

# “Ten Top Tips for Strategic Planning for NPO’s”

*by Marta Brockmeyer, Ph.D.*

Forward thinking non-profit organizations understand the need for and benefit of a well researched strategic plan. However, buzz words such as measurements, outcomes, mergers, results, duplication of services, competition and milestones can cause even sophisticated senior staff and volunteers’ considerable heartburn and anguish. Here are ten specific ideas to help your organization as it prepares for or revisits a strategic planning exercise.

➤ **Be sure your organization will benefit.**

Assess the community climate and the organization’s senior leader’s skills to know if the timing is right. Make sure the organization has the capacity and energy to begin and successfully complete this process.

➤ **Adopt simple, clear terminology.**

Define strategic planning and gain support for its meaning. Keep in mind that planning terms are used differently in different cultures. For example, objective means different things in different places. This may be particularly confusing for Board members who are involved with other professional and volunteer activities.

➤ **Set realistic time frames.**

Ten year plans are unrealistic in most cases. In the non-profit world, three years is as far into the future as most groups can consider. Also, implementation plans are greatly limited by budget cuts, staff shortages and increased work loads. Be real about what the organization can take on.

➤ **Integrate the planning with Board development.**

The planning process brings a natural, positive opportunity for Board members to be more actively involved in the organization. The Board can create new expectations for membership, expand its roles and influence fundraising.

➤ **Engage stakeholders.**

Strategic planning offers an ideal way to connect with those in the community. The conversations often lead to new initiatives which meet funders’ preferences for supporting collaborations.

- **Involve employees at all levels.**  
Staff members have a unique ability to assess the needs, know what programs are not working and offer creative solutions. Since people support what they help create, their input should be requested early. And they must know that their thoughts matter—that this is not just an exercise.
  
- **Ask clients what’s missing.**  
It’s common to confer with “experts” in the field. But the people who live real lives that are the focus of an organization’s mission often know what is best needed. Collect client comments, take them seriously and deliver feedback when the planning is completed.
  
- **Design the implementation process before goals are set.**  
Strategic plans fail because they are not implemented. To counter this common problem, establish and publish the implementation steps before the plan is finalized. People will have more trust in the process and much time will be saved.
  
- **Charge one person with implementation leadership.**  
Plans have no inherent value without action and it can be difficult for busy employees to remain focused. Put one person in charge and hold them accountable.
  
- **Revisit the plan.**  
Build in regular dates for reviewing, evaluating and changing directions as needed. The strategic plan should accommodate a few turns and occasional revisions. The end date should always be kept in mind, however, and a formal date for starting the next plan’s development should occur before the end of the current plan.

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