

Hoexter Executive Consulting

Yale Alumni Nonprofit Alliance Roundtable
21st Century Strategic Planning for Nonprofits
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What is Strategic Planning?

Strategy: A coordinated set of actions aimed at creating and sustaining a competitive advantage in carrying out the nonprofit mission.¹

Strategic planning is the process of determining 1) what your organization intends to accomplish and 2) how you will direct the organization and its resources toward accomplishing these goals over the coming months and years.²

What Are the Steps Involved in Strategic Planning?

1. Articulate organizational identity
 - a. Business model
 - b. Market awareness
 - c. Competitive advantage
2. Create a strategy screen
3. Frame a Big Question or Questions. What are your biggest current strategic challenges?
4. Develop and test strategies in response to the Big Question(s)
5. Implement strategies and adapt continuously

What about the Plan Document?

1. Mission
2. History and Future Plans
3. Goals and Strategies
4. Implementation Plan
5. Pro forma Financials

¹ David La Piana: *The Nonprofit Strategy Revolution: Real Time Strategic Planning in a Rapid-Response World* (New York, NY: Fieldstone Alliance, 2008), p. 31

² Bryan W. Barry: *Strategic Planning Workbook for Nonprofit Organizations* (St. Paul, MN: Fieldstone Alliance, 1997), p. 5.