

Strategic Planning: Achievable for All

How do you plan to meet the changing needs of your community?

Strategic planning allows a nonprofit organization to address the realities of the present and anticipate changes in the future. Like map making, planning helps to pinpoint where your organization stands now and identify a destination for its future, along with a route for leading your team there.

Why aren't more nonprofits engaging in strategic planning? There are a number of reasons, some of which have to do with the myths and misperceptions about strategic planning...but we're here to help you straighten things out.

The Top 5 Strategic Planning Myths

Myth 1 — It takes too much of our valuable time.

Good planning can be accomplished in a few weeks spread over the course of a year if you are well prepared and committed to change. Time spent planning is not time wasted.



Myth 2 — Our operations or our community are too small for planning.

Strategic planning is valuable no matter the agency's size, geography, or funding. If you're small, your plan can simply reflect your community's top needs and how your top priorities address them.



Myth 3 — We're doing fine; why would we need to plan?

Waiting for a crisis is how most organizations fail. Building a good planning process and habits goes best when your vision is clearest—when things are calm and needs can be looked at objectively.



Myth 4 — Strategic planning has no impact on funding.

If done well—aligning needs, strengths, trends, insights, and opportunities—planning will always have a positive impact on your short- and long-term funding.



Myth 5 — Planning for the future and all of its unknowns is a futile activity.

While no one can predict the future, good strategic planning includes known factors and trends you and your team can address through the lens of vision, shared values, and high-impact goals.



Strategic Planning: The Basics and Benefits

When you overcome the myths surrounding strategic planning, keys to success include the ability to engage the right people, ask the right questions, collect relevant data, and communicate valid assumptions about current and emerging trends in the communities you serve.

Strategic planning allows your organization to address the realities of the present and anticipate changes in the future. Partner with Wipfli, and we can customize and facilitate a planning process to help you align your people and resources with your nonprofit's vision and future objectives.

Wipfli's six-step, proven process includes:

1

Evaluating your mission, vision, and values.

Do they reflect your current realities and your culture? The statements should be consistent, aligned, flexible, and concise to lead your organization into its uncertain but promising future.

2

Conducting community needs and landscape assessments.

Do you know what your community needs and values? Good planning requires you to do your homework by collecting and analyzing internal and external data.

3

Conducting strategy and goal evaluation sessions.

What's your plan to connect your community needs to a theory of change that uses your agency's strengths? Open the boardroom door to expand collaboration and innovation.

4

Developing an action plan.

What barriers prevented your last strategic plan from being implemented? Create an action plan that includes accountability, communication, and change management.

5

Implementing the plan.

Is your team committed to follow-through and success? Strategic leadership begins with clear expectations, consistency, and holding yourself and others accountable to the vision and plans.

6

Evaluating the strategic plan and your progress.

How do you know when all of your plans are working? While celebrating small wins is vital, it should be followed by regular check-ins on every goal, careful attention to more detailed plans, and an annual review of the whole process.

It's time to create your strategic plan. Get started with our Strategic Plan Review:

Learn more about how to maximize your impact in the community by taking advantage of our Strategic Plan Review. The review, completed by Wipfli's experts, includes:

- A review of your plan compared with best practices from around the country.
- An opportunity to take part in a credible, third-party analysis.
- Recommendations and next steps for improvement.



Contact us today:

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