

The ROI of Strategic Planning: Preparing Your Team, Board and Stakeholders for Expansive Growth in 2024

Critical Data for Nonprofit Leaders



74% of leaders don't have faith their plans will succeed.
Source: Inc. Magazine



43% of nonprofit organizations developed new services & partnerships in 2021/22 to meet the shifting needs of their communities.
Source: 501c3 Services



The nonprofit sector is losing key employees – 19% per year vs 12% for the overall labor market.
The #1 reason given is burnout.



30% of current nonprofit employees surveyed report being burned out and 20% report they are in danger of burning out.
Sources: Opportunity Knocks and the Society for Human Resource Management.

The 5 Step Strategic Planning Framework that can Help You Beat the Odds

01 Engaging the Right People

- Get a 360-degree view on what is your current state.
- You are too close to it to see it clearly.
- Have a third trusted party talk to your stakeholders and get genuine feedback about your work.
- Stakeholders will see opportunities you do not.
- They will show you challenges you only had an inkling for.
- Include asking – who's not at the table?

02 Develop a Shared Vision & Values for the Future

A vision is a view of the future you want to create.

- It is not a business plan.
- It is not a to-do list.
- It can be relatively short-term or it can be over lifetimes (these are often the most powerful.)
- Vision requires responsibility and vulnerability;
- It requires you to be bold, authentic, and, most of all, focused.
- Not everyone will agree with you or want to be a part of it. That is okay.

Resources to You and Your Team Understand the Power of Vision:



2023: The Year of Vision



Creating a Company Vision



Vision is Greater than Sight

**STRATEGY 03:
SETTING STRATEGIC GOALS &
DEVELOPING ACTION PLANS**

- What is required now to make a dent toward the vision?
 - Hint: Answers often arise in the assessment of your current state (Strategy 1).
- Limit yourselves to 3 to 5 strategic goals. If everything is a priority, nothing is a priority!
- Involve the whole team in developing action plans/implementation strategies.
- They will not implement if they are not bought in, you set yourself up for sabotage.

**STRATEGY 04:
ROLL OUT AND EXECUTION**

- Here is where the real work begins and there are many ways to do it.
- Intentionally Educate Internal and External Stakeholders.
- Help your team/board/stakeholders see their role in the plan.

**STRATEGY 05:
SETTING STRATEGIC GOALS &
DEVELOPING ACTION PLANS**

- Consider ways to measure both community impact and revenue growth as you go.
- Intentionally ask, ‘what are we learning?’.
- In the Food Shuttle’s case they did not know the community impact they would have until they began to experiment with new ways of working.

Take this Assessment to understand how to improve your Strategic Planning efforts.



Executive Directors and senior staff are invited to join us tomorrow **Friday 11/3** for “Your Plan for Increased Revenue: Fundraising Strategies Unified behind Your Future Vision” from 7:15 – 8:15 am in the Hanes boardroom at the Marriott. Coffee and muffins provided. **Please RSVP to terib@higol.co or in person today. Seats are limited.**

Teri and her experienced team at HIGOL help nonprofit leaders increase revenue and community impact by an average of 50% within twelve months of working together. The team has over 200 combined years of experience in the nonprofit and entrepreneurial sectors. We support leaders every step of the way they unleash their organization’s true potential.

We’d love your feedback!

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