Creating a Strategic Plan that doesn’t collect dust after it’s made.

APRIL National Conference for Rural Independent Living
Oct. 21, 2021
Introduction

- Leadership roles for strategic planning, marketing, and development/fundraising for nonprofits.

- For almost 6 years, on the Executive Leadership team for a CIL as Director of Marketing.

- Started Aprosae, a strategic planning and marketing agency for the Independent Living movement.
  - Facilitator for two collaboratives that NCIL has run.
  - Presented at NCIL, APRIL, and state IL conferences.
  - Led marketing solutions for CILs across the U.S.

Michelle West
1 Overview of Strategic Planning
2 The 5 Parts of the Strategic Planning Process
3 Dust Prevention Plan
OVERVIEW
Why Strategic Planning?
Strategic Plan: A Living Document


© 2020 Copyright Aprosae | Graphic from https://www.researchgate.net/publication/316974197_Nonprofit_Needs_Assessment
What is the Strategic Planning Process?
What is the Strategic Planning Process?
What is the Strategic Planning Process?
MESSAGING
What is the Strategic Planning Process?

MESSAGING

- Mission
- Vision
- Core Values
- Brand Pillars
- BHAG
- Value Proposition

© 2020 Copyright Aprosae | Icons made by Freepik from www.flaticon.com
Why Messaging?

CORE VALUES
Laying the foundation for all efforts

VISION STATEMENT
The final product we work towards

MISSION STATEMENT
The blueprint - how we reach our goals

BRAND PILLARS
Framing & finishing - what makes us different and what we offer

BHAG
When we know we've hit our target; We passed inspection (measure)

VALUE PROPOSITION
Open House - telling others why they should join us
What is the Strategic Planning Process?

**MESSAGING**
- Segments
- Sub-segments
- Needs
- Benefits
- Relationship Types

**STAKEHOLDERS**

**PLANNING**

**ANALYSIS**

**RESOURCES**

© 2020 Copyright Aprosae | Icons made by Freepik from www.flaticon.com
Why Stakeholders?
## Stakeholder Analysis - Example

<table>
<thead>
<tr>
<th>Segment: The large groupings of Stakeholders</th>
<th>Sub-segment: Breakdown of the larger Segment</th>
<th>Stakeholder Need (e.g., from a gap or lack of something)</th>
<th>Benefit to Stakeholder: What they want from the builder to fill the need</th>
<th>Relationship Type (get, keep, grow, stop)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendors</td>
<td>Brick supplier</td>
<td>Sales/move product</td>
<td>Consistent business</td>
<td>Keep</td>
</tr>
<tr>
<td>Subcontractors</td>
<td>Bricklayers</td>
<td>Contracted jobs</td>
<td>Repeat business and referrals</td>
<td>Stop</td>
</tr>
<tr>
<td>Realtors</td>
<td>Relocation experts</td>
<td>Options and communication</td>
<td>Commission and customer service</td>
<td>Get</td>
</tr>
<tr>
<td>Buyers</td>
<td>Relo professionals</td>
<td>Quick move-in</td>
<td>Spec homes availability</td>
<td>Grow</td>
</tr>
</tbody>
</table>

© 2020 Copyright Aprosae | Icons made by Freepik from www.flaticon.com
PLANNING
The Planning Stage

MESSAGING
STAKEHOLDERS
PLANNING
ANALYSIS
RESOURCES

• Goals
• Strategies
• Timeline
• Measures

STRATEGIC PLAN

© 2020 Aprosae | Icons made by Freepik from www.flaticon.com
GOAL: Hit the center of the target

STRATEGIES
• Control breathing
• Determine the draw of the string
• Assess the timing for the release

TIMELINE: 2 minutes to shoot
3 arrows (indoor competitions);
4 minutes to shoot 6 arrows (outdoor).

MEASURES: Shoot 72 arrows at
the target set 70 metres away, in 12
ends (series) of six arrows. It takes
about two hours. They total their
points scores, up to a maximum of
720, and are ranked from highest to
lowest at the end of the round.
What’s the best goal?

1. Start a peer support group by December 2021 that has 12 regular attendees.

2. Establish a crossdisability peer support group where consumers develop a support network to reach their goals for greater independence.

3. Canvas the community and partner organizations to assess needs and gaps for a peer support group.
What’s the best goal?

1. Start a peer support group by December 2021 that has 12 regular attendees.

2. Establish a cross-disability peer support group where consumers develop a support network to reach their goals for greater independence.

3. Canvas the community and partner organizations to assess needs and gaps for a peer support group.
Some of the most popular ways to set goals are:

- OKRs (Objectives and Key Results) using Doerr’s Goal Formula: *I will (objective) as measured by (key results).*
- SMART goals (Specific, Measurable, Achievable, Realistic, and Timely)
- ACES (Achieve, Conserve, Eliminate, Steer Clear)
ANALYSIS
Strategic Planning Process

- Market Research
- SWOT Analysis
What is Market Research?

- Define the Goal
- Assess Research Need
- Determine the Research Approach
- Collect Data
- Analyze Data
- Communicate Findings

© 2020 Copyright Aprosae
What is a SWOT Analysis?
RESOURCES
Strategic Planning Process

MESSAGING

STAKEHOLDERS

PLANNING

ANALYSIS

RESOURCES

• Money
• People
• Time
• Assets

© 2020 Copyright Aprosae | Icons made by Freepik from www.flaticon.com
What are our resources?

- What budget do you need to complete the goal?
- Does your current budget contain any of the projected costs?
- If the goal isn’t revenue producing, where will the money come from?
<table>
<thead>
<tr>
<th>PROJECT FUNDING REQUEST/BUDGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yearly Project Costs</td>
</tr>
<tr>
<td>Year 1</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>Personnel Costs</td>
</tr>
<tr>
<td>Salary</td>
</tr>
<tr>
<td>Benefits</td>
</tr>
<tr>
<td>Travel Expenses</td>
</tr>
<tr>
<td>Other Project Costs</td>
</tr>
<tr>
<td>Other Costs (not subject to F&amp;A)</td>
</tr>
<tr>
<td>Modified Total Direct Costs</td>
</tr>
<tr>
<td>Project Costs</td>
</tr>
<tr>
<td>F&amp;A (Rept.1s), if applicable (for GRAR)</td>
</tr>
<tr>
<td>Total Project Costs (with F&amp;A)</td>
</tr>
<tr>
<td>Expected Revenue/Offset (if applicable):</td>
</tr>
<tr>
<td>Projected Net Balance</td>
</tr>
<tr>
<td>% of Expenses to Revenue</td>
</tr>
</tbody>
</table>
What are our resources?

- Support staff have their own goals and responsibilities. Have you coordinated with them?
- Do you need to outsource?
- Does your team have the talent (KSAs) needed to complete the goal successfully?
What are our resources?

- What percentage of time will it take for you and the other stakeholders to get the goal started?
- What percentage do the ongoing responsibilities take?
- Do you need to move some goals to other years?
What are our resources?

- Are there any software or hardware necessities to meet your goals?
- Are there any other assets you need?
- Do you have the budget for them?
Why look at resources?

1. Make sure our goals are SMART.

2. Determine what our strengths are so we can play to those.

3. Determine what potential threats we might face so we can plan ahead to make sure those don’t sabotage our efforts.
Strategic Planning Chart: Outputs

- **Messaging**
  - Key Statement Document

- **Stakeholders**
  - Stakeholder Map

- **Planning**
  - Goals for Fiscal Planning Year

- **Analysis**
  - SWOT Analysis

- **Resources**
  - Financial Dashboard
  - Project Management Plan

© 2020 Aprosae | Icons made by Freepik from www.flaticon.com
DUST PREVENTION PLAN
Which ones HAVE to be done this FY?

<table>
<thead>
<tr>
<th>FY</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
<th>Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal 1</td>
<td>Strategies</td>
<td>Strategies</td>
<td>Strategies</td>
<td>Strategies</td>
<td>Q1: Q2: Q3: Q4:</td>
</tr>
<tr>
<td>Goal 2</td>
<td>Strategies</td>
<td>Strategies</td>
<td>Strategies</td>
<td>Strategies</td>
<td>Q1: Q2: Q3: Q4:</td>
</tr>
</tbody>
</table>
## Vetting Each Goal

<table>
<thead>
<tr>
<th>FY</th>
<th>Q1</th>
<th>Money</th>
<th>People</th>
<th>Time</th>
<th>Assets</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
<th>Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal 1</td>
<td>Strategies</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Strategies</td>
<td>Strategies</td>
<td>Strategies</td>
<td>Q1: Q2: Q3: Q4:</td>
</tr>
<tr>
<td>Goal 2</td>
<td>Strategies</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Strategies</td>
<td>Strategies</td>
<td>Strategies</td>
<td>Q1: Q2: Q3: Q4:</td>
</tr>
<tr>
<td>Date</td>
<td>Action Item</td>
<td>Responsible Party</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>------------------------------------------------------------------------------</td>
<td>-------------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Distribute final Strategic Plan documents</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Meet to prioritize goals and introduce the quarterly goal planning process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Quarterly goal coaching sessions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1</td>
<td>Q1 goals emailed to those leading the Strategic Planning process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td>Q2 goals emailed to those leading the Strategic Planning process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1</td>
<td>Q1 goals review/Q2 goals discussion meeting</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3</td>
<td>Q3 goals emailed to those leading the Strategic Planning process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td>Q2 goals review/Q3 goals discussion meeting</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4</td>
<td>Q4 goals emailed to those leading the Strategic Planning process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3</td>
<td>Q3 goals review/Q4 goals and next year’s Fiscal Year annual planning meeting</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1</td>
<td>Q1 goals for next FY emailed to those leading the Strategic Planning process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4</td>
<td>Q4 goals review/Next Fiscal Year annual planning determined</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Free 30-minute consultation

Michelle West
hello@aprosae.com
719/425-9050
www.aprosae.com