



# Strategic Planning/SWOT (Advanced Track)

Amanda Green | February 12, 2024





## About Me

Amanda Green is an independent consultant who is passionate about supporting nonprofit organizations and leaders. She has more than 10 years of experience in the nonprofit sector and has worked with more than 100 nonprofit organizations. Amanda's specialities include strategy and strategic planning, organizational assessments, and board development. She has worked with organizations of all sizes and has led initiatives focused on financial sustainability for community-based organizations.

# Learning Objectives

By the end of this session, participants will be able to:

- Reflect on past strategic planning sessions to improve the experience for all stakeholders.
- Know the right people, tools, and experts to bring into the process.
- Create steps to ensure follow through on the desired outcomes.





# Agenda

## Preparing for Your Strategic Plan

- Reflection
- Facilitation methods
- Preparation tools

## Developing and Implementing Your Strategic Plan

- Key roles
- Implementation tools

Q&A

# Preparing for Your Strategic Plan



# Reflection



# Strategic Planning Is an Opportunity for Reflection

**Strategic planning creates an opportunity to review and assess:**

- The "organization's broader ecosystem" of key stakeholders, including staff, board members, and other strategic and community partners.
- How well a nonprofit is currently meeting its mission, vision, and impact goals.
- How effective the organization has been in implementing its strategies and securing and leveraging resources.
- If the organization is agile and ready to engage in intermittent planning and course correction.



# Facilitation Methods







“

*Ask yourself:*

*Do we want to prepare the strategic  
plan ourselves?*

*Or do we want to hire a consultant?*

”

# Doing It Yourself



# Reasons to Conduct Strategic Planning Internally

You may consider conducting your strategic planning process internally if:

- "You have internal expertise. ...
- You do not have the budget. ...
- You have an existing plan that only needs minor changes." (Thrasher Brim, 2022b)



# Reasons to Hire a Consultant



**You may consider hiring a consultant to facilitate your strategic planning process to:**

- Educate you and your team on different ways to approach strategic planning, particularly if you haven't done it before.
- Ensure that everyone can play a role as a participant—it can be challenging to be both a facilitator and a participant simultaneously.
- Serve as a neutral party and provide an outside perspective to the discussion.
- Read the room and ask the tough questions.

# Hiring the Right Consultant



# The Role of a Consultant

**"A strategic planning consultant oversees an organization's strategic planning process, manages stakeholder participation, and ensures successful execution."**

## Five Reasons to Hire a Consultant

1. Save time
2. Save money
3. Build authentic consensus
4. Strengthen internal alignment
5. Benefit from priceless expertise



# How to Choose a Consultant



## Things to look for:

- Experience and a proven track record
- Understanding of your type of organization (size, impact area, etc.)
- Proposed scope (How detailed is their process? What is your expected time commitment?)
- Models used (Does the model and methodology resonate with you?)
- Fees (Does the consultant outline their fees, and is this expense in your budget?)

# Preparation and Implementation Tools





# SWOT Analysis



# Elevating the SWOT Analysis

## Strengths

- Board and staff are aligned around the organizational mission and vision
- Positive feedback from clients

## Weaknesses

- Challenges with recruiting and retaining talent
- Majority of funding comes from a single source

## Opportunities

- Form new collaborations with community partners
- Serve more communities by replicating existing programs in new locations

## Threats

- Decrease in government funding allocated to nonprofit organizations
- Referrals are often directed to other agencies

A SWOT analysis can support strategic planning efforts and goal-setting; however, it **should not be the only tool** used to make important decisions.

# Elevating the SWOT Analysis

**Organizational Goal:** Become the premier women's treatment center in California

- List **Strengths, Weaknesses, Opportunities, Threats**
- For **Strengths** and **Opportunities**, qualify as follows:
  - **Somewhat Helpful (+), Helpful (++)**, **Very Helpful (+++)**
- For **Weaknesses** and **Threats**, qualify as follows:
  - **Somewhat Harmful (-), Harmful (--)**, **Very Harmful (---)**

# Elevating the SWOT Analysis

## Strengths

- Board and staff are aligned around the organizational mission and vision (++)
- Positive feedback from clients (+++)

## Weaknesses

- Challenges with recruiting and retaining talent (--)
- Majority of funding comes from a single source (---)

## Opportunities

- Form new collaborations with community partners (+++)
- Serve more communities by replicating existing programs in new locations (++)

## Threats

- Decrease in government funding allocated to nonprofit organizations (-)
- Referrals are often directed to other agencies (--)

# Landscape Analysis



# Landscape Analysis

"**Landscape analysis** involves identifying the key players in a field, sector, or geography and classifying them by relevant characteristics (e.g., type of organization, target beneficiary)."

**This classification "helps nonprofits understand the broader context in which they are operating, and design their strategy to maximize their impact."**

## Methodology:

1. **Set objectives:** Identify the goals and determine key questions.
2. **Define the scope:** Who should be included?
3. **Decide what information to gather:** Identify data-collection points.
4. **Conduct your research:** Determine your research methods.
5. **Synthesize and analyze your data:** What did we learn?

# Performance Measurement



# How Are You Tracking Against Your Current Strategic Plan?

**"Performance measurement** enables an organization to continuously learn and improve, which helps it to achieve better results. The metrics tracked should be derived from an organization's intended impact and [strategies]—what the organization is holding itself accountable for achieving and how to get there.

**"By measuring performance, nonprofits can:**

- Track progress towards and be held accountable for [the goals outlined in their strategic plan]
- Ensure programs or initiatives are implemented as designed
- Learn about ways to achieve even better results by analyzing insights
- Communicate progress and successes internally and externally to staff, beneficiaries, funders, peer organizations, and the broader community
- Over time, gain insights about program effectiveness and what works and, if appropriate, prepare for rigorous program evaluations"



# How to Engage in Performance Measurement

## Choose What to Measure

- Select "the indicators that you will use to track your organization's progress toward" executing its strategic plan.

## Determine How to Measure Data

- "Determine how will you collect [and store] your data for each indicator."
- Establish "when you will measure each indicator and who will be [accountable]."

## Leverage Your Data

- Build your dashboards and "establish a team and schedule for reviewing" them.
- "Finalize measurement and reporting responsibilities. Understand how to analyze your data."

## Review and Repeat

- Review your data and your performance-measurement process.
- Develop baseline indicators and update targets. Leverage these for your next annual or strategic planning cycle.

# Key Indicators

## Organizational Health Indicators

- Financial Sustainability
- Team Capacity
- Implementation Effectiveness

## Program Performance Indicators

- Activities
- Outputs
- Quality
- Program Costs

## Social and Economic Impact Indicators

- Outcomes
- Outcomes Costs
- Systemic Impact Generated

When in doubt,  
keep it simple!

Focus on what's  
most important to  
understanding  
your progress on  
your strategic  
plan.

(Wolk et al., 2009)

# Measurement Tools



**Longitudinal  
Tracking**



**Surveys**



**Interviews and  
Focus Groups**



**Online Data  
Collection**

# Developing and Implementing Your Strategic Plan



# Key Roles

Ideally, both **board and staff** are engaged in the strategic planning process.

If your organization is smaller, your board may play a more significant role.

**In either case, as part of the strategic planning process, both board and staff should:**

- "Commit to measurable goals,
- "Approve priorities for implementation, and ...
- "Plan to revisit the strategy on an ongoing basis as the internal and external environments change."

To keep your strategic plan top of mind, make sure to highlight your organization's strategic initiatives in board meeting agendas and allow time for updates and discussion. This could be an opportunity for staff to present to the board and develop leadership skills.



# Implementation Tools

As you begin to implement elements of your strategic plan, a best practice is to leverage a tracking tool.

There are MANY tools that you can use to track the implementation of your strategic plan.

This includes translating your strategic priorities into detailed initiatives and actions, allowing you to concisely view each of their high-level characteristics, resources required, timelines, and systems of accountability.

# Learning Objectives

By the end of this session, participants will be able to:

- Reflect on past strategic planning sessions to improve the experience for all stakeholders.
- Know the right people, tools, and experts to bring into the process.
- Create steps to ensure follow through of the desired outcomes.



# Q&A





## **Next Session**

**Monday, March 4, 2024**

**12:00 p.m. – 1:15 p.m. PST**

**Topic: Board Development & Governance**



**Thank You**

# References

- The Bridgespan Group. (2011, December 8). *Create a blueprint for change*. <https://www.bridgespan.org/insights/create-a-blueprint-for-change>
- The Bridgespan Group. (2016a, January 15). *Market mapping and landscape analysis*. <https://www.bridgespan.org/insights/market-mapping-and-landscape-analysis>
- The Bridgespan Group. (2016b, January 15). *Performance measurement and improvement*. <https://www.bridgespan.org/insights/performance-measurement-and-improvement>
- Wolk, A., Dholakia, A., & Kreitz, K. (2009). *Building a performance measurement system: Using data to accelerate social impact*. Root Cause. <https://search.issuelab.org/resource/building-a-performance-measurement-system-using-data-to-accelerate-social-impact.html>
- Funding for Good. (2023a, February 13). *Strategic planning consultants: Your complete guide*. <https://fundingforgood.org/strategic-planning-consultants-guide/>
- Funding for Good. (2023b, February 16). *Why to hire a consultant for strategic planning*. <https://fundingforgood.org/why-hire-a-consultant-for-strategic-planning/>
- National Council of Nonprofits. (n.d.). *Strategic planning for nonprofits*. <https://www.councilofnonprofits.org/running-nonprofit/strategic-planning-nonprofits>
- Soronen, R. (2023, September 20). Council post: The importance of strategic planning for nonprofit organizations. *Forbes*. <https://www.forbes.com/sites/forbesnonprofitcouncil/2023/09/20/the-importance-of-strategic-planning-for-nonprofit-organizations/?sh=73783cb1bb2b>
- Thrasher Brim, S. (2022b, May 31). *Strategic planning - do I need to bring in a facilitator?* LinkedIn. <https://www.linkedin.com/pulse/strategic-planning-do-i-need-bring-facilitator-stacye/>