



# small nonprofit strategic planning services

*Strategic planning is important for any nonprofit, no matter the size. For small nonprofits, it can be the difference between constantly “just getting by” and building the foundation for sustainable income and programming. We created these self-guided strategic planning packages so that small nonprofits can get expert, clear guidance without paying 10s of thousands of dollars for full-suite external facilitation and research.*

## ✦ Every package includes a 37-page comprehensive Strategic Planning Guide

- Walks you through the same process we use when we provide full-suite external facilitation and research.
- Includes definitions, examples, tips and suggestions, important considerations, guidance for tailoring it all to your specific organization and circumstances,
- Think of it like a workbook/textbook for strategic planning.
- Includes Google Forms templates for board+staff and external stakeholder surveys (can easily be imported into Survey Monkey).
- Saves you the time and guess work it takes to comb through (often conflicting) articles and examples online.
- Gets your whole team (board + staff) on same page about the purpose, process, and end product of strategic planning.
- Helpful for newbies and experts alike.

	self-guided (\$595)	self-guided+ (\$1065)	guided review (\$2155)	partial facilitation (\$4935)
Q&A consult hours	2	4	6	6
Review of Strategic Plan			✓	✓
Custom Facilitated Retreat Hours				4

**Not your grandpa's Strategic Plan:** These aren't detailed, bulky documents or complex spreadsheets that pin your organization down under their unnecessary weight. You'll be creating, dynamic, flexible, nimble Strategic Plans.

# How does it work?

## ✦ **You're creating your Strategic Plan, using the Guide.**

- We recommend giving yourselves a generous 6 months total, from start to finish.
- The Guide walks you through how to facilitate the process internally. It will include creating a Strategic Plan Task Force to lead and manage the process.
- No matter what package you choose:
  - we'll work together to determine how you want to use your consultation hours – this part is flexible to meet your specific needs.
  - you can feel free to email us with clarifying questions if there's anything in the Guide that isn't clear to you.

## ✦ **When your package includes review ....**

- We will review your Strategic Plan elements and provide comments and suggestions once., but we're happy of course to answer questions about our comments – this works best via shared, online documents and answering questions within the document.
- You can choose for us to do this review after the Strategic Plan Task Force has created the first drafts (and before they're presented to the full board) or after the full team has discussed and provided their input. (We can help you determine which would be best in your case).
- It's often a good idea to save one of your consultation hours for going over the review.

## ✦ **When your package includes a facilitated retreat ....**

- Usually, this retreat is used at the end of the process, for us to wrap up the finalized strategic plan together and begin to talk about implementation plans.
- Sometimes, part of the strategic planning process can become contentious or difficult to reach common ground – in that case, you may decide to use the retreat time for working through stumbling blocks.
- This isn't a pre-boxed retreat – it's tailored specifically for you, and we'll help you determine when and where in the process to hold it and what the agenda should be.

## ✦ **What are the parts of a Flexible Strategic Plan?**

Again, this isn't a complex spreadsheet or a many-pages long detailed document. It's a set of discrete elements that, together, provide strategic direction and keep your organization nimble to adapt to new opportunities and unexpected challenges in a constantly-changing world..

- Contextual Research (SWOT analysis; program ROI analysis, stakeholder input; review of Mission, Vision, and Values; DEI/JAB Audit)
- 3 - 5 high-level Outcome Goals (no sub-goals)
- Scenario Planning
- Budget Alignment & Risk Tolerance Assessment
- Accountability Mechanism (Project Tracker tool + metrics)