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# Strategic Planning for Organizational Success

by Cathy Lieberman

In the world of nonprofits, 2009 was the year of emergency room triage.

The economic crisis following the stock market collapse of 2008 decimated the investment portfolios of nonprofits, foundations and individual supporters alike.

Executives at nonprofits were forced to make wrenching decisions on which programs to fund at all cost, which were no longer viable, which could muddle along and which could wait. Organizations that confront crises head-on can ultimately strengthen their purpose, forging new and powerful strategies.

A strategic planning process can help organizations get creative and concrete about the strategies that will help them better succeed. A strategic planning process should encompass six steps:

## Step 1: Clarify the problem or opportunity

This is the time for a planning group comprised of leaders to review or create the long-range vision for the organization.

The mission statement then becomes the connecting bridge between where the organization is now and where it wants to be in the future. Both the vision statement and the mission statement should be short and specific. Getting a clear picture of where the organization stands is also part of this phase.

To do that, the planning group should evaluate the organization's opportunities, the issues that could pose a threat to its mission, and obtain a solid understanding of the organization's financial footing.

## Step 2: Outline the process for developing and selecting strategies

A strategy is a coordinated set of actions aimed at creating and sustaining a competitive advantage in carrying out the organization's mission. Strategies align decision making so that the mission, programs, and operational systems all work toward the same ends.

Objectives or goals are desired results to be achieved, usually with specific timelines, therefore increasing the odds of fulfillment. Goals should be actionable, providing the ability to lead and motivate. The more concrete and specific they are, the more likely they are to have directive power.

They should be somewhat aggressive requiring both imagination and perseverance. They must be understood by those who are assigned to develop the means to achieve them, and they need to continuously evolve.

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ASFA is a not-for-profit organization established to provide productive resources, tools and guidance for education foundations to advance public education in the United States. The mission of ASFA is to create a nationwide community of education foundations and to serve those foundations by providing essential and timely information to ensure the success of these vital institutions.

If you are interested in learning more about ASFA, please contact Nancy Dye, Executive Director, at 312-930-9136 or email at [dyen@asfalliance.org](mailto:dyen@asfalliance.org).

### Step 3: Establish criteria for success

The scope of each objective or goal within the strategy must be “SMART,” or specific, measurable, achievable, realistic and time-bound.

Goals are often linked to sub-goals which are set to identify the specific activities required to meet the goal. Goals and sub-goals must involve a tangible, clear desirable result that can be measured with a specific beginning and end point. Sub-goals may seem secondary, but they are, in fact, what drive organizations to succeed. When sub-goals are met, the odds of achieving the dominant goal become virtually inevitable.

### Step 4: Brainstorm, prioritize and select viable strategies

By ranking priorities, organizations determine which strategic items will require the development of specific action plans for implementation within the next six to 18 months.

The vast majority of top-prioritized goals require first-year action plans.

### Step 5: Articulate clear, measurable action plans

The outcome of the strategic planning process is a portfolio of action plans. Every action plan should specify the dates the plan will be achieved and who is responsible to see it through.

The operational process is about moving from theory to reality. Strategic effectiveness is achieved by setting the right long-term priorities and implementing them; making sure the right things are accomplished the right way at the right time.

Responsible parties must have the authority and capability, as well as the obligation, to get the job done. Components of the organizational process include acquiring, developing and transitioning people over time.

### Step 6: Define ways to measure progress and success

The measurement process is about understanding how effective the group is at executing strategic, operational and organizational processes.

Implementing monitors and controls for each step taken to complete the task will enable the organization to stay on schedule.

Plans must be reviewed and evaluated consistently. A monthly executive review meeting is recommended.

The organization’s leader is responsible for engaging everyone in a singular, common purpose. He or she must have objective and independent data to measure results and to reduce the gap between perceived success and actual results.

While employees may advocate for changing the direction, a living strategic plan with updated action plans will continue to clarify and support the vision. The strategic plan along with the wisdom from accumulated experiences and skills will enable the leader to keep employees focused on their collective mission.

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