

**SECTION II: RESOURCES**

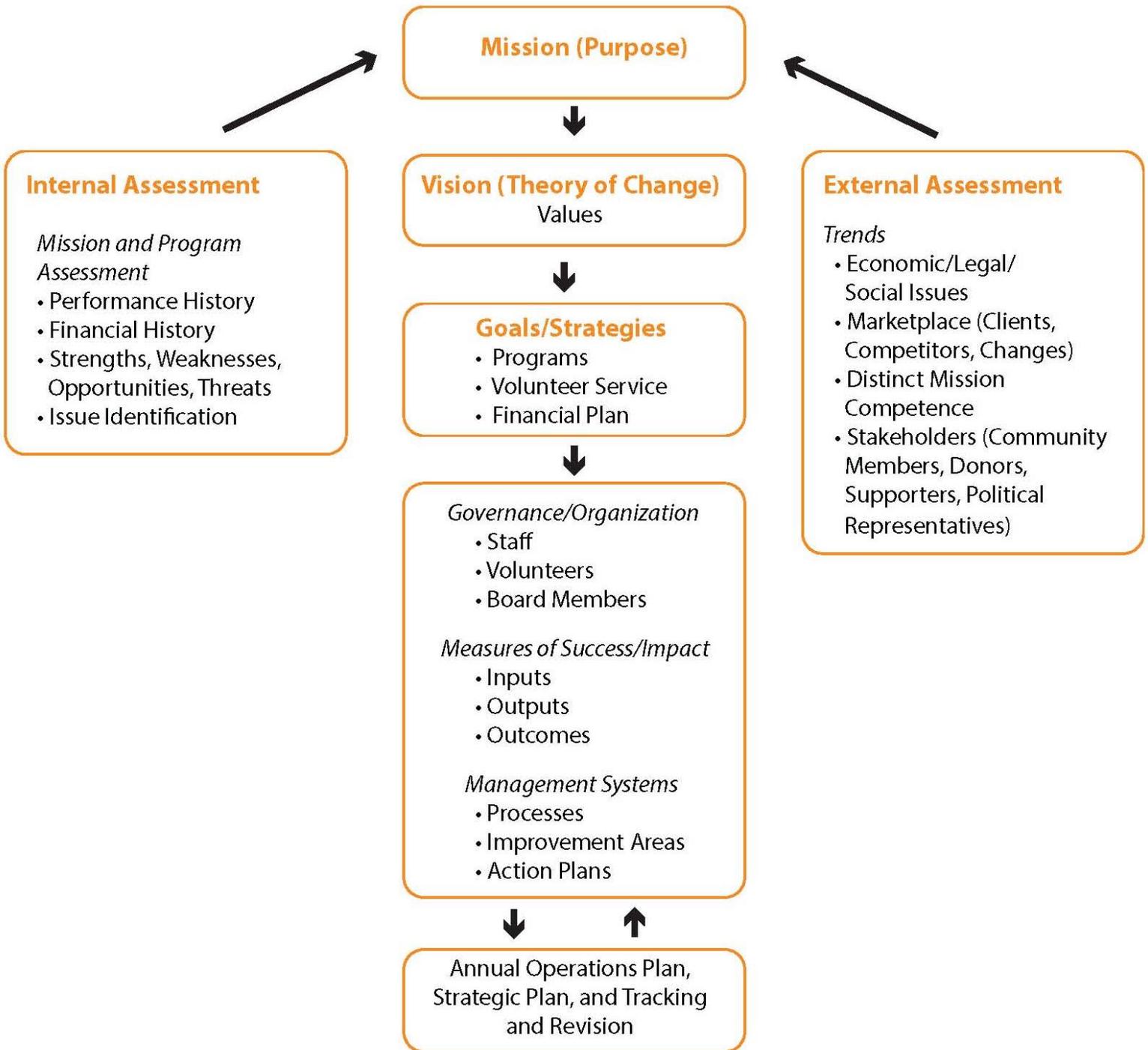
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**NYC** Service™

Strategic Planning  
Jumpstart  
For  
Nonprofit  
Organizations

November 2015

# Strategic Plan Outline



# Strategic Plan Jumpstart Checklist

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- ✓ **Mission (Purpose)**
  - What You Do, Who You Serve, Where You Serve, Why/Your Impact
- ✓ **Vision (Promise)**
  - What You Want To Do, Who Served, Where You Will Serve, Why Your Impact Will Matter
  - Reflect Theory of Change: What Is Different When You are Successful and Achieve the Desired Change...Impact
- ✓ **Values (Operating Principles)**
  - The Rules You Live By
- ✓ **Internal Assessment**
  - Timeline of Organization
  - Mission Impact History
  - Program and Services: Size, Scope, Results, Client Quality
  - Financial History
    - Operating: Revenue, Expense, Net
    - Balance Sheet
  - Governance
    - Board Size, Tenure, Friend-raising/Fundraising
  - Administrative Capacity
    - Staff Size, Talent, and Tenure
    - Facilities and Technology
- ✓ **External Assessment**
  - Economic Trends
  - Demographic Trends
  - Marketplace/Competitive Analysis and Community Positioning
  - Regulatory/Legal Changes
  - Key Stakeholders and Relationships
- ✓ **SWOT Analysis**
  - Strengths
  - Weaknesses
  - Opportunities
  - Threats
- ✓ **Organizations Top Issues (Big 5)**
- ✓ **Goals and Strategies**
  - Mission Differentiation/Positioning
  - Programs and Services
  - Funding
  - Infrastructure
  - Organization (Staff, Volunteers, Governance/Board)
- ✓ **Measures of Success**
- ✓ **Management Systems**
- ✓ **Implementation Plan**

# Anatomy of Mission and Vision Statements

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## The Anatomy of a Mission Statement

A mission describes your purpose within one to two sentences.

- Make it Memorable
- Answer the 4 Ws:
  - What do you do? What are the programs/services?
  - Who do you serve?
  - Where do you serve?
  - Why do you do it and how measure your impact?

An example of a mission exercise is to define the purpose of an organization by answering the following questions:

- Why does this organization exist?
- What does the organization do to achieve its purpose?

*NOTE: Always reference the original Articles of Incorporation and/or current By Laws as mission is reviewed.*

### Sample Mission Statements

The ABC Community Foundation helps people make a difference by inspiring the spirit of giving and by investing in people and solutions to benefit every neighborhood in ABC.

The City Community Center is a community-based organization in \_\_\_\_\_ which builds the potential of youth and adults through character building, education and healthy living programs, serving all people with a focus on families.

## The Anatomy of a Vision Statement

A vision is your promise world within one sentence. Overall, you are answering the question what would be different if you were successful.

Answer the 4 Ws:

- What do you want to do?
- Who do you do it for?
- Where will you do this work?
- Why will you do this work and how will positive change occur?

An example of a visioning exercise is to answer these questions and/or create headlines that describe your nonprofit in five years:

- How will our “community” be improved if we are successful in achieving our mission?
- What “services” will we offer that are known as best in class?
- How will our board and staff be known in the community?

#### Sample Vision Statements

The ABC Community Foundation seeks to create a community where people care about each other and help each other to improve education, economy and public safety by contributing time and resources to their city, engaging 50% of residents in voting, volunteer work, and contributions to nonprofit organizations.

The City Community Center will serve one out of every 10 families in our City within the next five years, creating opportunities for improved education, employment and health.

#### **Theory of Change**

A comprehensive description of how and why a desired change is expected to happen, and the connection between the program or change initiative/activities and the long-term goals.

#### Sample Theory of Change

The ABC Community Foundation will connect people’s volunteer time and resources to issues in the community, creating a positive impact on selected education, economic and public safety results.

The City Community Center will engage 10% of families, directing them to actions which improve the individual education, employment, and/or health results of the youth and adult members of the family.

## Internal Assessment

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A strategic evaluation of your organization's history, strengths, weaknesses, opportunities, and threats build a strategic framework of mission, vision, goals, and resource allocation as well as priorities.

### Organization Timeline

Create a timeline with key events in the history of your organization.

### SWOT Analysis

Ask your staff and board to identify your internal strengths and weaknesses and the external opportunities and threats. This is best done in a group setting, but you can also survey for responses.

#### **Top Three Programs (Scope, Size and/or Impact) and/or Top Three Issues:**

1.

2.

3.

<b>STRENGTHS</b>	<b>Top Three Strengths:</b> 1. 2. 3.	<b>WEAKNESSES</b>	<b>Top Three Weaknesses:</b> 1. 2. 3.
<b>OPPORTUNITIES</b>	<b>Top Three Opportunities:</b> 1. 2. 3.	<b>THREATS</b>	<b>Top Three Threats:</b> 1. 2. 3.

**Financial Overview**

**Organization Name:** \_\_\_\_\_

<b>Revenue/Funding Sources – Private</b>	<b>Last Year</b>	<b>Two Years Ago</b>	<b>Three Years Ago</b>	<b>Four Years Ago</b>
<b>CORPORATE</b>				
Number of Corporations				
Funding				
<b>FOUNDATION</b>				
Number of Foundations				
Funding				
<b>INDIVIDUAL</b>				
Number of Individuals				
Funding				

<b>Revenue/Funding Sources – Government</b>	<b>Last Year</b>	<b>Two Years Ago</b>	<b>Three Years Ago</b>	<b>Four Years Ago</b>
<b>FEDERAL</b>				
Number of Grants Received				
Funding				
<b>STATE</b>				
Number of Grants				
Funding				
<b>CITY</b>				
Number of Grants Received				
Funding				

<b>Organization Revenue and Expense</b>	<b>Last Year</b>	<b>Two Years Ago</b>	<b>Three Years Ago</b>	<b>Four Years Ago</b>
Total Revenue				
Total Expenses				
Personnel				
Facilities				
Other				
Total and By Program				

<b>Organization Net Information</b>	<b>Last Year</b>	<b>Two Years Ago</b>	<b>Three Years Ago</b>	<b>Four Years Ago</b>
Fund Balance				
Cash				
Investments				
Audit Results				

## External Assessment

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**Organization Name:** \_\_\_\_\_

Community Demographics	Last Year	Two Years Ago	Three Years Ago	Four Years Ago
Number of Communities Served				
Ethnicity Breakdown				
Employment Rate				

**Describe the communities you serve:**

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**Please provide a list of key stakeholders:**

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**Please provide a list of organizations comparable to yours:**

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**Please describe the current areas of impact on your organization:**

Economy

Government Regulations

Government Policies

Other

### **Other Resources and Tools**

- Allison, Michael, and Jude Kaye. *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*. Hoboken, NJ: Wiley, 2005. Print.
- Bell, Jeanne, and Jan Masaoka. *A Nonprofit Dashboard and Signal Light for Boards*. <http://www.blueavocado.org/content/nonprofit-dashboard-and-signal-light-boards>.