

Benefits of Strategic Planning

- Strategically allocates and prioritizes your organization's limited resources
- Engages internal and external stakeholders
- Results in a unified vision and direction
- Supports data-driven decision-making
- Increases transparency within the organization and with stakeholders (funders, community partners, clients)
- Develops systems to help you set, achieve, and measure progress towards goals
- Creates a springboard for resource development and board development

STRATEGIC PLANNING

The NPO Solutions approach to strategic planning engages the organization's leadership and key stakeholders to ensure a comprehensive representation of ideas and voices in the final product. NPO Solutions has helped over 50 organizations plan for success by strategically allocating limited resources to expand programs in challenging financial times; developing and strengthening the fundraising capacity of the staff and board; deepening engagement of board members, donors, and program partners; and cultivating the leadership necessary to move the organization forward. NPO Solutions guides nonprofit leaders through a rigorous strategic planning process, resulting in a unified and broadly supported roadmap. Recent clients include Pacific Clinics, Long Beach City College Foundation and The Whole Child.

STRATEGIC PLANNING PROCESS



NPO Solutions works with the Executive Director to form a Strategic Planning Task Force consisting of 15-20 stakeholders (e.g., board, staff, community partners, funders) that meets 3-4 times over 3-4 months to review data and trends to shape the strategic direction of the organization.

Step 1: Resource Audit – A nine-part diagnostic to assess organization strengths and weaknesses in key functional areas such as mission, programs, constituency development, communications and finances.

Step 2: Research and Analysis – Based on preliminary findings from the Resource Audit, NPO Solutions consultants conduct additional research—reviewing industry trends, conducting stakeholder interviews, and administering surveys and focus groups—to test assumptions and to support recommendations.

Step 3: Strategic Plan – NPO Solutions consultants work with staff and the Task Force to develop a strategic direction, strategic goals, and strategic activities to guide the organization's efforts over the next 3 years.

Step 4: Operating Plan – NPO Solutions partners with staff members to create an annual Operating Plan that supports Strategic Plan implementation. The Operating Plan details the key activities, timelines, and persons responsible needed to achieve goals.

Step 5: Balanced Scorecard – A companion piece to the Operating Plan, a Balanced Scorecard allows the organization to monitor and report on the achievement of performance goals and promote accountability throughout the agency. This formal framework enables the organization to review progress at regular intervals and celebrate achievements or make mid-course adjustments.



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