

# HOW TO WRITE A STRATEGIC PLAN

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# Outline

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- Introductions / Overview
- Strategic Planning: Why?
- Strategic Planning: How, What, Who, When?
- Overcoming Challenges and Pitfalls
- Sample Strategic Plans
- Q & A

# About me

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- Adjunct Lecturer at HKS
- Two decades' experience in the nonprofit and philanthropic sector, designing and leading large global and national initiatives and organizations
- Board experience on boards and advisory boards
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# What is a strategic plan and why is it needed?

- A roadmap to launch and grow your organization
- Process as important as product (perhaps more important)
- Aligns stakeholders around strategic priorities
- Communicates your goals, strategies and programs
- Engages, motivates, and retains external and internal audiences (e.g., board, staff, donors, etc.)

# Process, not just a Product



# Analysis and Assessment

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- Scanning the field:
  - ▣ Builds knowledge on trends, best practices, existing initiatives, gaps, etc.
  - ▣ Builds buy-in through stakeholder engagement
  - ▣ Enables the organization to position itself in a larger landscape
  - ▣ Clarifies the unique value-add of the organization or initiative within a complex marketplace

# Strategy Development

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- A process, not simply a product
- Dynamic, not static
- Engages board, staff, funders, clients, community
- Helps organization align mission, programs, capacity

# Key Components

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- Executive Summary
- Mission and Vision
- Environmental Analysis / SWOT
- Goals, Priorities and Strategies
- Additional components: financial plan, evaluation, staffing / operational plan



# Mission, Vision, Values

- Mission Statement: your purpose
- Harvard Kennedy School:
  - ▣ [http://www.hks.harvard.edu/ocpa/pdf/HKS\\_Facts\\_Current.pdf](http://www.hks.harvard.edu/ocpa/pdf/HKS_Facts_Current.pdf)
- Ford Foundation:
  - ▣ <http://www.fordfoundation.org/about-us/mission>
- Open Society Foundation:
  - ▣ <http://www.opensocietyfoundations.org/about/mission-values>

# Environmental Analysis

- Reviewing literature
- Identifying and analyzing similar organizations working on the issue or in the same geographic region
- Interviewing experts in your field and related fields
- PEST: political, economic, social, technological factors that affect your organization's mission and approach
- SWOT: your organization's strengths and weaknesses, as well as opportunities and threats

# Goals, Priorities and Strategies

- Outlines the goals, priorities, and strategies to meet the mission
- 3 -4 overarching goals aligned with mission
- Priorities, activities, objectives, strategies are in more depth, have more specificity – each goal could have a few different objectives / strategies associated with it
- Need to find balance between aspirational and forward looking versus specific and tangible

# Other components

- Financials (how do your financials align with your aspirations?)
- Staffing
- Evaluation (what will success look like?)
- One page summary / Key highlights / dashboard to track progress

# Executive Summary

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- Can be the most important part of the document – may be the only portion read by external stakeholders
- Should succinctly convey the future direction, priorities and impact
- Write this last!

# Overcoming Challenges and Pitfalls

- Challenge of consensus over clarity
- Challenge of who provides input versus who decides
- Preparing a long, ambitious, 5 year plan that sits on a shelf
- Finding a balance between process and a final product
- Communicating and executing the plan
- Lack of alignment between mission, action, and finances

# Examples of strategic plans

- <http://foundationcenter.org/about/FoundationCenter2020.pdf>
- <http://www.state.gov/documents/organization/223997.pdf>
- [http://www.amnesty.org/sites/impact.amnesty.org/files/POL%2050\\_002\\_2010%20Public%20ISP.pdf](http://www.amnesty.org/sites/impact.amnesty.org/files/POL%2050_002_2010%20Public%20ISP.pdf)

# Q & A

