



SORKIN CENTER STRATEGIC PLANNING

Overview

Nonprofit boards work closely with their Executive Director and staff leaders to set the organization's strategy. A thoughtful and clearly articulated strategy enables the nonprofit to advance its mission more efficiently and effectively. The most successful Strategic Plans take into consideration both the organization's internal constraints and resources, as well external opportunities and threats.

Many benefits result from a formal Strategic Plan. The planning process itself aligns boards and staff as they jointly agree on goals and a long-term vision for the organization. A Strategic Plan is critical to fundraising as it allows the nonprofit to share its vision with supporters. Finally, a Strategic Plan provides an opportunity to not only articulate where the organization will focus its efforts, but also to decide where it will not spend time and resources.

A Valuable Process

A structured strategic planning process can guide a board and Executive Director through the process of jointly establishing goals, setting priorities, aligning resources and staff, and creating action plans. A written Strategic Plan should also identify measurable goals for the organization.

Developing a Strategic Plan usually takes four to eight months for a nonprofit. Often staff and board members don't have the time to lead this special initiative on top of their regular commitments to the organization. Sorkin's Strategic Planning Consultants can lead a nonprofit through the strategic planning process. Sorkin's outside team can guide and support board and staff leaders by bringing a proven structure and methodology to the strategic planning process. The team can provide an outside perspective, undertake research and analytical tasks, and make the process more efficient overall.

Strategic Planning Phases and Activities

The strategic planning process is divided into phases that guide the work. While somewhat flexible, here is an overview of the phases and tasks often included in strategic planning:

Current Situation Analysis

- Gather input from key stakeholders through interviews, surveys and/or focus groups:
 - Board
 - Staff
 - Clients
 - Volunteers
 - Funders
 - Partners
 - Competitors
 - Other Stakeholders

- Conduct internal/organizational analysis
- Conduct external/environmental scan
- Conduct financial analysis
- Research comparable organizations locally or nationally, as appropriate
- Complete SWOT analysis (strengths, weaknesses, opportunities and threats)
- Facilitate mission, vision and values review with board and key staff
- Identify key strategic issues/questions

Strategy Formulation

- Synthesize data
- Identify & evaluate opportunities and threats
- Conduct additional research and analysis, as needed
- Draft strategic objectives and initiatives to be included in the Strategic Plan for board/management feedback

Building the Plan

- Facilitate Strategic Planning session(s) with board and key staff to
 - Prioritize goals
 - Understand implication of choices, including resources required
 - Assist in achieving consensus on strategic objectives, strategies and timeline
 - Define strategic outcomes and alignment
 - Hold additional sessions as necessary to build consensus
 - Create an implementation tracking tool to ensure success

Deliverable

The Sorkin team will provide a written Strategic Plan that identifies the key overarching goals along with the detailed initiatives required to achieve each goal. The deliverable will also include an Implementation Plan showing tasks, timelines, responsibilities, and metrics.

Project Team

The Sorkin team will include a lead consultant from Compass staff, plus two junior consultant volunteers.

Contact The Sorkin Center

For more information about Strategic Planning services, including pricing and scheduling, please contact Wendy Gualtieri at (202) 280-1761 or wgualtieri@compassdc.org.

About the Sorkin Center at Compass

As part of Compass, the Sorkin Center builds on Compass' years of experience and expertise in the local nonprofit sector. The Sorkin Center provides services to nonprofit boards, including trainings, facilitation, and strategic planning consulting. In addition, Sorkin's Corporate Services support employees serving on boards or those interesting in exploring board service. The Sorkin Center also partners with foundations to provide board member matching, as well as training and other support for nonprofit boards within a foundation's grantee portfolio.