



**All these factors of nonprofit organizational sustainability get addressed during strategic planning**

# NON-PROFIT STRATEGIC PLANNING

**WHAT** Strategic planning involves a set of activities that involves internal and external stakeholders that help an organization - as a whole - clarify the direction(s) it wants to pursue. It also articulates a clear set of steps and measurable milestones so progress made is visible and can be celebrated.

**BENEFIT** A good strategic plan: focuses agency efforts and resources, creates continuity of direction for the organization across time and leadership transitions, helps recruit relevant board and staff talent to the mission, activities, and programs and attracts foundations, funders and individual donors to your cause.

**FOCUS** The focus of strategic planning is the entire organization that takes into account all aspects of the organization including: Programs, Services, Staff, Board, Operations, Fundraising, Communications, Marketing/Public Relations and Advocacy.

**TIMEFRAME** A strategic plan typically covers the next 3-5 years of the organization. The length of time to complete Strategic Planning can be as little as 1 full day to 1 year depending on: the amount of stakeholder input desired, planning activities chosen, the number of people participating in the planning process and the size and complexity of the organization.

**WHO IS INVOLVED** At a minimum - all of top leadership including Board and Senior Staff. The best strategic planning processes also includes, at some point during the planning, outside stakeholders and partners as well as representatives from all levels of the organization to ensure buy-in and ownership of the plan.

# **SAMPLE 2-DAY PARTICIPATORY & ENGAGING STRATEGIC PLANNING SESSION WITH BOARD & STAFF**

**Review Mission and Major Organizational Accomplishments**

**Stakeholder Expectations:** (Prior Interviews, Surveys, or Focus Group)

**Trends Directly or Indirectly Impacting our Organization**

**5 Year Vision of Desired Organizational Results**

**Assess Current Organizational Capacities**  
Relative to Vision

**Strategic Goals for Years 1-3**  
to move toward vision of desired results

**Outcome Measures**  
to Track Progress

**Year 1  
Action  
Plans**

**Day 1**

**Day 2**

# RESULTS FROM 2-DAY STRATEGIC PLANNING SESSION WITH BOARD & STAFF FACILITATED BY HOLLINGSWORTH & CLIENT FEEDBACK

## RESULTS & BENEFITS FROM PLANNING SESSIONS:

1. Written summary document of all elements of the strategic plan
2. Enthusiastic consensus of both the board and staff on the agency's focused direction moving forward
3. Ownership and buy-in to the strategic plan that board & staff created together
4. Actionable next steps with clear roles, responsibilities and tasks for both board and staff to align their efforts
5. Ability to track progress made because of outcome measures
6. Compelling agency strategic plan to attach to your grant proposals to funders to increase their confidence to invest in your organization

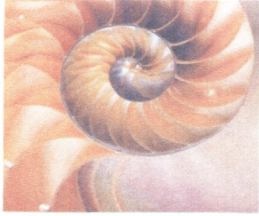
Anonymous **client feedback** written on planning session evaluations:

*"Absolutely refreshing to have an excellent facilitator so grounded in reality. Joyce is flexible, organized, and dynamic!"*

*"Brought many points of view together. Good system of helping our diverse group set priorities."*

*"Good process to define issues and develop focus and next steps with accountability and a time frame."*

*"Extremely productive use of participants gathered given limited number of hours we met. Time well spent that will provide a good blueprint for future activities."*



# HOLLINGSWORTH CONSULTING

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25 years serving 100+ nonprofit & government agencies

## APPROACH & GUIDING VALUES

Hollingsworth's core value is to **increase the capacity** of individual organizations and collaborative efforts to address the unique opportunities they confront. Her core competency, as an expert **neutral facilitator** of planning efforts and consulting projects, increases the capacity of organizations and collaborative initiatives to address the unique challenges they confront and set responsive directions. The methods Hollingsworth employs are participatory – knowing that **participation breeds ownership and commitment**. Hollingsworth will **partner with the organization** during the course of the project and **leverage the combined strengths** in order to achieve its desired outcomes. Hollingsworth provides a **flexible structure** for project management and meeting design and will work closely with agency leadership in order to fine-tune the planning process timeline and deliverables so they are **responsive to their needs**. Once mutual agreement is met about desired deliverables, outcomes and deadlines and a contract is signed, Hollingsworth will adhere to her commitments outlined in the project timeline and work plans.

**Skillful neutral facilitation, a guiding value of Hollingsworth's approach, is to:**

- **Have “no stake” in the decisions and outcomes of the project.** This means that the facilitator/consultant does not push certain recommendations on the substance or the directions an individual organization or coalition of agencies chooses to take. However, effective facilitators/consultants often outline, as appropriate, a relevant range of options or “best practices” other organizations or collaborations, in similar circumstances, have used to address the same kinds of issues and concerns.
- **Insure informed and full participation of diverse stakeholders.** Include, from the beginning, the diversity of people and stakeholder groups that should be involved at the table. This insures the relevant expertise, range of perspectives and life experiences, communities of color, cultural backgrounds and vested interests of different groups are represented when concerns and options are surfaced and discussed and also during decision making about strategies for moving forward.
- **Use participatory methods and dialogue.** These interactive and participatory methods, employed in each phase of the project, help the group/organization achieve the desired benefits of ownership and buy-in to the ultimate project outcomes, directions and implementation plans. An experienced facilitator will employ a variety of facilitation methods and tools to keep people engaged, illicit their informed participation and focused on task throughout the project.
- **Honor the variety of viewpoints.** Each person and agency has its own story it brings to the table. Respect for different perspectives, life experiences, cultural backgrounds and points of view are essential for developing trust.

- **Plan and design well before events.** Thoughtful and thorough preparation is the key to a successful project, meeting, or event. This includes ongoing clarification of the objectives of the overall project, individual phases and the activities and meetings within each phase. It also involves insuring the meeting space, arrangement of space, and the A/V tools and handouts used serve the specific objectives and agenda of the meeting and maximizes the intended interaction and easy transitions between different parts of the meeting. Meetings can fail when these are ignored.
- **Surface and name organizational paradoxes and conflicts.** Conflict and tension are part of the fabric of organizational life, multi-agency collaborations and planning processes. The skillful facilitator will name the conflicts as they emerge without blame so they can be taken into consideration and addressed as appropriate during the project/process. This insures the plan is based on realistic organizational and political dynamics and an honest assessment of current and anticipated individual organizational and/or collective coalition capacity.
- **Build consensus.** Building consensus while honoring diverse viewpoints is critical. This involves identifying the common underlying themes of agreement which emerge either in the midst of conflict or when there is general agreement on a topic or issue. However, on occasions when consensus is not clear, then a variety of group facilitation methods can be used to uncover and examine the underlying reasons for differences. The result of these efforts is often a revelation of underlying common values or intent that the group can use to move forward in the planning process.
- **Evoke the collective wisdom of the planning group.** This is part of the facilitator's posture of respecting the commitment and passion the planning participants have for their organization, cause, coalition, community, and region. A skilled facilitator will tap into the group's identity and goodwill and leverage that throughout the process to help the group move through the inevitable conflict and impasses.
- **Build capacity of individuals and groups to become change agents.** Because Hollingsworth feels strongly about the connection between personal transformation and community transformation, she strives to leave those with whom she works with a broadened perspective and set of practical tools that they can use to better advocate and affect change within their sphere of influence. This includes surfacing and examining best practices in educating the public, legislators and policy makers and advocating to address system wide injustices and inequities at the local, city, state and federal level.
- **Integrate research with action.** It is vital for an organization to gather relevant, objective, and reliable data and information about an issue it wants to address. However, it must move beyond just collecting and analyzing the data to applying the insights to make actual changes that addresses the problem. Hollingsworth helps organizations gather relevant data, reflect on findings and then use those findings to target improvement in communities, sectors, programs or services.
- **Leverage best practices and innovation.** It is important to learn from others who have successfully addressed a similar issue or concern. That means staying current with trends, best practices and benchmarks. Hollingsworth's extensive experience with innovation and breadth of consulting experience with a wide variety of organizations in different fields and professions gives her a deep knowledge base about how different organizations creatively address common concerns.
- **Use process as a means to an end.** A good facilitator knows that process is not an end in itself. However, a well-designed process with all of the above characteristics and elements, leads to the set of outcomes and deliverables the client wants. A thoughtful, participatory and interactive process will rally the many different stakeholders to own, support and implement the plan or recommendations they collectively developed.