



Contents

WHAT YOU WILL FIND IN THIS BOOK	xiii	
INTRODUCTION TO THE SECOND EDITION	xxi	
ACKNOWLEDGMENTS	xxiii	
CHAPTER 1	Introduction to Strategic Planning	1
	What Is Strategic Planning?	1
	Why Plan?	2
	What Strategic Planning Is Not	4
	Keys to Effective Strategic Planning	5
	Summary of Key Concepts	6
	Different Types of Planning	7
	The Strategic Planning Process	14
	The Language of Strategic Planning in the Nonprofit Sector	20
	How Much Time and Money Does It Take To Do Strategic Planning?	24
CHAPTER 2	Phase 1: Get Ready	31
	How Do We Get Started?	31
	Step 1.1: Identify the Reasons for Planning	32
	Step 1.2: Set Up Your Planning Process for Success	35
	Step 1.3: Develop a Plan for Gathering Information from Internal and External Stakeholders	39
	Step 1.4: Design Your Strategic Planning Process to Meet Your Organizational Needs	46
	Step 1.5: Write a Planning Workplan	62
	Case Study: Worksheet 1	68
	Case Study: Worksheet 2	71
	Case Study: Worksheet 3	75
	Case Study: Worksheet 4	81

CHAPTER 3	Phase 2: Articulate Mission, Vision, and Values	85
	Why Do We Need a Mission Statement?	86
	Step 2.1: Write (or Reaffirm or Rewrite) Your Mission Statement	87
	Step 2.2: Write Your Vision Statement	99
	Step 2.3: Articulate the Fundamental Values that Guide Your Work	107
	Case Study: Worksheet 5	118
	Case Study: Worksheet 6	120
	Case Study: Worksheet 7	122
CHAPTER 4	Phase 3: Assess Your Situation	125
	Review History and Current Scope and Scale of Operations	127
	Step 3.1: Prepare a History and Descriptive Profile of Operations	127
	Step 3.2: Articulate Previous and Current Strategies Overview of Information Gathering	129
	Step 3.3: Gather Information from Internal Stakeholders	134
	Step 3.4: Gather Information from External Stakeholders	135
	Step 3.5: Gather Information from Documents and Other Sources	140
	Step 3.6: Summarize Information into a Situation Assessment	142
	Case Study: Worksheet 8	149
	Case Study: Worksheet 9	153
	Case Study: Worksheet 10	158
	Case Study: Worksheet 11	160
	Case Study: Worksheet 12	162
	Case Study: Worksheet 12	168
CHAPTER 5	Phase 4: Agree on Priorities	177
	Overview of Phase 4	178
	Step 4.1: Analyze Data, Review Progress to Date, and Update Workplan	181
	Step 4.2: Use Business Planning: Tools for Assessing Your Program Portfolio	186
	Step 4.3: Agree on Each Program's Future Growth Strategy and Develop Your Program Portfolio	201
	Step 4.4: Confirm Your Future Core Strategies	204
	Step 4.5: Agree on Administrative, Financial, and Governance Priorities	214
	Case Study: Worksheet 13	221
	Case Study: Worksheet 14	224

	Case Study: Worksheet 15	227
	Case Study: Worksheet 16	230
CHAPTER 6	Phase 5: Write the Strategic Plan	235
	Step 5.1: Create Goals and Objectives	235
	Step 5.2: Understand the Financial Implications of Your Decisions	240
	Step 5.3: Write the Strategic Planning Document	249
	Step 5.4: Adopt the Strategic Plan and Next Steps	269
	Common Obstacles Encountered in Phase 5	270
	Case Study: Worksheet 17	274
	Case Study: Strategic Plan	277
CHAPTER 7	Phase 6: Implement the Strategic Plan	287
	Step 6.1: Plan to Manage Change	287
	Step 6.2: Develop a Detailed Annual Operation Plan	290
	Sample (Annual) Operating Plan: Program Goal for an Economic Development Agency	295
	Fund Development Goal for Museum (from Annual Operating Plan)	295
	Case Study: Worksheet 18	298
CHAPTER 8	Phase 7: Evaluate and Monitor the Strategic Plan	299
	Step 7.1: Evaluate the Strategic Plan and the Strategic Planning Process	299
	Step 7.2: Monitor the Strategic Plan and Update as Needed	301
	Life After the Strategic Plan Is Done	303
	Conclusion: A Word to Leaders	305
	Case Study: Worksheet 19	307
	Case Study: Worksheet 20	309
APPENDIX A	Blank Worksheets	315
APPENDIX B	Sample Workplans for Abbreviated, Moderate, and Extensive Planning Processes	373
APPENDIX C	Elements of an Effectively Managed Organization (EEMO^{2™}): An Assessment of Your Organizational Capacity	390
APPENDIX D	Self-Assessment of Board of Directors	408
APPENDIX E	Sample Techniques Used in Client Needs Assessment and Program Evaluation	413

APPENDIX F	Conducting Focus Groups	418
APPENDIX G	Techniques and Tools for Managing Group Process: A Toolbox of Meeting Process Tools and Techniques	426
APPENDIX H	Tips on Using Task Forces	434
APPENDIX I	Templates for Strategic and Operational Plans	438
APPENDIX J	External Stakeholders: Process Recommendations and Suggested Questions	442
APPENDIX K	Selected References	448
INDEX		451