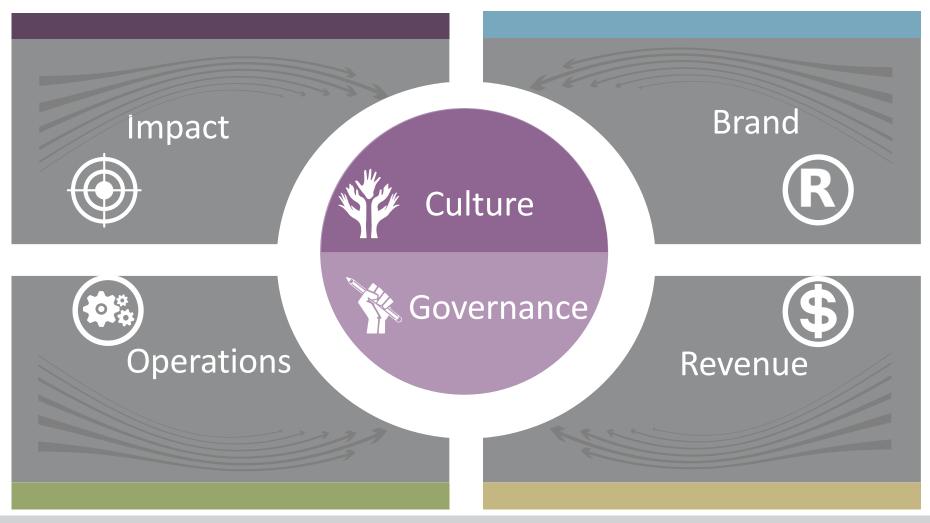
ACTION PLANNING FOR 2021

Sustainability

Organizational Focus Areas



Types of Plans

ACTION

- Focused on initiation getting the right things done in the right sequencing
- Created when getting an organization off the ground to help make good decisions

FOUNDATIONAL

- Focused on stability either in operations or transition
- Created when organization has hit a "limit to growth" due to operational and/or staffing constraints
- Typically done as growth is on the horizon for next plan

BRIDGE PLAN

- Focused on extending existing strategic plan
- Created when uncertainty in future funding or leadership exists and a new strategic plan is not yet plausible
- Requires review of results of existing plan as well as new areas to include

TRANSFORMATIONAL

- Focused on growth either in programming or geography
- Created when organization or community needs to go to next level
- Requires operational elements to be relatively stable and mature
- Requires community assessment of need

TURNAROUND

- Focused on continuity right-sizing mission with financials
- Created when organization has hit decline in lifecycle and needs swift action
- Requires competitive and community assessment



Steps to Creating Plan

If you don't have a plan



If you don't have a relevant plan, start fresh & create a 2021 "action plan"

Consider taking the following steps:

- Conduct a lifecycle assessment for a realistic view of current state
- Conduct a SWOT assessment and/or program review
- Triangulate above & discuss possible future state scenarios then ask:
 - What will best stabilize the organization?
 - What is the best use of time & resources?
 - What is going to prepare you for the future?



Nonprofit Lifecycle



							T CP	7
			ldea 🐳	Start-up 🔼	Growth 💅	Maturity 🙀	Decline 1	Crisis 🛕
	(Impact	Informal – Need established, best practices integrated & pilot launched	Pilot successful – Lessons integrated into design / Measurement starts	Established in marketplace – Strong results, partner-of- choice & consistent delivery	Consistent results through robust evaluation / Focused on continuous improvement, scale & system-building	Need exists, but nonprofit isn't partner-of-choice / Market duplication from other nonprofits	Demand near zero / Intense competition for resources & energy
	K GC	overnance	Not yet developed	Formal governance starts – Most likely homogeneous group	Board expansion – More diversity with more focus on planning & oversight	Board is more policy- & strategy-focused / Delegates management to Executive Director	Board members hard to recruit, retain & engage / Low focus of strategic issues	Board not fulfilling fiduciary responsibilities
W (Culture & Operations	Entrepreneurial Founder using volunteer resources for guidance / Culture is defined by Founder	Flat organization – Decisions are likely made by Founder / Volunteers needed for hands-on support / Culture is action- oriented	Founder has hired or becomes Executive Director and is key decision-maker with Board guidance / Increased division of labor & accountability as staff is hired / Culture is resultsoriented / Volunteers are used as resources	Leadership is often second or third generation from Founder / Clear division of labor & accountability among staff / Culture is well-defined and serves as a competitive advantage / Volunteers are seen as ambassadors	Increasing turnover of staff & volunteers / Decreased ability to attract top talent / Decreased transparency	Inability to fill key roles / High contention & division among staff / Mistrust of leadership
	\$	Revenue	Most are in-kind	Limited financial resources – Lives hand- to-mouth	More diverse financial resources with established relationships with funders, but still unpredictable	High degree of financial diversity with established relationships with multiple funders / Endowment exists / Higher degree of financial predictability	Funders are not renewing contracts and not contacting organization / Low cash reserves / Decreasing donor retention & loyalty	Cash reserves insufficient to cover operating expenses / Long-time donors tapped out
	R	Brand	Not utilized	First official marketing materials – Primary method of marketing is word-of-mouth	Build-out of marketing & communication needs, including public & media relations	Sophisticated marketing & communications plan using multiple channels / Everyone equipped to tell story	Decreased public interest / Issue area not discussed in the media	Unable to attract media or public attention / Messaging does not resonate with public







Template: Program Review

Background

Name	Brief Description	Start Date / History
XXX	XXX	XXX
Funding Source	Staff Involved and Roles / Location	Key Program Metrics
■ XXX - YOU	■ XXX	# served
■ XXX	■ XXX	■ % change

Template: SWOT Analysis

The most commonly used tool to conduct an organizational audit is the SWOT analysis, which is often used during the strategic planning process.

STRENGTHS

 What do you (as a program or organization) do better than anyone else?

WEAKNESSES

- What could you improve?
- What do others do better than you?
- What inhibits your ability to achieve success?

OPPORTUNITIES

- Where are the good opportunities facing you?
- What are the interesting trends you are aware of?

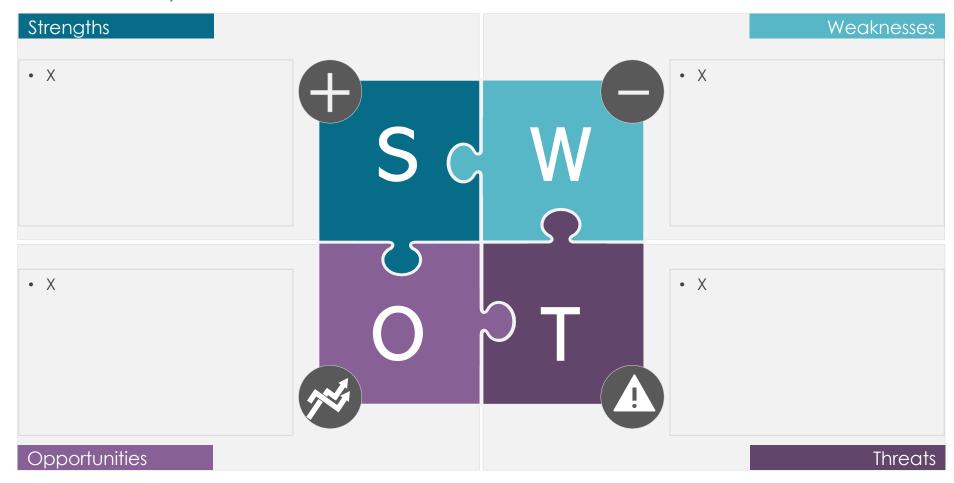
THREATS

- What obstacles do you face?
- What are other nonprofits doing that you should be worried about?
- What are funders doing that you should be worried about?



Agency Name

SWOT Analysis



Steps to Creating Plan

If you have a plan



If you have a plan, start with it and create a "bridge plan"

Take existing plan and evaluate each objective using assessment

- Continue anything needing additional work
- Sunset anything completed or obsolete
- Add anything needed based on current environment or new learnings:
 - Considering the following steps:
 - Conduct any lifecycle assessment for a realistic view of current state
 - · Conduct a SWOT assessment and/or program review
 - Think about:
 - o What will best stabilize the organization?
 - o What is the best use of time & resources?
 - o What is going to prepare you for the future?



Strategic Plan Assessment

SAMPLE

Objective	Grade (A-D)	Decision (Complete, Keep, or Modify)	Comments CEO & Team
Culture Cultivate an executive team committed to excellence and working toward joint organizational accountability	A	Keep	
Diversity Goal		Add	New Goal: Engage in an intentional process to integrate equity conversations into all decisions made at x

See linked Excel template

