

A photograph of a diverse group of business professionals in a modern office setting. They are seated around a conference table with laptops and documents, engaged in a meeting. The scene is brightly lit with large windows in the background.

How to Ensure Your Strategic Planning Powers Organizational Success

BY TRACEY STOREY

Strategic plans are incredibly valuable tools, particularly for nonprofit organizations that are always trying to balance meeting the needs of those they serve with often increasingly fewer resources.

Strategic planning is a critically important way to align the deployment of those scarce resources with your organization's mission and vision. Writing one that reflects the real challenges and opportunities you and your team face, and that serves as a meaningful touchstone for all staff, is worth the extra effort and hard work of really listening to your constituents and being bold enough to say no to some things so you can say yes to those that will truly serve your community and grow your organization.

Are You Ready for a Strategic Plan?

Many organizations have strategic plans—some even have more than one—but all too often people forget about their plan when progress isn't carefully tracked, it isn't reviewed

regularly, or it is not used as a meaningful guide to annual operational plans, rendering it irrelevant to the institution's decision making.

So how do you make sure that your strategic plan does more than sit on a shelf and gather dust? How do you know when your organization is ready to write its first strategic plan or update its existing plan?

Below are a few questions you should ask yourself as you consider undertaking a strategic planning process:

Is the timing right?

It might be time to revisit your strategic plan if there has been a recent change in leadership or if the previous plan is approaching its end date. It might also be a good idea to think about revisiting the plan if there has been a significant change in the environment affecting your organization's operations or programs, if it is experiencing a significant change to its financial resources, or if it is entering into a new comprehensive campaign. Any significant change to an organization's leadership,

operations, or resources is an appropriate time to take a collective moment and reflect on who you aspire to be and chart your path to getting there with the new leadership, environmental factors, and resources taken into account.

Are you ready to listen?

If it seems like the right time to write or rewrite a strategic plan, the leadership team must consider whether it is ready to listen. In order to draft a relevant and actionable plan, it's critical that important constituencies from across the organization be invited to share their expertise and perspectives. You will hear a wide range of opinions about what is working well and what isn't, and why. The conversations will surface insights about the organization that talking only with your leadership team won't simply because their view of the organization is different. I'll share more below about why it is important to listen, but do consider whether or not you are open to hearing a range of perspectives as you consider whether you are ready to launch a strategic planning process.

Are you ready to get real?

Finally, at its core strategic planning is about prioritizing select work or programs and deprioritizing others in order to move the organization closer to its desired state. Sometimes organizations, particularly those in the nonprofit sector, are so focused on serving their students, physicians, patrons, members, etc. that they are reluctant to stop doing things that those community members value. But if you are going to create an actionable, realistic plan, you owe it to your community and staff to get serious about prioritizing those aspects of the organization that will expand your capacity, deepen your impact, and help you serve your community better. Only when you prioritize your work can you draft a strategic plan that will prove helpful in realizing your long-term goals and

then create the annual work plans and performance indicators that will guide your day-to-day activities.

Ensuring Your Strategic Plan is More Than Just a Plan

Now that you know you are ready to adopt a new (or your first) strategic plan, how do you ensure that the plan you draft becomes more than just a plan?

Here are five steps you can take to ensure your plan is more than just a plan:

1. Develop Strategic Thinking

A good strategic planning process invites you to view your work from a new angle and as part of a larger enterprise. It's easy to get caught up in day-to-day operations and lose sight of the bigger picture and allow urgent rather than important tasks to consume your time and energy. Thinking strategically involves the ability to anticipate, analyze, and respond to a complex and ever-changing environment. As you craft your strategic plan, encourage your team to explore different perspectives, challenge assumptions, and identify emerging trends. By honing this skill, your organization becomes better equipped to navigate uncertainties and capitalize on opportunities and integrate the vision and goals of your strategic plan into their day-to-day work and planning.

2. Plan for Uncertainty and Change

It's important for a strategic plan to be stable but not rigidly fixed. To ensure its effectiveness, you must embrace a culture of continuous learning and improvement. Develop objective measures of your progress on fulfilling your strategic goals, regularly assess the plan's impact, and gather feedback from stakeholders.

Expect change. A robust strategic plan not only acknowledges this reality but also equips your organization to accommodate it. As you formulate your plan, consider creating flexible



frameworks and regular reviews of your environment that make it possible for you to pivot when needed without derailing your overall vision.

Expect setbacks. Prepare your team to treat them as opportunities for growth and refinement, rather than roadblocks. By acknowledging the inevitability of change and using the planning process to develop a strategic thinking mindset, you empower your organization to both stay true to its core commitments and evolve and innovate.

3. Engage and Empower Your Team

Your strategic plan is not solely the responsibility of upper management. Engage your entire team in the planning process, leveraging their diverse perspectives, skills, and expertise. When employees have a stake in the plan's creation, they become more invested in its execution. Encourage open dialogue, solicit feedback, and empower your team to take ownership of their respective roles in realizing the strategic vision. A collaborative approach fosters a sense of

shared purpose and a stronger commitment to the plan's success.

4. Align Resources and Priorities

A well-crafted strategic plan requires more than just lofty aspirations; it demands a clear allocation of resources and strategic prioritization of initiatives. Ensure that your plan is grounded in a realistic assessment of available resources, including finances, workforce, and technology. Align your goals with your organization's core competencies and competitive advantages. By making resource allocation a key aspect of your strategic planning process, you enhance your plan's feasibility and increase the likelihood of successful implementation.

5. Communicate Effectively

A strategic plan is only effective if it is understood and embraced by your entire organization. Transparent and effective communication is essential throughout the planning and execution phases. Clearly articulate the plan's objectives, rationale, and

expected outcomes to all stakeholders. Regularly update and engage your team on progress and milestones. Share with your staff when and why you have modified the plan's initiatives or tactics and invite them to share their expertise and perspectives. When everyone understands the plan and feels part of the planning effort, the plan is both stronger and better able to respond to uncertainty and change.

Who Gets a Seat at the Table When Writing a Strategic Plan?

Once you know you are ready to draft a new strategic plan, there are two questions you must answer: Who will you involve in the planning process? And when will you involve them?

Those in charge of the planning process generally agree that key leaders at the top of the organization, who oversee its most crucial areas, must be involved in creating the strategic plan from its initial stages through to its final release and implementation. Less obvious may be when to include those from across the organization and why.

Staff at other levels of the organization are often only included in the later stages of the process when the plan is all but complete. At that point, they are typically asked to affirm the plan, embrace it, and begin to apply it to their team's work plans or their individual responsibilities. Leaders who only bring in the broader cross section of their staff at this point are missing an opportunity to learn more about their organization and understand the experiences of staff at all levels. They also miss an important opportunity to develop a better strategic plan that is more likely to be embraced and implemented across the organization.

Individual contributors and line managers have invaluable insights into your operation—where your bottlenecks are, why you keep running into the same challenges, what drives your organization's culture, and much more. And while their insights into those issues may be

constrained by their perspective, it is also informed by it. We sometimes have a tendency to listen to the experiences and perspectives of our peers but to dismiss the experiences of others as uninformed or less important, particularly those lower on the organizational chart. Because strategic planning is initiated by leadership, it tends to reflect their understanding of the organization and its strengths and weaknesses. Only by making room for everyone around the table through a deliberate and sustained effort to solicit and incorporate the insights of staff at all levels can we overcome this tendency.

When organizations make the effort to adopt a more holistic approach to strategic planning and engage their staff throughout the process, the final result is sure to be better and the likelihood of the team embracing the organization's new strategic priorities and aspirations will be much stronger.

Following are several tried and true tips for including various voices in the strategic planning process:

- **Talk about the planning process early and often.** Commit to transparency about the process by leveraging existing communication channels to provide updates on the plan's development. This is a simple and effective way to signal that you value your staff and their role in the development and execution of the strategic plan.
- **Provide avenues for people to participate.** Consider organizing workshops and focus groups to facilitate discussions and idea generation. These collaborative sessions can help foster a sense of shared ownership and encourage participants to contribute their unique insights.
- **Ask them to be a part of an organization-wide survey.** Utilize surveys to gather diverse perspectives. Surveys are an effective and manageable way to invite all

of your staff and stakeholders into the strategic planning process.

- **Use your leaders and managers to provide more ways to participate.** Provide your leadership and managers with information and talking points that they can use to keep their teams engaged and informed. Ask them to invite their team's feedback and insights and provide a channel for them to share it with the planning group.
- **Tell them when and where their feedback made a difference.** Assure staff that their participation will be valued and heard. As the plan comes together, take note of those elements of the plan that were particularly shaped by the contributions of those not at the leadership level. Recognize the importance of everyone's voice in the process when you release the final plan.

Involving a diverse range of stakeholders in the strategic planning process can greatly enhance the effectiveness and impact of your nonprofit's strategic plan. Writing the plan should be a collaborative and inclusive effort, harnessing the collective wisdom and insights of all those involved in helping you accomplish your

ambitious vision for your organization. When everyone has a seat at the table, you and your nonprofit can more effectively chart a course that leads to long-term success for yourself and your community.

In Conclusion

By thoughtfully considering the purpose behind embarking on a new strategic planning process, assessing your preparedness, carefully engaging your staff and stakeholders, and focusing on crafting a plan that is both meaningful and impactful, you will lay the groundwork for a transformative strategic planning journey. You can foster a culture within your organization that embraces strategic thinking, adaptability, and resilience. The process should instill a shared commitment to your mission and vision, fostering a collaborative environment rich in learning and focused on your mission. Ultimately, your strategic plan should be more than a document; it should be a road map that steers your organization with confidence and clarity through the ever-changing landscape of the nonprofit world and magnifies your impact in the years to come.

ABOUT THE AUTHOR



Tracey Storey, associate vice president of nonprofit enterprise strategic planning at BWF, provides clients with the transformational potential of nonprofit strategic planning. With over 15 years experience in the nonprofit sector, Tracey makes disciplined and bold choices for organizations to help them reach their full potential. Connect with Tracey to learn more at tstorey@bwf.com.

WHO WE ARE BWF is a leading nonprofit solutions company offering a comprehensive suite of services to support and advance the philanthropic goals of its clients. With a global footprint, BWF serves a diverse range of organizations, including colleges and universities, health systems, environmental organizations, and NGOs across the globe. At the heart of BWF's service offering is a full spectrum of capabilities encompassing campaigns and fundraising strategies, operations and technology solutions, and engagement and donor experience services as well as enterprise solutions. These services are underpinned by the innovative approaches and insights from BWF's Innovation Hub, ensuring that clients not only meet their immediate goals but also contribute to positive change in the broader industry. BWF's team comprises consultants with in-depth backgrounds and experience across every facet of philanthropy, ensuring a truly comprehensive approach to fundraising consulting. This combination of wide-ranging expertise and innovative methodologies positions BWF uniquely to elevate its clients' outcomes and shape future trends within the philanthropic sector. **800.921.0111** bwf.com ©2024 BWF®