

Strategic Planning

QuickStart Kit



Get ready to get results!

- ✓ Align Your Team
- ✓ Clarify Your Vision
- ✓ Grow Your Impact





Who We Serve

- ✓ Nonprofit Organizations
- ✓ Business Leaders
- ✓ Nonprofit Consultants

"The Funding for Good team has a remarkable talent for steering the strategic planning process in such a supportive and streamlined way that the results seem almost magical!"

Michelle Morgan, Executive Director
Women's Resource Center

Meet Funding for Good

fundingforgood.org

At Funding for Good, we're a "sleeves rolled up" kind of team.

For two decades, Funding for Good has been helping mission-driven nonprofits, consultants, and businesses build sustainability and impact.

When leaders find themselves at a crossroads, we're the team they call.

Clear goals. Proven strategies. Actionable work plans. It's our recipe for success.

We're here for your mission.

FACT: One of the most basic responsibilities of a governing board is to secure the future of the organization through the creation and implementation of a current and relevant strategic plan.

The First 5 Steps in Strategic Planning

Use the Q & A exercise below to determine your organization's strategic planning readiness.



Has your organization ever completed a strategic plan?

Yes

No

If Yes... When was it completed and when does it end?

Who facilitated the process?

Who participated in the process?

Was the plan successful? If the goals and objectives weren't met, why not?



Do you have a current vision and mission statement?

Yes

No

If YES... take our quiz on page [jump to page 3](#) to see if your vision and mission are doing their jobs.

If NO... [jump to page 5](#) and schedule a visioning session with your board, staff, and key stakeholders.



Does your board have big dreams for the organization's future?

Yes

No

If YES... it's time to develop a plan so those dreams can become a reality!

If NO... it's time to schedule intentional conversations to inform, inspire, and mobilize the board.



Do you have key benchmark data about your organization's impact?

Yes

No

If YES... determine which metrics should be considered for future planning and share those with your leadership team.

If NO... work with your leadership team to determine what data to gather to set a baseline that describes your organization's current reality.



Are your leaders committed to actively participating in the planning process?

Yes

No

**Two full days is a reasonable expectation.*

If YES... [jump to page 7](#) to learn about strategic planning models and how to choose the right consultant for your needs.

If NO... [jump to page 5](#) to start building buy-in with your board and staff today.



CHECK-IN

Are Your Vision and Mission Statements Stellar?

Your strategic plan should be grounded in your organization's vision and mission. But that means you need a STELLAR vision and mission statement—which most organizations don't have. That's why Funding for Good starts every strategic planning process with a visioning session.

Quiz

Are you ready to see how your organization stacks up?

Do you have a stellar vision and mission statement?	YES	NO
Q1 Can your board and staff quote both statements verbatim by memory?	<input type="checkbox"/>	<input type="checkbox"/>
Q2 Does your board/staff always "rephrase" the vision/mission statements?	<input type="checkbox"/>	<input type="checkbox"/>
Q3 If a stranger asks you WHY your organization exists , could you respond using only your vision statement as written?	<input type="checkbox"/>	<input type="checkbox"/>
Q4 If a stranger asks WHAT your organization does , could you respond using only your mission statement ?	<input type="checkbox"/>	<input type="checkbox"/>
Q5 If you share your vision and/or mission statement with a stranger, does it inspire them to say, "Wow... tell me more!" rather than giving you a confused look and asking, "Ok, but what exactly do you mean?"	<input type="checkbox"/>	<input type="checkbox"/>

If you answered "no" to any of the above, it's time to freshen up your vision and mission statements.

STEP 1 Understand the difference between vision and mission statements.

STEP 2 Schedule a visioning session with your board and staff leadership to craft the kind of vision and mission statements that turn strangers into supporters.

Vision vs. Mission Statement

Do you know the difference?

	Vision	Mission
Purpose	Describes WHERE you want to be in the future.	Describes HOW you will get to where you want to be.
Question it answers...	What is your desired end state? What will the future look like if you fulfill your mission?	What does your organization do?
Time Factor	Where you want to be in the FUTURE .	What you do in the PRESENT .
Length	A snapshot of your desired future. It can be longer than a mission statement.	Brief statement. It should pass the "T-shirt" test, meaning, it should be able to be printed on a t-shirt and still be readable.
Purpose	To inspire	To inform
Effect	To challenge	To clarify
Key Components	Words to generate hope for a brighter future and clarify core values of the organization.	Who is your target audience? What service and/or commitment does your organization have to them?
Distinguishing Features	Expresses your optimal goal and reason for existence.	Provides an overview of your organization's plans and approach.
Change	Vision statements should not be changed drastically because this "desired result" is essentially the foundation of the organization. It is the "WHY" behind your organization which means any changes should be very carefully considered.	Mission statements should be evaluated regularly and can be modified to adapt to changes in community needs and circumstances. It should only be changed if strategies or services need to be changed to achieve your vision.

Sample Vision Statement: Charity water believes that we can end the water crisis in our lifetime by ensuring that every person on the planet has access to life's most basic need—clean drinking water.

Sample Mission Statement: Charity Water is a non-profit organization bringing clean and safe drinking water to people in developing nations.



ASSIGNMENT

Visioning Session Exercise

Your visioning session should include board and staff leadership, along with any other key stakeholders who may bring needed insight.

Before your visioning session, ask participants to complete this simple homework assignment.

Conduct an online search for the best or most impactful vision or mission statements. Look at vision and mission statements from both for-profit businesses and nonprofit organizations. Each participant should select two samples that resonate with them and take a moment to evaluate what about the content, framing, or writing made these statements shine.

This simple prep work can spur creative thinking in your visioning session—and remind your team that short and simple is the most effective approach to messaging.

When crafting your vision and mission statements, Funding for Good encourages nonprofits to use a messaging criterion we call the “Three Cs.” Your message should be:

 CLEAR

 CONCISE

 COMPELLING

Once you have new vision and mission statements drafted, consider taking the top two or three options for a test drive! Request feedback from clients, stakeholders, or strangers to determine which message resonates most with your community.

When to hire a Facilitator

If you're looking for inspiring results, consider hiring a facilitator for your visioning session.

A facilitator can encourage creativity while keeping your team on track. They can also help you find just the right words to make your vision and mission statements sing.

If you're looking for someone to facilitate your visioning session, schedule an exploratory call with Funding for Good to learn how we can help.

Power Move Align Your Team and Build Buy-In Starting TODAY



*Organizations invest millions every year in launching workplace initiatives to improve engagement and culture, only to meet resistance or watch them fizzle out before they ever gain momentum.*¹

Have you ever designed an amazing initiative and set out to get your team on board, only to see the effort fall flat? If so, you're not alone.

What often distinguishes a successful initiative from a failed one is the level of buy-in it achieves among staff, board, and other stakeholders.

Being informed vs being engaged

One mistake that leaders often make is confusing information-sharing with building buy-in. We figure that an idea or initiative will be so inspiring, that just learning about it will engage our teams.

But from the perspective of staff or other stakeholders, **being informed is a passive activity**. And even if our staff and board think the idea is great, they have a million other competing priorities—including the ones they'll get reviewed on at the end of the year. **Buy-in happens with active engagement.**

Which is why Funding for Good recommends taking steps to build buy-in BEFORE a planning or strategy process even starts.

How to start building buy-in for your strategic plan TODAY

- Use our [Pre-Strategic Planning Checklist](#) as a tool to get board and staff invested from day one. Gathering key data helps people understand and care about the process.
- Engage employees early on, such as through [surveys](#), [interviews](#), and focus groups.
- Carve out ongoing opportunities for staff to be involved in specific elements of the planning process, such as providing insights for your [SWOT analysis](#).
- Include strategic employee representation on your planning committee and planning retreat, right alongside your board and staff leadership.
- Regularly reflect back to staff how their input and participation is informing your new strategic plan and planning process.

¹ Christopher Littlefield, "Global Talent Expert Shares 5 Ways to Generate Excitement Around Your New Workplace Initiative," *Forbes*, January 2023.

Strategic Planning Models

Cheat Sheet

Once you're ready to start your strategic planning process, it's time to think about different planning models and hiring a consultant.

Luckily, if you're going to be working with a strategic planning consultant, you don't need to understand the pros and cons of every single model (there are upwards of 20 different approaches!). But it's still worth taking the time to become familiar with terms you may hear.

TOOLS AND MODELS DESIGNED FOR SPECIFIC CHALLENGES

Some approaches start with identifying and understanding internal and/or external challenges. SWOT analysis and OKRs tools are often combined with other planning models.

..... *For example*

Scenario Planning: Especially valuable when an organization is facing new and unexpected external changes—as happened to businesses and nonprofits during the early days of the COVID-19 pandemic.

SWOT Analysis: Guides your organization to quickly assess internal and external Strengths, Weaknesses, Opportunities and Threats. Related are environmental scans and PESTLE analysis.

Real-time Model: Helps organizations navigate through immediate challenges in real-time.

Theory of Constraints: Identifies the biggest "bottlenecks" holding your organization back from achieving its goals and how to fix them.

Blue Ocean Strategy: Helps businesses identify and create new markets (rather than compete in crowded markets).

OKRs: Objectives and Key Results (OKRs) provide concrete metrics to evaluate progress toward long-term goals on an ongoing basis—an important part of implementing your strategic plan.

MODELS THAT DETERMINE THE PLANNING PROCESS

Several strategic planning models lay out a clear and distinct planning process.

..... *For example*

Classic Model: Also called the basic or simple model, this method lays out five clear steps, starting with refining your mission statement.

Issue-Based Model: Also called a goal-based model, this approach builds on the classic model by adding in tools like an environmental scan or SWOT analysis.

Alignment Model: Adds a deeper focus on internal operations.

Inspirational Model: Starts with envisioning the future you want to achieve.

Balanced Scorecard: A structured format to help businesses set goals beyond profits.

Porter's Five Forces: Helps businesses assess the "five factors" that influence the profitability of products and services.

Strategic Planning Models (continued)

Cheat Sheet

MODELS THAT GUIDE STAKEHOLDER ENGAGEMENT

One of the key benefits of strategic planning is the opportunity to build consensus across organizational stakeholders. Strategic planning models that are explicit about stakeholder participation include:

For example

Theory of Participation Model: The Theory of Participation (or TOP) model of strategic planning is premised on the idea that facilitating authentic participation from people who are going to be involved in executing a plan will build buy-in and better long-term results. This is critical, as one of the top reasons Funding for Good sees strategic plans fail is because the right people weren't part of the planning process.

Hoshin Planning: Starts with top-down strategy development but adds an intentional process of feedback and iteration to get all levels of an organization onboard.

Organic Planning Model: Also called the self-organizing model, this is a looser and more communal approach to strategic planning.

The Role of a Strategic Planning Consultant

and how to choose the right one

When you decide to create a strategic plan for your organization, it's tempting to consider a DIY process. After all, there are plenty of templates and apps online. Plus, hiring a consultant costs money and many businesses and nonprofits are operating on tight budgets. If your organization already creates annual goals, then how different is drafting a 3-5-year strategic plan?

But the reality is that strategic planning isn't a product, it's a process.

You're not hiring a strategic planning consultant to write a document. You're hiring a strategic planning consultant to facilitate a process that will get you the best possible results in the most efficient and effective way possible.

What exactly does a strategic planning consultant do?

A strategic planning consultant oversees an organization's strategic planning process, manages stakeholder participation and ensures successful execution. This typically includes developing a work plan and timeline, assisting with stakeholder feedback processes, facilitating strategic planning sessions or retreats, facilitating consensus building, and preparing a final written strategic plan.

A consultant may also provide support for strategic plan implementation. This could include an overarching implementation plan and individual plans by department.



Five benefits of hiring a strategic planning consultant:

<p>Save Time</p> <p>Would you rather your leadership team focus on coordinating logistics and drafting meeting agendas—or on honing an inspiring and achievable strategy for the future?</p>	<p>Save Money</p> <p>Wasted time costs your organization money—especially when it comes to your leadership team, who are generally among your highest-paid staff.</p>	<p>Build Authentic Consensus</p> <p>True consensus isn't just getting people to agree (which is what might happen <u>if your CEO is running the planning process</u>). It's about skillfully guiding a team to grapple with challenges and co-create a path forward together.</p>	<p>Strengthen Internal Alignment</p> <p>If your strategic plan is going to succeed, you need your stakeholders on the same page. A neutral party—like a consultant—gets you there faster.</p>	<p>Benefit from Priceless Expertise</p> <p>Benefit from your consultant's years of expertise with organizations like yours, knowledge of best practices, and expert facilitation.</p>
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10 Questions to Ask a Strategic Planning Consulting Firm

As you meet with potential strategic planning consultants, you'll want to ask key questions to probe below the surface. Here are the top 10 questions we recommend asking:

- Q1** How will you tailor the strategic planning process for our organization?
- Q2** How many organizations in my sector (and/or size, growth stage, etc.) have you worked with before? What are some of the lessons you've learned from that work and the best practices you've created?
- Q3** How would you describe your facilitation style?
- Q4** How do you approach building consensus?
- Q5** How do you help clients navigate conflicts?
- Q6** What do we, as organizational leaders, need to do to be successful in our strategic planning process?
- Q7** What are the most common challenges you've seen organizations struggle with during the strategic planning process?
- Q8** If you encounter strategic issues outside of your expertise, how will you handle that?
- Q9** Once the strategic plan is ready, what support will be available for implementation? If needed, do you provide add-on services for the implementation process?
- Q10** How often do you recommend that we consult our strategic plan? Under what conditions should it be updated or revised?

TIPS

How to Write a Strategic Planning RFP

By writing a strategic planning RFP with your leadership team, you can start creating alignment from the get-go. To attract the right consultant for your organization, your RFP needs to include several key elements.

Top RFP Tips

- Keep your RFP clear and brief—it's your first impression to consultants.
- Be flexible in the materials requested. Consider informal expressions of interest followed by interviews and proposals, instead of requesting lengthy documents.
- Seek out interviews with consultants and use your RFP as an introduction. Not all consultants respond to RFPs, as it can cost them time and money. Intensive RFP-only processes can constrain the diversity of your consulting pool.
- Be sure your consultant pool is diverse—and consider seeking out women- and minority-owned businesses.



- 1) **Introduction and Summary.** In 2-4 paragraphs, summarize what you're seeking (a strategic planning consultant), why, and what you hope to accomplish. Don't be afraid to let your organization's personality shine here. If your culture is very serious, buttoned up, and structured, that's how you'll want your RFP to be too. If you place a premium on creativity and playfulness, let that come out in your writing style.
- 2) **Organization Background.** In 2-3 paragraphs, provide basic information about your organization, including vision and mission, size, sector, how long you've been operating, etc. You probably already have this information available on your website, grant proposals, annual reports, or other materials.
- 3) **Project Scope or "Who Are We Looking For?"**. Here at Funding for Good, we recently saw an organization's RFP that included a section called: "Who are we looking for?" This described the organization's values, how they envisioned working with a consultant, the type of experience they hoped a consultant would bring, and details about the project scope. This approach is a great way to keep the focus on what you're seeking from a consultant, rather than dictating a list of tasks.
- 4) **Timeline.** If you have a set timeline in mind for your planning process (such as start date and completion date), include that here.
- 5) **Application and Selection Process.** Being clear about the application and selection process helps both organizations and applicants—and is important for building a diverse consultant pool. Be sure to describe what you're looking for in RFP responses. We recommend keeping this brief—more of an expression of interest rather than a full-blown proposal.

The Top 5 Reasons Strategic Plans Fail *and How to Make Sure Yours Succeeds*

67%

of strategic plans fail. [\(Inc.\)](#)

95%

of employees don't understand their company's strategy. [\(HBR\)](#)

48%

of all organizations fail to meet at least half of their strategic targets. [\(Bridges\)](#)

When you realize how many strategic plans and initiatives fail, it can feel daunting. But understanding WHY this happens is the first step to ensuring your plan succeeds.

Why Strategic Plans Fail

- 1) **Leaders commit to drafting a one-time strategic plan versus engaging in ongoing strategic thinking.** Your plan should be the starting point for your strategy work—not the end!
- 2) **Facilitators prompt planning processes from the present to future—rather than starting with a clear, shared vision.** Your most relevant question isn't "Where are we going?" but rather "Where do we want to BE in 3-5 years?"
- 3) **Participants focus on WHAT they plan to do and fail to focus on HOW.** To achieve success, you need to first define what success looks like.
- 4) **Teams fail to achieve consensus or build buy-in.** When the board, staff, and stakeholders cannot agree on shared priorities, a strategic plan tends to become a point of contention instead of a helpful roadmap.
- 5) **Organizations refuse to follow through.** When challenges arise during implementation, leaders are often quicker to change or remove goals than to implement accountability processes.

How You Can Plan for Success!

- 1) **Commit to an intentional process**—and to using your strategic plan as a tool for strategic decision-making.
- 2) **Prioritize building buy-in** and gathering stakeholder feedback before the planning even begins. This includes investing in stakeholder engagement, from [surveys](#) to [interviews](#) to spots on your planning committee.
- 3) **Capture a shared, practical vision.** Goals are great, but they are even more inspiring when expressed in the context of a greater vision.
- 4) **Define success indicators**—so you can measure your progress and adapt your strategies in real-time.
- 5) **Bridge the gap between producing strategies and executing them.** Strategic plans should be LIVING documents —which means they should evolve alongside your organization.

“For successful implementation, aim to review your strategic plan and assess progress quarterly with your board and staff leadership.”

Ready to align your team around a powerful vision for the future?

Finding the right strategic planning consultant starts now

One of the biggest decisions you'll make in your next strategic planning process is hiring a consultant. While some leaders try to go it alone, hiring a consultant ultimately saves you time and money, while delivering better results. The key is finding the right consultant for your organization.

To see if Funding for Good's approach is a good fit for organization, [reserve your free strategic planning consult today](#).

15-Minute FREE Strategic Planning Consult

Take the next step in building an aligned, impactful, and successful organization by booking a free strategic planning consult with Funding for Good.



[Book Now](#)

