



STRAT
Labs

Strategic Planning: **DIY GUIDE**



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INTRODUCTION

Ready to take control of your nonprofit's future? You know your mission, vision, and goals better than anyone else—so why hand over the reins to expensive consultants? With the right tools, your team has everything it takes to create a strategic plan that truly reflects your unique needs.

This DIY eBook is your roadmap to success. Packed with practical advice and customizable tools, it's designed for Executive Directors, Board Members, and nonprofit leaders ready to take action. Say goodbye to one-size-fits-all solutions and hello to a plan that drives real impact for your organization.

Upon completion of this eBook, you will have the knowledge to:

- 1. Understand Strategic Planning:** Gain a clear understanding of what strategic planning is, why it's essential for nonprofits, and when it's time to start the process.
- 2. Engage Key Stakeholders:** Learn how to involve the right people in your planning sessions, including staff, board members, funders, and volunteers, to maximize input and collaboration.
- 3. Set Actionable Goals:** Discover how to define measurable goals, prioritize initiatives, and create a roadmap for success that aligns with your nonprofit's mission and values.
- 4. Facilitate Productive Sessions:** Master the art of hosting effective in-person or virtual strategic planning sessions, complete with activities and tools that keep everyone engaged.
- 5. Develop a Comprehensive Plan:** From SWOT analysis to setting strategic pillars, you'll learn how to draft a strategic plan that provides clarity and direction for your team.
- 6. Ensure Long-Term Success:** Get tips on how to track progress, measure success with KPIs, and adapt your plan as your organization grows.

Let's dive in and start planning for success!

What is Strategic Planning?

Strategic planning is your nonprofit's secret weapon, turning big dreams into a clear, actionable roadmap. It helps you focus on where you're going, how you'll get there, and how to measure your success. In other words, it answers the big questions:

- **Where are we headed?**
- **What's the game plan?**
- **How do we know we're winning?**

A solid strategic plan brings everyone together, keeps the focus sharp, and helps you track progress every step of the way. This module will help you dream big, prioritize what matters, and set goals you can actually crush. Let's turn your vision into reality!

Signs It's Time for Strategic Planning

Recognizing when it's time for a strategic refresh is crucial for keeping your nonprofit aligned with its mission and ready for growth. The following indicators serve as key signals that it's time to take a step back, reassess your approach, and fine-tune your strategy. By staying proactive and aware of these signs, you can ensure that your efforts are always focused, efficient, and positioned for long-term success.

- **New Leadership:** Changes at the board or executive level often necessitate a review of existing strategies to ensure continuity or introduce fresh perspectives.
- **New Competitors:** As new nonprofits or social enterprises enter the space, it's crucial to reassess your organization's mission and identify differentiators.
- **Financial Shifts:** Whether dealing with increased revenue or budget cuts, planning allows the organization to pivot and maintain its effectiveness.
- **Stagnation:** If programs and events seem to plateau without growth, strategic planning can rejuvenate efforts.
- **Lack of Prioritization:** Teams often have innovative ideas, but without clear direction, many don't take off. Strategic planning helps prioritize efforts and create actionable steps.
- **Growth Needs:** Organizations looking to expand their budget or launch a major fundraising campaign need structured planning.
- **Board Engagement:** Effective strategic planning also creates deeper engagement with board members and stakeholders, making them more invested in the organization's success.

Why Strategic Planning is Important

Strategic planning energizes your team and fosters unity. According to a Harvard Business Review study, 95% of employees don't fully understand their organization's strategy. That's where strategic planning steps in to make a real difference.

Key benefits include:

- Clear alignment between long-term goals and day-to-day efforts.
- Measurable goals to track progress and adjust as needed.
- A shared sense of direction, driving motivation and engagement.

When everyone understands the mission and the path to achieving it, they can work together more effectively, bringing your nonprofit closer to its goals.

Expected Outcomes of Strategic Planning

Strategic planning isn't just a buzzword—it's the blueprint that defines your organization's every move. It's about knowing exactly who you serve, why you do what you do, and how to dominate your future. This is your chance to stop reacting and start leading with purpose, setting the stage for success that's not just planned, but inevitable. So what should you be walking away with to ensure it was as meaningful as possible?

Key benefits include:

- **A strategic plan or outline:** A document that lays out goals, objectives, actions, and a fundraising roadmap.
- **Board and stakeholder engagement:** By involving key players in the process, you build a deeper commitment to organizational goals.
- **Prioritized focus:** Through collaborative conversations, teams focus on the most impactful goals, ensuring all energies are aligned toward common outcomes.

Strategic Planning Logistics

Who Should Be Involved?

The success of your strategic planning session hinges on the people at the table. You want a dynamic mix of voices that can challenge assumptions and spark fresh ideas. But don't go overboard – a smaller, focused group will help keep the conversation productive and make sure all perspectives are heard. Aim for diversity in experience, roles, and viewpoints to ensure you're setting a path that reflects the whole organization.

Potential participants include:

- **Staff** who will implement the plan.
- **Volunteers** and **community members** who have close ties to your organization.
- **Board members** are responsible for governance and fundraising.
- **Funders** who understand your challenges and offer insights.
- **Corporate partners** who can offer business insights and open doors to new networks.
- **Major donors** who are deeply connected to your mission.
 - **TIP:** This can also lead to a stronger sense of ownership, commitment, and trust to build those relationships!

Get the right balance in your planning group – large enough to bring in diverse perspectives, but small enough to keep discussions focused and meaningful. The key is ensuring that everyone at the table is fully invested in setting measurable outcomes and committed to revisiting the strategy as needed. Regular check-ins will keep your plan on track and aligned with your organization's evolving needs.

Goals of the Session

Setting clear goals at the start of your strategic planning session is essential. These goals should serve as a roadmap, guiding discussions and ensuring that everyone stays focused on what really matters. Think of them as your session's North Star – providing direction, keeping participants engaged, and ensuring that the outcomes are both actionable and aligned with your organization's long-term vision. With strong goals in place, you create a framework for productive conversations that drive meaningful results.

Key session goals could include:

- Defining organizational **vision** and **mission**.
- Identifying **desired outcomes** and success markers.
- Assigning **accountability** for tasks.
- Establishing **KPIs** (Key Performance Indicators) to track progress.

Examples:

- **For a brand-focused session:** Define your mission, outcomes, and KPIs related to brand growth.
- **For fundraising:** Audit existing programs, identify new fundraising methods, and outline goals for revenue and participation.

How to Host: In-Person or Virtual?

While in-person sessions often encourage the highest level of engagement, many organizations have embraced virtual platforms like [Zoom](#) for strategic planning. Virtual tools such as breakout rooms and polls can make remote sessions just as interactive.

Tips for hosting virtual strategic planning sessions:

- Use polls to gather real-time feedback.
- Leverage breakout rooms for small group discussions.
- Encourage engagement with video and chat participation.

Conducting the Strategic Session

Determining Topics

When it comes to strategic planning for nonprofits, starting with a clear analysis of where you are is key. Many organizations use a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis to take an honest look at their current state. There are other frameworks just as useful like SOAR, PESTEL, and MOST analysis frameworks. These exercises help pinpoint the areas that need attention, while also identifying your greatest strengths and untapped opportunities. By preparing this in advance, you create more room for rich discussions and valuable feedback during your session.

Here are some example topics to consider during your strategic planning session:

- **Where are we now?** Assess where your organization stands and how far you've come.
- **What decisions brought us here?** Reflect on the choices made along the way and their impact.
- **What do we want the future to look like?** Paint a picture of the success you envision.
- **How do we reach that future?** Break down the actionable steps needed to get there.
- **What resources do we need?** Identify the tools, people, and partnerships required to bring your plan to life.

These topics shape the conversation and create a shared sense of purpose. In the nonprofit world, where resources can be limited, this kind of focused and meaningful planning is exactly what helps turn vision into IMPACT.

Activities for Engagement

Strategic planning doesn't need to be dry. Use engaging activities to stimulate creativity and brainstorming.

Our two favorite activities that encourage big-picture thinking and align your team on the organization's future are **Prune the Tree** and **Write the Headline**.

1. PRUNE THE TREE:

Objective: Define the current state of the nonprofit, set future goals, and collaboratively identify strategies to eliminate unnecessary or unproductive activities, making way for meaningful growth.

Materials Needed:

- Large tree diagram (can be drawn on a whiteboard or on a poster)
- Sticky notes (in at least two colors)
- Markers
- Timer

Steps:

1. Prepare the Tree Diagram:

- Draw a large tree on the board/poster.
- Label three main areas:
 - **Roots:** Represent the nonprofit's current foundation (mission, core values, programs, key resources).
 - **Trunk:** Represents the organization's current state (major activities, challenges, strengths).
 - **Branches/Leaves:** Represent future goals and growth opportunities (vision, long-term impact, new initiatives).

2. Define the Current State (Roots & Trunk):

Time: 15 minutes

- Using one color of sticky notes, ask participants to write down key aspects of the nonprofit's current operations and place them in the roots section of the tree.
 - Examples: "Strong community relationships," "Limited funding for outreach," or "Established programs in adaptive sports."
- In the **trunk** section, have participants place sticky notes about the organization's current state and challenges, including operations and performance.
 - Examples: "Understaffed in admin roles," or "High volunteer turnover."

3. Set Future Goals (Branches & Leaves):

Time: 15 minutes

- Using a different color of sticky notes, ask participants to write the nonprofit's future goals and aspirations. These notes will go on the **branches**.
 - Examples: "Expand services to new locations," or "Double the impact by 2025."
- In the **leaves** section, participants can place specific actions or potential projects that will help achieve these goals.
 - Examples: "Secure 10 new corporate sponsors," or "Develop a digital marketing campaign."

4. Prune the Tree (Shaping Growth):

Time: 15 minutes

- Review all sticky notes on the tree.
- As a group, identify strategies to eliminate or adjust activities that don't support the future vision. Participants will use markers or colored sticky notes to "prune" or remove aspects that hinder growth or are no longer relevant.
 - Example: "Reduce reliance on one-time event fundraisers."
- For each identified area that needs pruning, the group should suggest alternatives or refinements that will support long-term growth and sustainability.
 - Example: "Shift focus to long-term corporate partnerships."

5. Review & Discuss: Time: 10 minutes

- Once the tree is pruned, discuss the final outcomes:
 - What are the critical roots that need to be strengthened?
 - How can current challenges (trunk) be overcome?
 - Which goals and branches will the organization focus on growing?

6. Finalize Action Plan:

Time: 5 minutes

- Summarize the insights from the pruning exercise and create an action plan based on the group's feedback.
 - Identify 3-5 key strategies that emerged and assign ownership to team members or partners to drive them forward.

2. WRITE THE HEADLINE

Objective: Craft a visionary headline about your organization's success five years from now, helping participants articulate a bold and inspiring vision for the future. This activity fosters creativity and forward thinking, encouraging the group to align on long-term goals.

Materials Needed:

- Notebooks or sheets of paper
 - Pens, pencils, or markers
 - Timer
 - Pre-prepared prompt sheet for headline criteria (optional)
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Steps:

• Introduce the Activity & Set the Scene:

Time: 5 minutes

- Explain to the group that they will imagine a newspaper or media outlet is writing about the organization five years into the future. The task is to come up with a bold, captivating headline that reflects a major success or achievement of the nonprofit.
- The headline should capture an ideal future state and paint a picture of significant impact and transformation. It can be about anything: an expansion of services, groundbreaking partnerships, or societal change driven by the nonprofit's work.

Prompt participants with the following headline elements:

- **Who** is the subject of the story (your organization or the beneficiaries)?
- **What** is the major achievement (new milestone, societal impact, growth)?
- **Where** is the impact happening (local, national, or global)?
- **When** did this success happen (five years into the future)?
- **Why** is it significant (how does it demonstrate the organization's purpose)?
- **Which** news or media outlet is publishing this story?

Optionally, provide a handout or display these criteria for reference.

• Brainstorming the Headlines:

Time: 10 minutes

- Depending on your group size, you can divide participants into small groups (3-5 people per group) or encourage them to work as individuals.
- Ask each individual or group to draft 2-3 headlines that they feel captures an inspiring success story for the nonprofit in five years.

Example Headlines:

- "Nonprofit X Transforms 100,000 Lives with New Nationwide Program for Youth Empowerment!"
- "From Local to Global: Nonprofit X Expands Impact to 10 Countries, Changing the Future of Education."
- "Thanks to Nonprofit X, Homelessness Drops by 50% Across the City!"

Instructions for Brainstorming:

- Encourage creativity! Headlines should be bold, aspirational, and capture the essence of a significant victory or breakthrough.
- Encourage teams to focus on impact and outcomes that align with the organization's mission.

3. HEADLINE REFINEMENT & SELECTION:

Time: 10 minutes

- After brainstorming, ask each individual or group to share their headline(s) with the larger group.
- Encourage them to refine their headline before presenting it, ensuring it's compelling, specific, and impactful.

Questions to help refine the headline:

- Is the headline clear and concise?
 - Does it convey a significant achievement?
 - Will it grab attention and inspire readers?
 - Does it align with the organization's vision and mission?
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4. GROUP PRESENTATIONS & FEEDBACK:

Time: 15 minutes

- Have each group present their headline to the entire team.
 - After each presentation, the larger group can provide feedback on the headline:
 - Is it bold and inspiring?
 - Does it reflect where the organization aspires to be in five years?
 - Are there any suggestions to make it even more compelling?
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5. VOTING ON THE MOST INSPIRING HEADLINE:

Time: 5 minutes

- Once all headlines have been presented, allow the group to vote on the headline they feel best represents the future success of the organization.
 - Use sticky notes, hand raises, or an anonymous ballot system for the voting process.
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6. REFLECTION & DISCUSSION:

Time: 10 minutes

- After voting, facilitate a group discussion on the selected headline:
 - How does this headline reflect the organization's long-term vision?
 - What steps can the organization take to make this vision a reality?
 - How does this headline align with strategic goals or inspire future planning?

Discussion Prompts:

- “What key actions or decisions need to be made today to achieve this headline?”
 - “What challenges might arise along the way, and how can we overcome them?”
 - “What resources (internal/external) will be critical to achieving this future success?”
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7. CLOSING:

Time: 5 minutes

- Wrap up by highlighting that this bold headline serves as a guiding star for the organization's future. Encourage team members to think about how their individual roles contribute to realizing this shared vision.
 - Conclude by reinforcing the importance of strategic actions, partnerships, and resilience in making this headline a reality.
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Creating the Agenda

Set aside 8 hours spread across 2-3 days for strategic planning. Use the time to review, brainstorm, and finalize strategic pillars.

Sample Day 1 Agenda:

- Welcome and Introductions (15 mins)
- SWOT Analysis Presentation (30 mins)
- Executive Director Report (30 mins)
- **Activity #1:** Prune the Tree (60 mins)
- Break (15 mins)
- **Activity #2:** Write the Headline (60 mins)
- Identify Strategic Pillars (90 mins)
- Wrap-up & Next Steps (15 mins)

Developing the Strategic Plan

From Vision to Execution

Now that you have laid a solid foundation and gathered insights, it's time to pull everything together into a cohesive strategic plan that will guide your organization moving forward.

This final strategic plan will help ensure that the organization's goals and mission remain aligned as you implement the discussed strategies.

Key Components to Include:

- **SWOT Analysis:** Whether you include the initial SWOT analysis—assessing our organization's Strengths, Weaknesses, Opportunities, and Threats—or do an updated one at the end if any major positioning pivots were made. It provided valuable insights that should continue to inform our decisions as we move forward.
- **Strategic Pillars:** The strategic pillars established should serve as the backbone for all initiatives. Your organization must continuously refer back to these pillars to ensure our initiatives align with our core values.
- **Prioritize Initiatives:** During your sessions, you should have identified high-impact projects and ensure those are front and center so those initiatives get focused on and help drive your mission forward.
- **Align Your Budget:** Aligning your strategic priorities with financial planning is essential for sustainability. Your organization should regularly revisit our budgetary allocations to ensure they reflect our strategic goals.

Moving Forward: Actionable Steps:

- **Create a Strategic Plan Outline:** Consolidate your insights into a concise one-page summary that articulates our vision, mission, goals, and key strategies. This document will serve as a quick reference guide for all team members.
- **Develop a Resource Allocation Matrix:** To prioritize your projects effectively, the organization should maintain a resource allocation matrix. This will help you ensure that necessary resources are available for successful implementation and allow us to track our progress.

By reflecting on these key components and actionable steps, your strategic plan can remain a dynamic tool that guides the organization toward its envisioned future. Commit to revisiting this plan regularly, making adjustments as necessary, and celebrating your progress along the way.

Measuring Progress and Adapting Your Strategy

Let's discuss how to track progress using key performance indicators (KPIs) and make adjustments when necessary.

Tips for Success Measuring:

- **Setting measurable KPIs:** Learn how to identify the right metrics to track your progress.
- **Tracking tools:** There are many simple, cost-effective tools for measuring progress, from Excel dashboards to nonprofit-specific software like [Bloomerang](#) or [Salesforce Nonprofit Cloud](#).
- **When to pivot:** Even the best strategies need to evolve; this should happen as you connect to ensure you are on track strategically.

Final Steps:

- Set up a KPI dashboard that tracks key metrics like donor retention rates, program outcomes, and fundraising progress.
- Conduct quarterly strategy reviews to ensure your organization is on track and adjust goals as necessary.

CONCLUSION

Empowering Your Strategic Journey

Congrats! You've reached the end of this eBook, and now you're ready to roll up your sleeves and dive into strategic planning for your nonprofit. From focusing on what truly matters to conducting a solid SWOT analysis, building out strategic pillars, and prioritizing initiatives, you've got all the tools you need to create a plan that will stand the test of time.

But here's the thing: strategic planning isn't a one-time thing. It's a living, breathing process that will evolve with your organization. As you start to implement your strategies, don't forget to keep track of your progress using key performance indicators (KPIs). Stay flexible—because the nonprofit world is always changing, and you'll need to be able to adapt when new challenges and opportunities pop up.

By aligning your budget with your priorities and fostering a culture of collaboration, you'll set your organization up for success and resilience. And remember, we at Strat Labs are here to support you every step of the way. As a thank you for completing our eBook, we'd love to offer you a free consultation. Let's chat about your unique challenges and find tailored solutions to help you crush your goals.

Thank you for your dedication to making a difference. With thoughtful planning and the right strategies in place, you'll create lasting impact and drive meaningful change in your community.

Now, GO power your purpose!

If you or a nonprofit organization is seeking a dedicated partner to help boost capacity and free up valuable time for strategic planning—while keeping daily tasks like emails, social media, and other initiatives running smoothly—Strat Labs might just be the game-changing partner you're looking for. We specialize in giving nonprofits the support they need to focus on what truly matters, while we handle the behind-the-scenes work that keeps everything on track. Let's work together to amplify your impact and ensure your organization thrives long-term.

Contact hello@stratlabs.us or reach out on social media!



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