure.

A crucial issue is how to effectively market the organization. The need to create social media strategies and email marketing campaigns are crucial.

Most nonprofit organizations have poor

websites, too. Make sure your website is attractive, interactive and has a video telling your inspirational story. Remember it is important to appeal to both the mind and the heart in your messaging.

There is an old saying, adapted for nonprofit executives that they “need to build the bicycle while they are riding it.” This means that change must begin on day one and not

wait until a final report is completed.

Only when a comprehensive assessment of the organization is conducted and an inspirational vision of the future is agreed upon can the strategic planning process commence. By going beyond the traditional strategic planning process, the board and staff can truly feel revitalized, imparting new life to their organization. **E**

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