

# Successful Strategic Planning for Nonprofit Leaders

February 9, 2017

Sponsored by the Florida Housing Finance Corporation Catalyst Program

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# Catalyst Training Schedule

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# UPCOMING WORKSHOPS

- Webinar: Introduction to the Florida Housing Finance Corporation and its Funding Opportunities February 13, 2 pm – 3:30 pm
- Webinar- Preparing for your SHIP Monitoring Visit February 15, 2:00- 3:3- pm
- Workshop- February 17, 8:30 am – 5:00 pm Ocala
- Workshop- The Front Door Matters: Emergency and Crisis Housing Feb 21, 8am – 5pm Jacksonville

# A Few Logistics

- Participants are muted but we encourage you to post questions and comments
- The presentation will be emailed to you after the webinar.
- Additional questions? Just email or call!
  - [cook@flhousing.org](mailto:cook@flhousing.org)
  - 1-800-677-4548

# Overview

- Introduction to strategic planning
- Creating your strategic plan
- Implementing your strategic plan



# But first, A few questions for you!



1. Who are you?
2. Does your nonprofit currently have a strategic plan?
3. If so, is it useful?

# Introduction to Strategic Planning

What is a strategic plan  
and why do you need one?



# Basics

*A strategic plan* is a tool. It's not an end in itself, but a means to an end.

The Plan should guide the nonprofit to achieve its **mission** efficiently and with the greatest impact.





# Basics

The Plan should articulate:

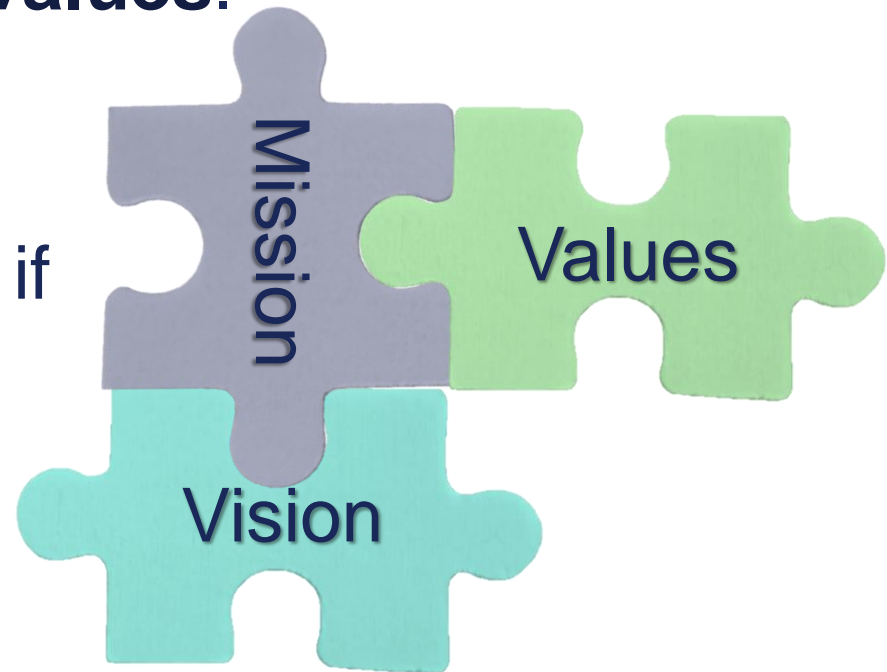
1. Specific goals
2. Action steps
3. Resources needed to accomplish those goals within a specified time table
4. Responsible parties

A reasonable time frame for the Plan: 3 years

# Grounding: Mission, Vision, Values

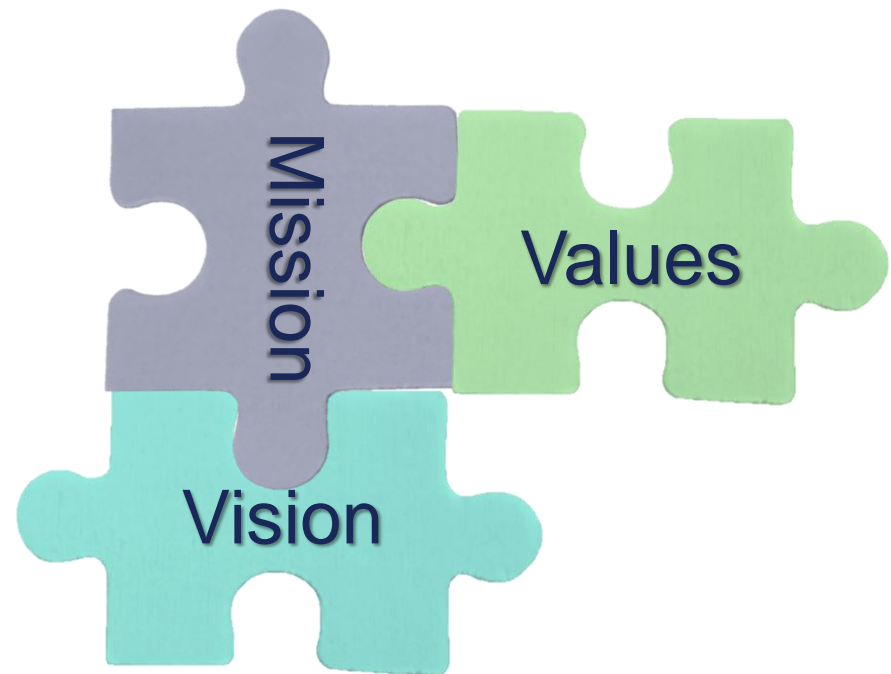
The Plan should guide the nonprofit to achieve its: **mission**, **vision** and **values**.

- Mission: Why you exist?
- Vision: What will happen if you succeed.
- Values: The principles underlying your work.



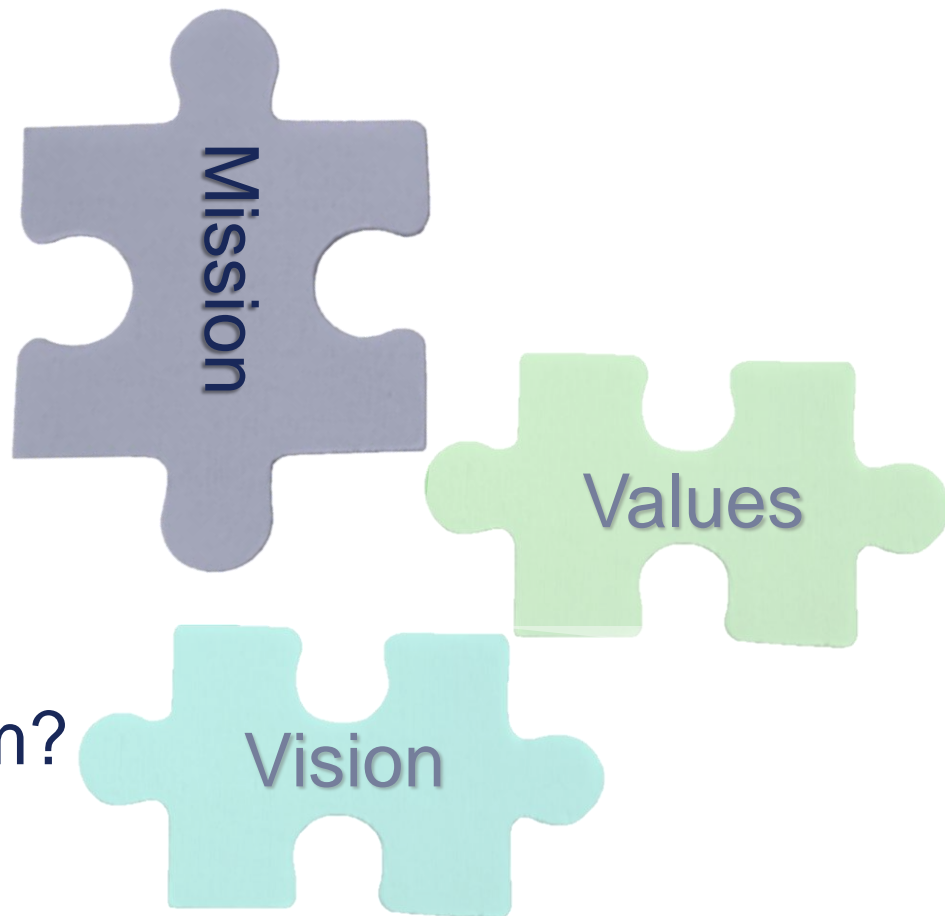
# Grounding: Mission, Vision, Values

As part of the Strategic Planning process, consider whether your mission, vision, and values need to be revisited.



# What is our Mission?

- Who are we?
- What do we do?
- Who do we do it for?
- What do those people need or want?
- How does what we do change or impact them?



- **OUR MISSION:** The Florida Housing Coalition's mission is to bring together housing advocates and resources so that all Floridians have an affordable home and suitable living environment.

# What is our Vision?

What will it look like if we succeed?

A one sentence statement describing the clear and inspirational long-term desired change resulting from an organization or programs work

Inspirational, clear, memorable, concise



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OUR VISION: Ending Homelessness One Person at a time.

OUR VISION: In every Florida community, there is an ethic to ensure all members of that community, including the most vulnerable and low income, are in affordable homes of that person's own choosing, and that each community have at least one community-based organization with the capacity to play an important role in delivering affordable housing or related services in that community.

# What do we Value? What are our guiding principles?

Integrity

Transparency

Excellence

Leadership

Empowerment

Community

Good

Stewardship

Collaboration





# What do we Value?

- **Respect** - afford trust and courtesy to all residents, staff, volunteers and board members.
- **Equality** - promote diversity and fair treatment of all.
- **Dignity** - respect for the totality and worth of each person.
- **Respect** - go ahead and beyond to meet the needs of those we serve.
- **Integrity** - be consistent in words and actions.
- **Advocacy** - be a compassionate voice for those we serve.
- **Collaboration** - work with community partners

# Methods to Energize Planning

- Brain storm- Where do we want to go?
  - Label input as Goal or Action Item
  - Consolidate Goals and Rank
  - Get consensus
  - Itemize Action items under goals
  - Review for SMARTness
- Use existing plan as base
  - Do SWOT exercise
  - Revise, retain or reject Goals and Actions



# Strategic Planning Phase 1

- Assemble Strategic Planning Team
  - Staff
  - Board Members
  - Consultant- Facilitator
- Timing
- Research

# Phase 2: Preparation- Where are we?

- External Facilitator
  - Conduct interviews
  - Complete organizational review
  - Serve as neutral party
- Stakeholder surveys
- Staff and board roles
- Resource mapping
- Research topics or issues identified

# Phase 3: Retreat Logistics

- Venue
- Materials
- Outline
  - Timeframe
  - Social time
- Facilitator role and preparation
- Expectations

# Phase 4: The Retreat- an Overview

- Overview, Introductions, Expectations
- Where are we now?
- Where are we going?
- How do we get there?
- How do we measure success?

# Where are we now?

- Staff positions and career stages
- Financials
- Contracts and Projects

# SWOT or Not?

SWOT Analysis	Helpful	Harmful
Internal	<i>Strength</i>	<i>Weakness</i>
External	<i>Opportunity</i>	<i>Threat</i>



# SMART Goal Setting

**S**pecific, significant, stretching

**M**easurable, meaningful, motivational

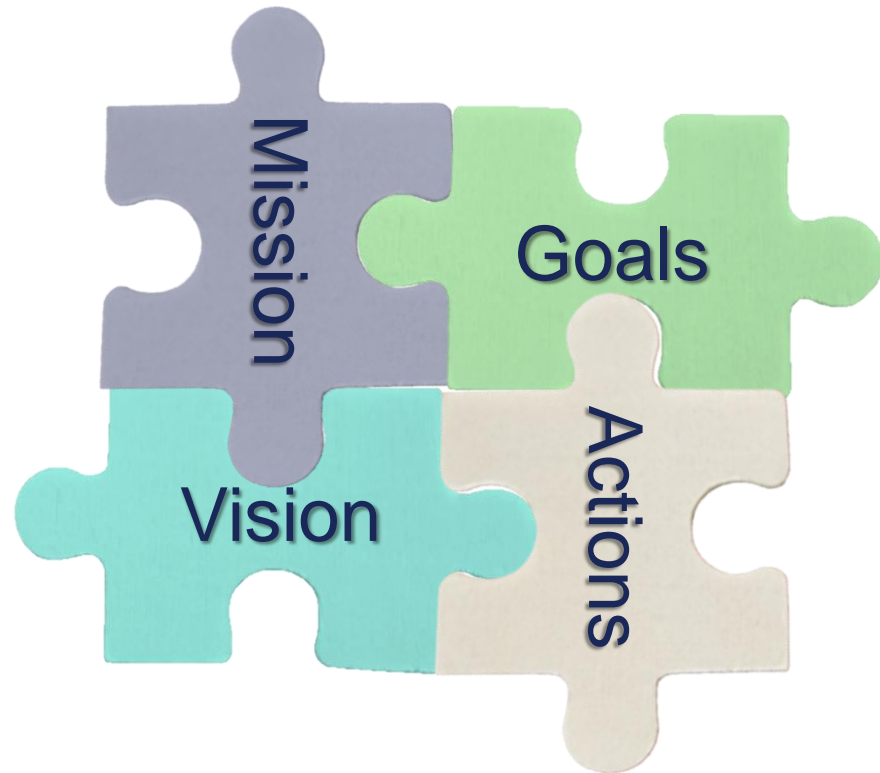
**A**greed upon, attainable, achievable, acceptable,  
action oriented

**R**ealistic, relevant, reasonable, rewarding, results-  
oriented

**T**ime-based, time-bound, timely, tangible,  
trackable

# Where do we want to be?

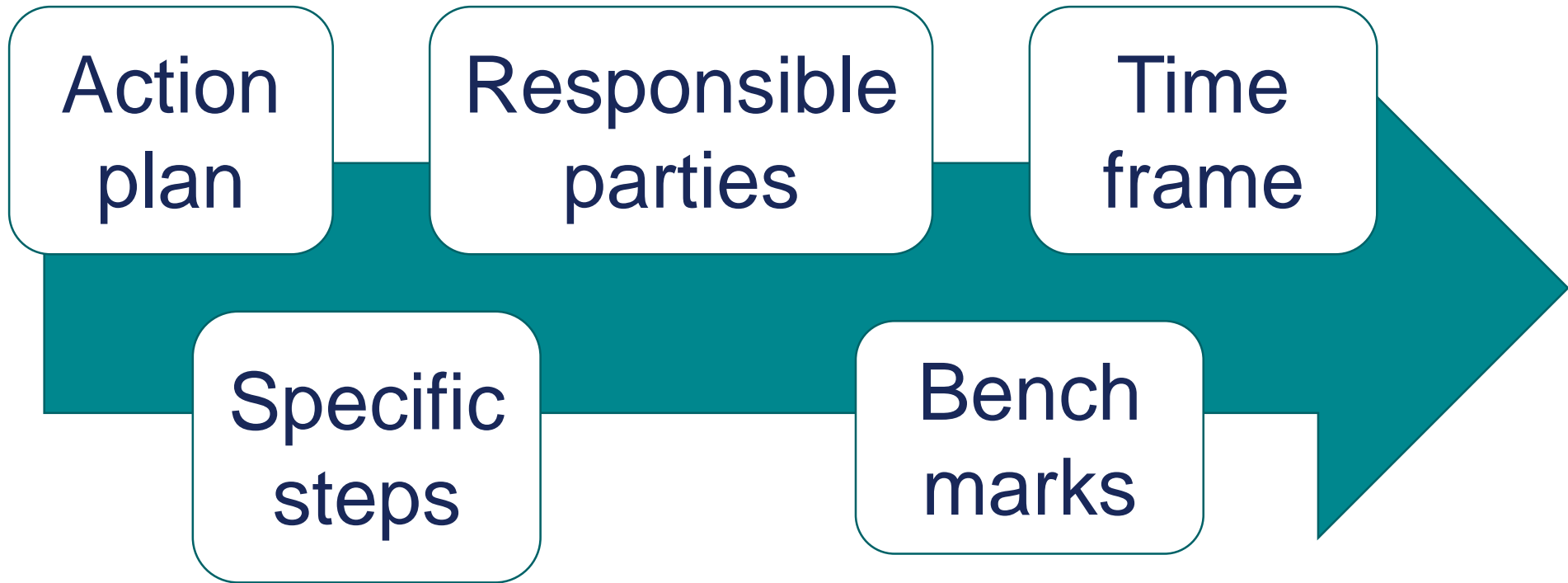
- Mission
- Vision
- Goals
- Actions



# How do we get there?

- Action Plan
- Specific steps
- Responsible persons
- Benchmarks
- Timeframe

# How do we get there?



# Planning- Goals or Issues?

## Goals-based planning

- Defined outcomes that reflect mission and vision
  - Longer range- 3-5 years
  - Should be ready for action

## Issue-based planning-

- Steps to solve problems and create change
  - Shorter time frame
  - May be necessary before taking on goals

# How Will We Monitor Progress?

- Without monitoring, plan could sit on the
- Regular reviews
- Staff- monthly
- Board - quarterly
- Staff and Board- annual meeting



shelf

# Getting Consensus

- Define problem
- Array solutions
- Measure risks and outcomes
- Find common ground



# Phase 5: Finalize the Plan

- Draft and complete the Strategic Plan
- Board adopts at next meeting
- Share with staff
- Share with stakeholders





# Putting the Plan to Work

- Implementation plan
  - Actions Steps- benchmarks
  - Timelines
  - Resources- Budget items
  - Responsible Parties
- Regular Reviews by Leadership
- Resource Deployment
- Responsible Parties

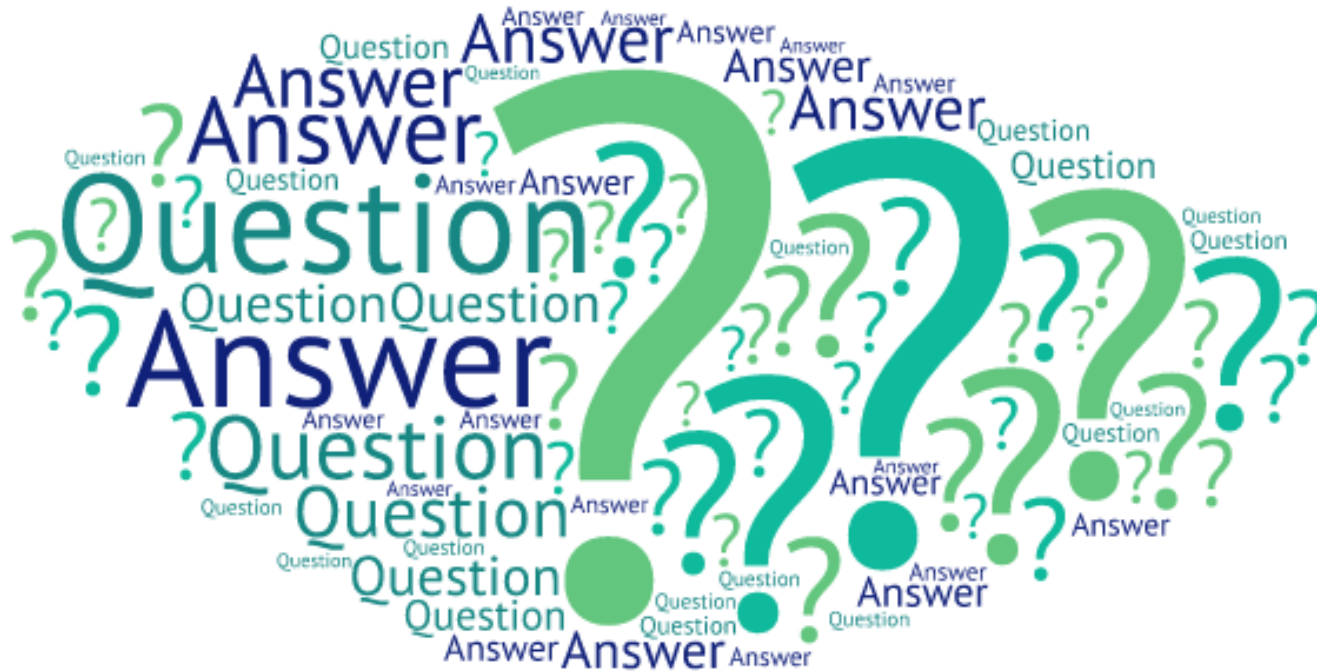


# Keeping the Plan Relevant

- Leadership reviews monthly
- Board reviews quarterly
- Adjustments made as necessary



# Questions & Answers



# Our Thanks to the Florida Housing Catalyst Program



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