

Adapting Your Strategic Plan in Uncertain Times

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Agenda

- Importance of Strategic Thinking & Planning
- Adapting Your Plan:
 - Getting Ready
 - Exercise #1: Mission Clarity
 - Exercise #2: Establishing Current Priorities
 - Exercise #3: Choosing High Impact Strategies
 - Exercise #4: Near-Term Action Plan
- Nimble Implementation
- Take-Aways & Toolkit



Importance of Strategic Planning

- **Strategic Planning:** A proactive approach to determining where your organization is going and how it will get there.

Core elements of a strategic plan are essential for:

Building case statement for fundraising / grant writing / public relations

Setting goals for the Executive and evaluating performance

Allocating resources, especially determining budgets

Recruiting board members, staff, and volunteers

Overall decision-making litmus test

- In times of rapid change & limited resources, it is even more important to know what your priorities are.

Getting Ready – Organizing the Process

Who will be involved?

In-person or virtual?

Retreat or segmented format?

Who will facilitate?

What about values & vision?

Quick Scan – Gathering Information About What Has Changed

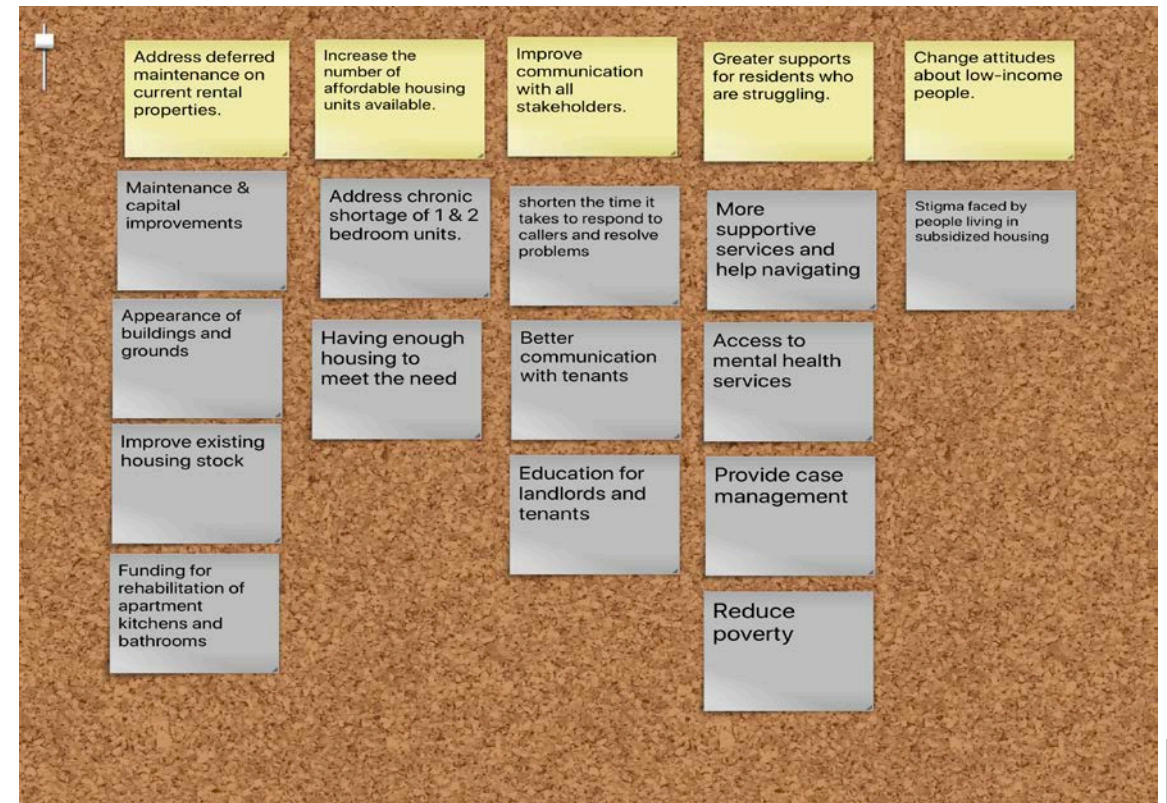
- Stakeholder input – Constituents, Staff/Volunteers, Board.
- Re-invention Questions:
 - ✓ Current & anticipated changes in core constituency and their needs?
 - ✓ COVID pivot activities or delivery methods that show future promise?
 - ✓ Pre-existing activities that are of declining relevance in a new reality?
 - ✓ Who else is serving our constituents and how might we work together to increase impact?
 - ✓ Mission clarity, relevance, and level of support?
- Internal/External data.
- Compile into a user-friendly format.

Exercise #1: Mission Clarity

- Statement of charitable purpose: what good, for whom?
- If stakeholder responses average less than a “B”, it’s probably time to revise.
- Leadership session:
 - Remove the “How”
 - Group brainstorm – Who? What Needs? Why?
 - Identify areas of greatest consensus
- Revision process:
 - Small group wordsmithing based on consensus concepts
 - Share draft and solicit feedback from full team

Exercise #2: Establish Current Priorities

- Discuss & identify **key points** from quick scan.
- Given existing plan priorities + key points, select top issues to focus on during the next 12 months.
- *If you have more than three priorities, then you don't have any* – Jim Collins.
- Wordsmith goal statements.



Exercise #3: Choosing High Impact Strategies

- Strategies – Major methods used to carry out your priority goals.
- Develop a Strategy Screen (example below):

Maximizes our
mission
impact

Builds on our
strengths &
expertise

Attracts
Resources

Pandemic
compatible
delivery

- Addressing one priority goal at a time:

Brainstorm – Existing effective strategies, existing strategies with changes, new strategies

Openness to blank slate thinking & “organized abandonment”

Exercise #4: Near-Term Action Plan

- Detailed plan of action for short spurts (3, 6, or 12 months at most).
- Assign a small group to each goal – this level of planning is more staff-driven.
- For each goal:

Focus on the highest impact strategies identified in the previous exercise

Lay out specific tasks, person responsible, and dates to be completed by

Take advantage of the pilot approach to test “small bets”, evaluate, and build on what works

Nimble Implementation in a Shifting Environment

- Assemble results into a revised plan and present it to the board for adoption.
- Communicate/share the plan at all levels of the organization & with stakeholders.
- Frequent progress review & mid-course corrections at management level.
- Frequent progress review at the board level. Use mission, priorities & strategy screen to evaluate choices in leadership decision-making.
- Schedule action plan updating 4-6 weeks prior to expiration.
- Maintain a mindset of continuous learning and improvement.
- Share and celebrate successes!

In Conclusion: Take-Aways

- Find the resource toolkit with specific instructions for these exercises on the I3 webpage.
- Successfully navigate change by maintaining a living plan.
- Inaction is a choice – don't wait for perfect information or certainties to get your plan out in front again.

The best way to predict the future is to create it

– Peter Drucker



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