

Strategic Planning

For
Nonprofit Organizations

Clark Crouch
Strategic Planning Consultant

Presentation Copyright 2001 by Clark Crouch, Richland, WA
clark@crouchnet.com -- <http://crouchnet.com/>



Tacoma, Washington
October 15-17, 2001

*If we could first know
where we are and
whither we are tending,
we could better judge
what to do and
how to do it.*

...Abraham Lincoln



**Tacoma, Washington
October 15-17, 2001**

Strategic Questions

- ❑ Why are we in business?
- ❑ How do we do business?
- ❑ Where are we now?
- ❑ Where do we want to be?
- ❑ How can we get there?
- ❑ How will we know we've arrived?



Tacoma, Washington
October 15-17, 2001

Key Elements

- ❑ **Vision**
- ❑ **Mission**
- ❑ **Environment**
- ❑ **Goals / Objectives**
- ❑ **Action Plans**



Tacoma, Washington
October 15-17, 2001

Vision

"...the future position and value of our organization..."

- ❑ the news medium of choice (newspaper)**
- ❑ success for every student (school)**
- ❑ assuring affordable homes (housing)**
- ❑ efficient, effective, economical (service)**



**Tacoma, Washington
October 15-17, 2001**

Mission

"...who we are, who we serve, what we offer,
how we operate..."

The City Housing Authority was established in 1979 to assure adequate, affordable housing for our citizens. A citizen board assesses need, assures resources, builds or purchases facilities, and manages their use.



Tacoma, Washington
October 15-17, 2001

Environment

- ❑ **Internal - Strengths and Challenges**
- ❑ **External - Opportunities and Threats**
- ❑ **Everywhere - Constraints and Competition**



Tacoma, Washington
October 15-17, 2001

Goals / Objectives

Defining our needs (strategies)...

Goals are smart:

S – specific

M – measurable

A – achievable

R – realistic

T - timely



Tacoma, Washington
October 15-17, 2001

Action Plans

Satisfying our needs (tactics)...

- ❑ What is the specific goal?
- ❑ Who will champion it's accomplishment?
- ❑ When will action start? End?
- ❑ What tasks are involved?
- ❑ What resources are needed?
- ❑ How shall we monitor?



Tacoma, Washington
October 15-17, 2001

Tasks

Accomplishing our goals...

- What is the specific task?
- Who will champion it's accomplishment?
- When will action start? End?
- What activities are involved?
- What resources are needed?
- How shall we monitor?



Tacoma, Washington
October 15-17, 2001

Resources

- ❑ **People**
- ❑ **Property**
- ❑ **Time**
- ❑ **Money**
- ❑ **Technology**



Tacoma, Washington
October 15-17, 2001

Planning Process

- ❑ Establish, affirm, or revise our vision
- ❑ Establish, affirm, or revise our mission
- ❑ Conduct an environmental scan
- ❑ Identify goals related to above items
- ❑ Develop action plans to accomplish goals
- ❑ Implement and lead action plans



Tacoma, Washington
October 15-17, 2001

Leadership is getting

- > the right people to do*
- > the right thing in*
- > the right way at*
- > the right time with*
- > the right use of resources*

...Clark Crouch



Tacoma, Washington
October 15-17, 2001

Goal Setting Process

- ❑ Consider: vision, mission, environment
- ❑ Generate goals
- ❑ Prioritize goals
- ❑ Determine how to defend selections

(Goals show "what" not "how.")



Tacoma, Washington
October 15-17, 2001

Team Process

- **Teams select three top goals by consensus**
 - **Combine,**
 - **Re-Write, or**
 - **Create new goals**
- **Report to the group, defend choices**
- **Begin Action Planning**



Tacoma, Washington
October 15-17, 2001

*The people who get on
in this world are the people
who get up and look for
the circumstances they
want, and, if they can't
find them, make them.*

...George Bernard Shaw



**Tacoma, Washington
October 15-17, 2001**

Results should be effective, efficient, and economical; that is: suitable for the intended purpose, capable of producing the desired results, and involving the least investment of resources.

...Clark Crouch



**Tacoma, Washington
October 15-17, 2001**

**As a participant in this workshop,
you are licensed to freely reproduce
and use the Strategic Planning
Model and resources to facilitate
planning within your own nonprofit
organization. Any other use requires
additional permission.**



**Tacoma, Washington
October 15-17, 2001**