

**“They say that time changes things, but
you actually have to change them yourself.”
Andy Warhol**



Strategic Planning Outline

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Ultimately:
“The Answer to How is Yes”
Peter Block

STRATEGIC PLANNING

Definition

Strategic planning is a “disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the future.” *From Alliance for Nonprofit Management adapted from Bryson's Strategic Planning in Public and Nonprofit Organizations*

The difference between strategic and long range planning

In long range planning, the future is sufficiently reliable to develop a methodical plan of action. Strategic planning envisions a future that is dynamic and unpredictable. In our planning, we help you articulate your desired impact and create the flexibility to respond to a dynamic system.

What is “strategy?”

A strategy is a framework for making decisions based on a hypothesis that a certain pathway offers an advantage for acquiring some designated future outcome or gain.

C&E Strategic Planning Methodology

Our planning process is mission and data-driven and aligns with the framework in “[Delivering on the Promise of Nonprofits](#).” Your plan answers these questions:

- What community impact will you commit to? What is success over the life of the plan?
- What is the “theory of change” that underpins your actions and outlines the road to success?
- What capacity investments will achieve your desired community impact?
- How much will it cost and how will you generate the revenues you need?

Strategic Plan Contents

- Vision Story/Executive Summary
- How you serve your community
 - Mission
 - Values
 - Situation analysis
 - Theory of change/logic model
 - Impact and outcomes
 - Strategic program priorities
- Operations Plan
 - Core strategies
 - Capacity investments
 - Budget and revenue forecast
 - Board/governance objectives
- First year work plan outline
- Appendices
 - Planning process and participants
 - Internal scan summary
 - Summary of external feedback
 - Relevant data

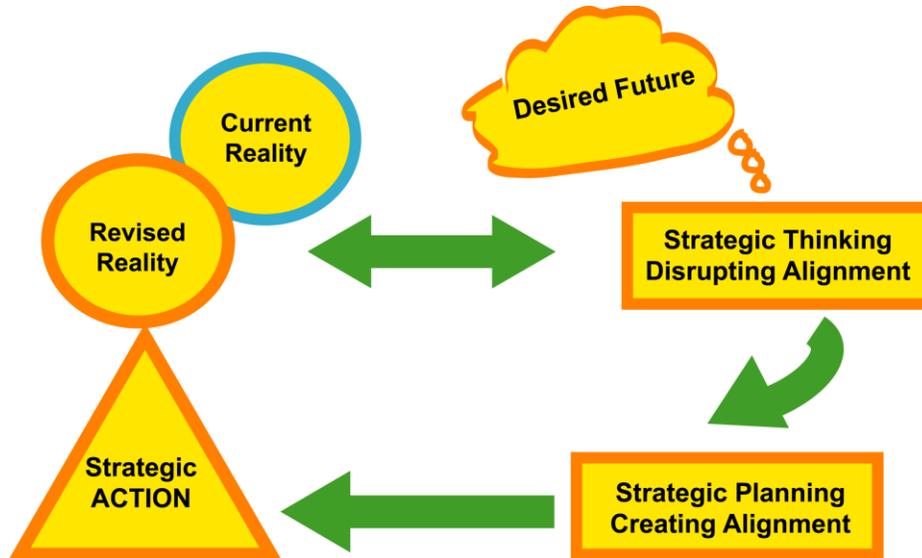
C&E planning process

- Confirm process & people
- Identify starting assumptions -survey
- Undertake research – interviews and data
- Digest and analyze
- Strategize
- Develop recommendations
- Make preliminary decisions
- Consult the community
- Make final decisions
- Initiate plan for implementation



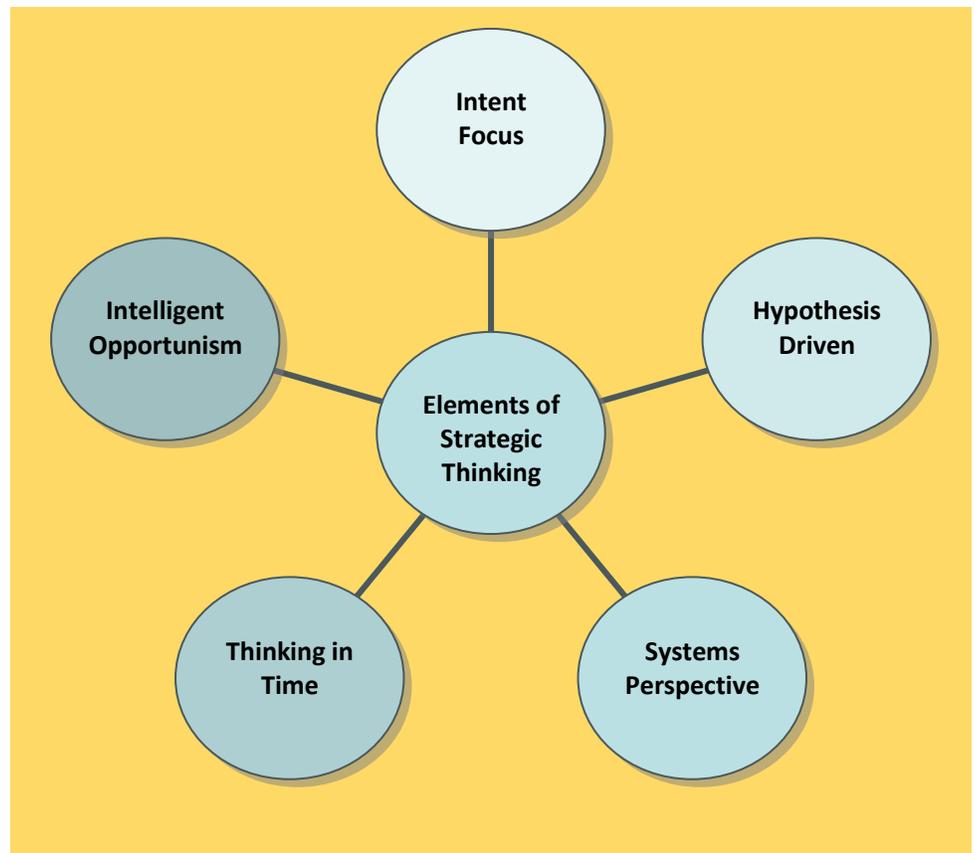
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Strategic Action is the intended result of strategic planning



Strategic Thinking is essential to strategic planning.

It includes the five elements in the diagram to the right which were identified by Jeanne M. Liedtka, professor of business administration at University of Virginia's Darden Graduate School of Business. Her current research focuses on designed innovation in the government and social sectors.





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Strategic planning is not

- An attempt to make future decisions. All decisions have to be made in the present.
- Linear & fixed

For strategic planning to be effective, you need:

- A compelling vision of change
- The way
- The will
- Leadership to execute
- Courage
- Flexibility

To make decisions stick, you need to

- Achieve the highest degree of support
- Put all assumptions on the table
- Define your desired outcomes
- Focus on interest, not positions
- Push training and action deep into the organization
- Align people with the plan

Follow strategic planning with business or operations plans

- Create sub-plans and logic models for all of your business units.
- Identify tactics, outputs and the timeline for implementation.
- Establish key indicators & measures – so that you’ll know if you are reaching your objectives