

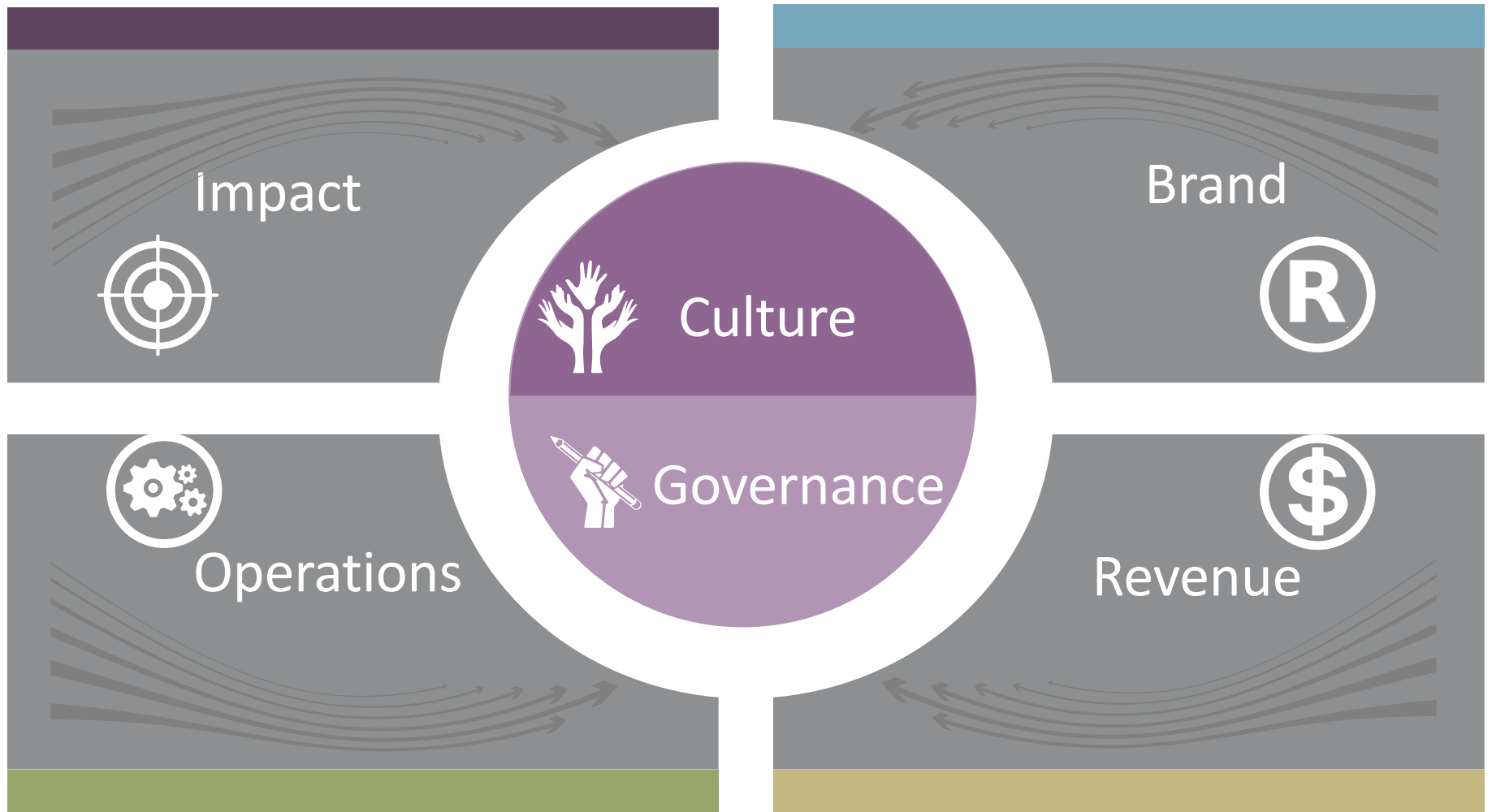


ACTION PLANNING FOR 2021



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

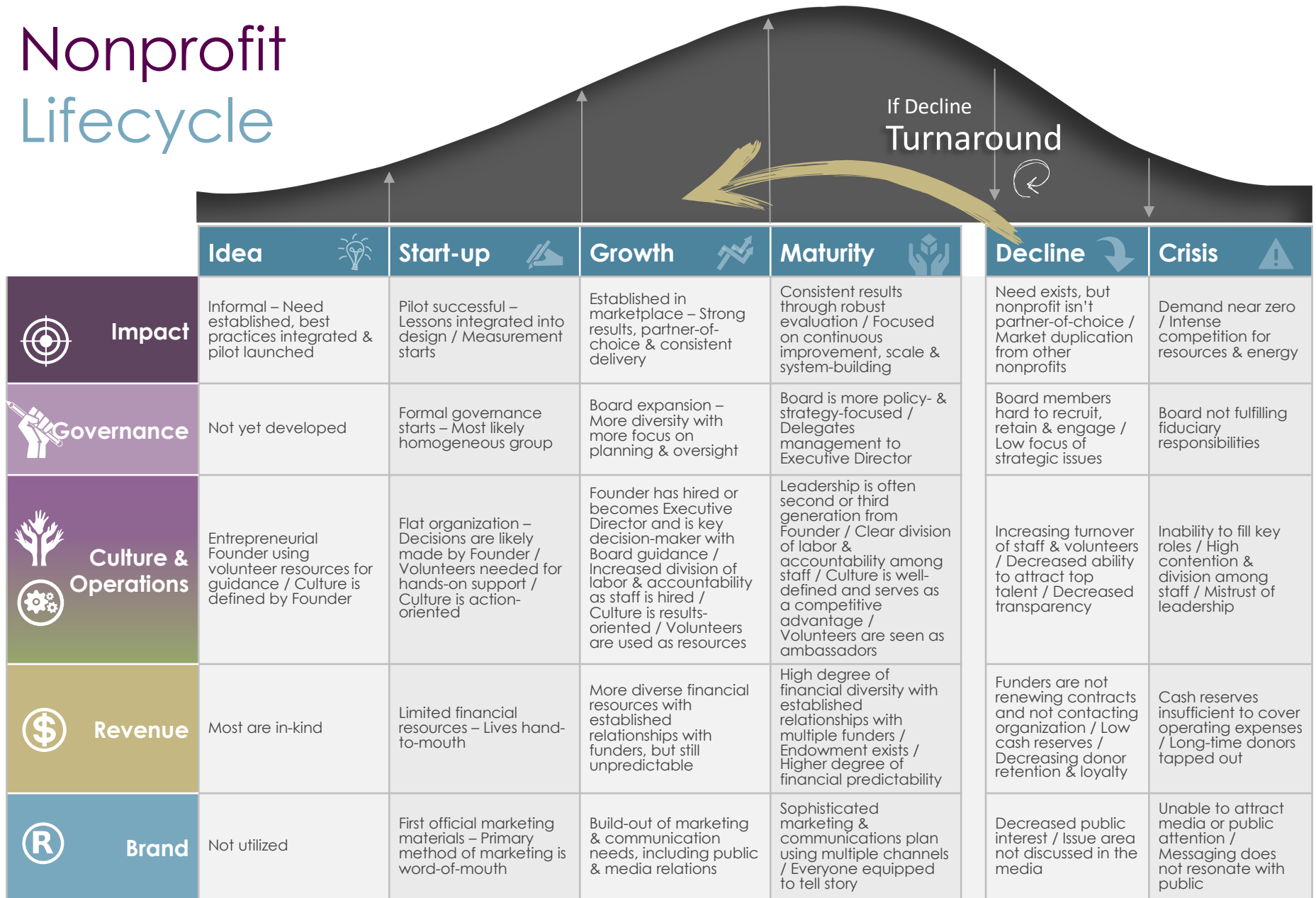


If you don't have a relevant plan, start fresh & create a 2021 “action plan”

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



Template: Program Review

Background

Name	Brief Description	Start Date / History
xxx	xxx	xxx

Funding Source	Staff Involved and Roles / Location	Key Program Metrics
<ul style="list-style-type: none">■ xxx■ xxx	<ul style="list-style-type: none">■ xxx■ xxx	<ul style="list-style-type: none">■ # served■ % 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

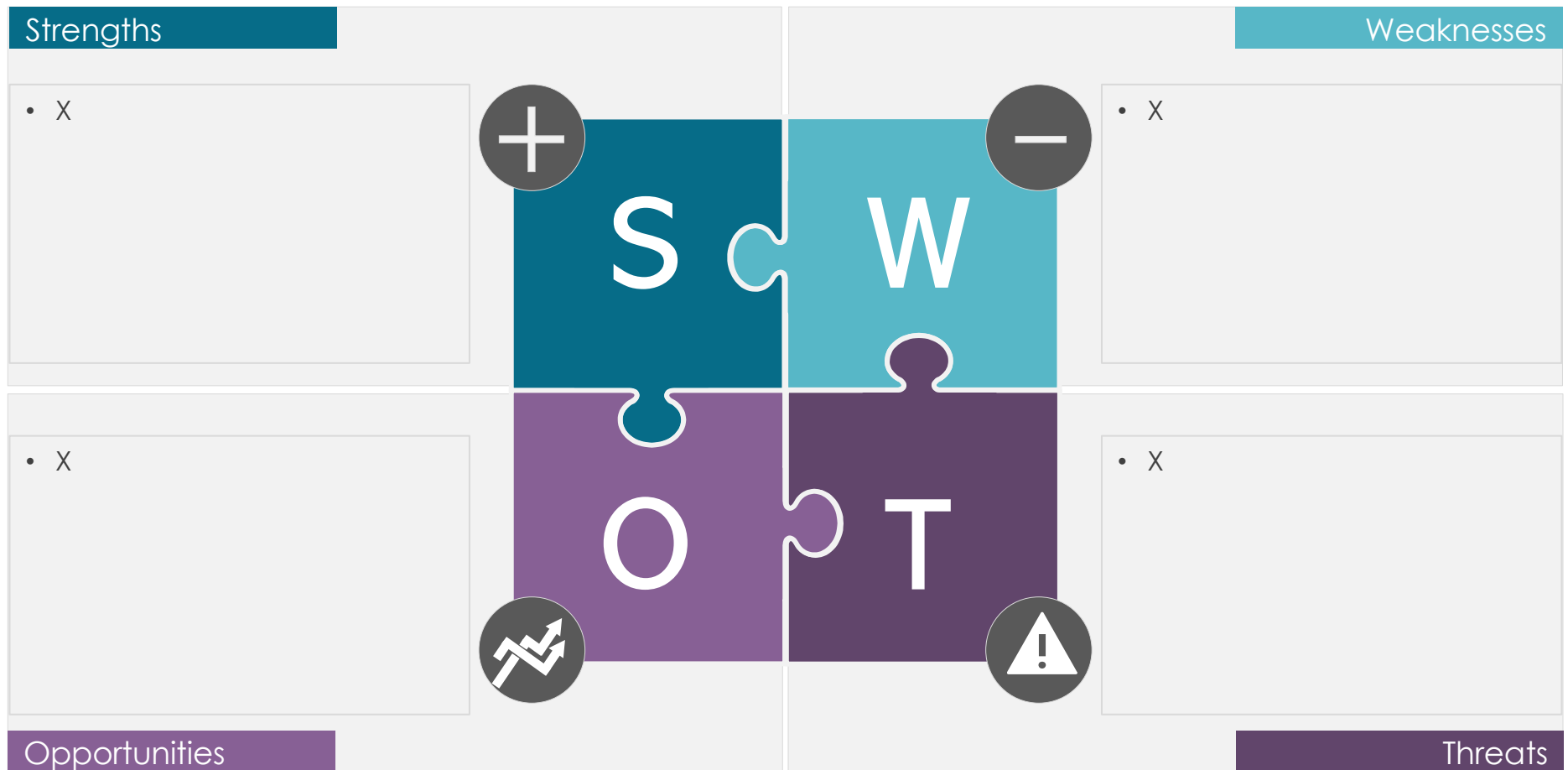
- Where are the good opportunities facing you?
- What are the interesting trends you are aware of?

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:
 - What will best stabilize the organization?
 - What is the best use of time & resources?
 - 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