5 SIMPLE STEPS TO STRATEGIC PLANNING SUCCESS

You will kick-off the strategic planning process by looking at what your organization wants to be and wants to achieve in the future. We’ll call this your desired state. This simple exercise will help to stimulate thinking about what’s possible and to dislodge your strategic planning team from any limiting beliefs about real and perceived obstacles for your organization. Starting by looking at what’s possible will raise the level of energy, creativity, and excitement among your team that will carry throughout the strategic planning process.

WHAT’S A 10?

In this exercise you’re going to imagine that, on a scale of 1 to 10, your nonprofit is a 10 across the board. In all areas of organizational performance, you are hitting it out of the park. What would that look like for your nonprofit?

The worksheets on the following pages will help you to complete this exercise. They have been broken down by the main dimensions of a typical nonprofit organization (programs, governance, fund development, etc.). You may choose to stick with this list, or you may customize it to fit what is most important or relevant for your organization.

For each organizational dimension, describe what a 10 would look like. What are the main characteristics? For example, a 10 for governance may be a board of fifteen engaged and diverse members all of whom who give significant time, treasure, and talent to your organization. Remember to hold the perspective “what’s possible?”

This is a great exercise to complete together with your strategic planning team. You can transfer the below worksheets to large flip chart paper and have everyone contribute to the development of your desired state.

UP NEXT

In step 3, you will assess your organization’s current state. As part of that process you will score your current performance, on a scale of 1-10, in each organizational dimension. Then we’ll look at how you can close the gap between current and desired state.
What's a 10?
FUND DEVELOPMENT:

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FINANCIAL MANAGEMENT:

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ADMINISTRATION AND INFRASTRUCTURE:

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HUMAN RESOURCES AND LEADERSHIP:

WHAT'S A 10?
CULTURE AND COMMUNICATION:

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GOVERNANCE (BOARD):

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PARTNERSHIPS:

WHAT'S A 10?