

AmPhil

A GUIDE FOR NONPROFIT LEADERS:

The 4 Pillars of a Successful Strategic Plan



If you're going to fundraise successfully, you need a foolproof strategy.

THAT STRATEGY DOESN'T NEED TO BE BORN OF A THOUSAND MEETINGS OR SPAN A THOUSAND PAGES. IT SHOULD ARTICULATE YOUR END POINT, AND GIVE YOU THE ROADMAP FOR GETTING THERE.

You're not writing *War and Peace*. Your strategic plan should be clear, concise, and (ideally) not in russian.

Let's dig into how to create a strategic plan for your organization that will make your job as a fundraiser a whole lot easier.

Mission

THE FIRST STEP IN CREATING A STRATEGIC PLAN IS
RE-EXAMINING AND REINFORCING YOUR MISSION.

This might feel unnecessary—“Haven’t we established our mission already?”—but it’s the best way to dodge two threats: Mission Creep and Mission Loss.

Every mission-oriented organization is started by people who share a specific, defined mission. Over the years, though, the board, leadership, and new hires may all develop their own disparate conceptions of the mission. The mission starts to creep . . . and can eventually be lost entirely.

Revisit the organization’s stated mission, and refine it, if necessary. It should be short, memorable, inspirational, and reflect clear movement toward a goal. With an updated mission statement in hand, you can ensure that all plans support it.

Bonus Tip: Track the time you spend on work that directly fulfills the organization’s mission. Take note of how much time “extra,” non-missional work is soaking up.

Vision

3–5-YEAR PLANS GET A BAD RAP FOR BEING IMPOSSIBLE TO FOLLOW AND A WASTE OF TIME.

That's not quite fair. With a strong plan and a staff that's fully on board, your organization can absolutely achieve substantial goals in this timeframe. **To underpin your plan with a solid vision, you must answer two key questions:**

1. What's the point of this plan?
2. What difference does it make?

In other words, how will the plan further your mission or make a difference in your sector?

Individual leaders may have very different conceptions of the plan's purpose, so it's important to make the implicit explicit. Start by having key decision-makers write down why they think the organization exists. This may seem rudimentary, but it's a simple, effective way to expose differences and foster collaboration.

Values

**VALUES HAVE THE SAME PROBLEM AS MISSION:
OVER TIME, YOUR ORGANIZATION'S VALUES MAY CREEP.**

It's important to get your values down on paper. Otherwise, you run the risk that some values end up being overemphasized in the type of work your organization does and the staff it hires.

To ensure your 3–5-year plan succeeds, you need to ensure that your staff and priorities reflect a well-rounded vision for the future.

When starting the strategic planning process, list up to 20 non-negotiable values in bullet points. **You would rather the organization fail than stray from these tenets.** Ensure the tasks and priorities in the strategic playbook reflect these values.

Boulders & Bridges Analysis

This pillar will be a favorite of anyone who likes to spot and/ or solve problems.

DURING THE STRATEGIC PLANNING PROCESS, YOU NEED TO DETERMINE WHERE YOU'RE STARTING, WHERE YOU WANT TO GO, AND WHAT OBSTACLES YOU MIGHT ENCOUNTER.

We'll call these difficulties "boulders" that need to be removed from the path.

Once you've identified boulders, you can move on to building bridges—**the resources your organization needs to cover gaps in the road to success.** Those "bridges" might include new talent, systems, equipment, experience, and more.

In Conclusion . . .

With the support of these four pillars, you can build both a long-term strategy and an action plan. **The process shouldn't be considered complete until you've established clear tasks, accompanying metrics, and a person to own each step.**

TASK OWNERSHIP AND CLEAR DIRECTION WILL ENSURE THAT YOUR PLAN IS MORE LIKE AN ACTIVE AGENDA THAN A PONDEROUS TOME THAT JUST GATHERS DUST.



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