

# STRENGTHENING YOUR ORGANIZATION THROUGH STRATEGIC PLANNING

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PRESENTED BY NEIGHBORGOD PARTNERS

JOE MYER & REBECA DENNIS

NATIONAL SELF-HELP HOUSING CONFERENCE

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# PLEASE SHARE YOUR EXPERIENCE

Who has participated in strategic planning? In what role?

Did it generate a workable plan?

Is it in use and are goals being accomplished?

What went right? What went wrong?

What did the organization learn from it?

# THE SIGNIFICANCE OF PLANNING

**IT ANSWERS THE QUESTION:**



***Where does the organization want to be in 3 to 5 years?***

- Take a step back from day-to-day operations
- Honest organizational assessment – strengths & weaknesses
- Look at changes in external environment for opportunities & threats
- Revisit vision, mission, and core values
- Strategic thinking, creation of scenarios, set a course forward
- Develop ambitious yet achievable goals

**Strategic Planning is a role of the Board and Management**

# WHAT IS YOUR BOARD'S FRAME OF REFERENCE ?

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## **Retrospective: Board tends to look backwards**

Highlights “good old days”, accomplishments, appreciates organizational history

## **Present: Board tends to look at the here & now**

Faithfully reviews current goals, the financial picture, assesses Lines of Business, and as committees working

## **Future: Board tends to look forward**

Meeting time is allocated to envision the future and what members want the organization to become

Retreats are held & strategic planning is viewed as “essential”

# LOOK AT THE, PAST, CONCENTRATE ON THE PRESENT, & FUTURE



## **Be Aware of Past: History & Heritage**

- Why and when was the organization created?
- How has the mission & organization changed?
- Notable accomplishments. What difference it has made?

## **Concentrate on Present: Current Status**

- Current strengths and weaknesses
- Organization's niche, what is it known for? What does it do better than any other?
- Status of leadership, finances, lines of business

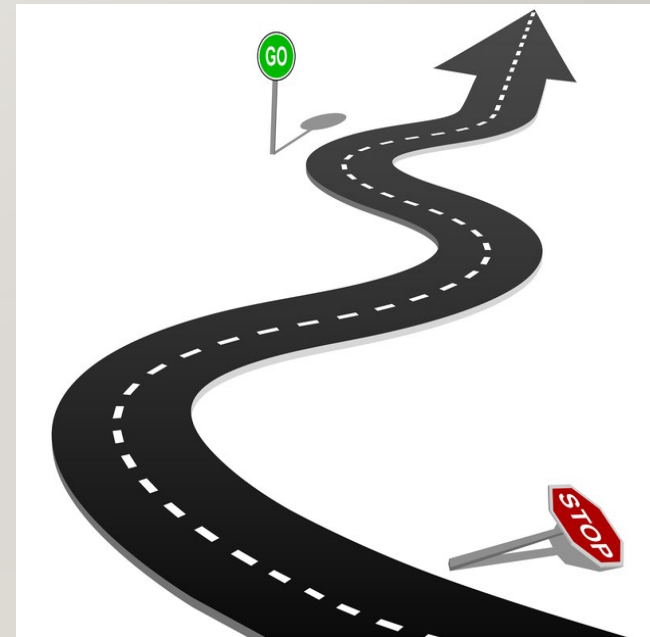


# LOOK TO THE FUTURE

## **Future:** Desired or Preferred State

- Think about mission and vision
- Who do you want to serve and where?
- How is the environment guiding you?
- What opportunities do you see?
- What are natural areas for growth?
- Possible new programs, services, lines of business

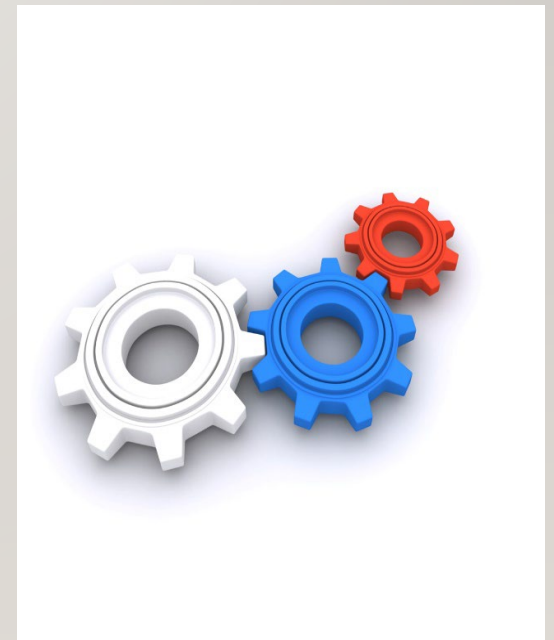
***What is the pathway to the future?***



# THE PROCESS

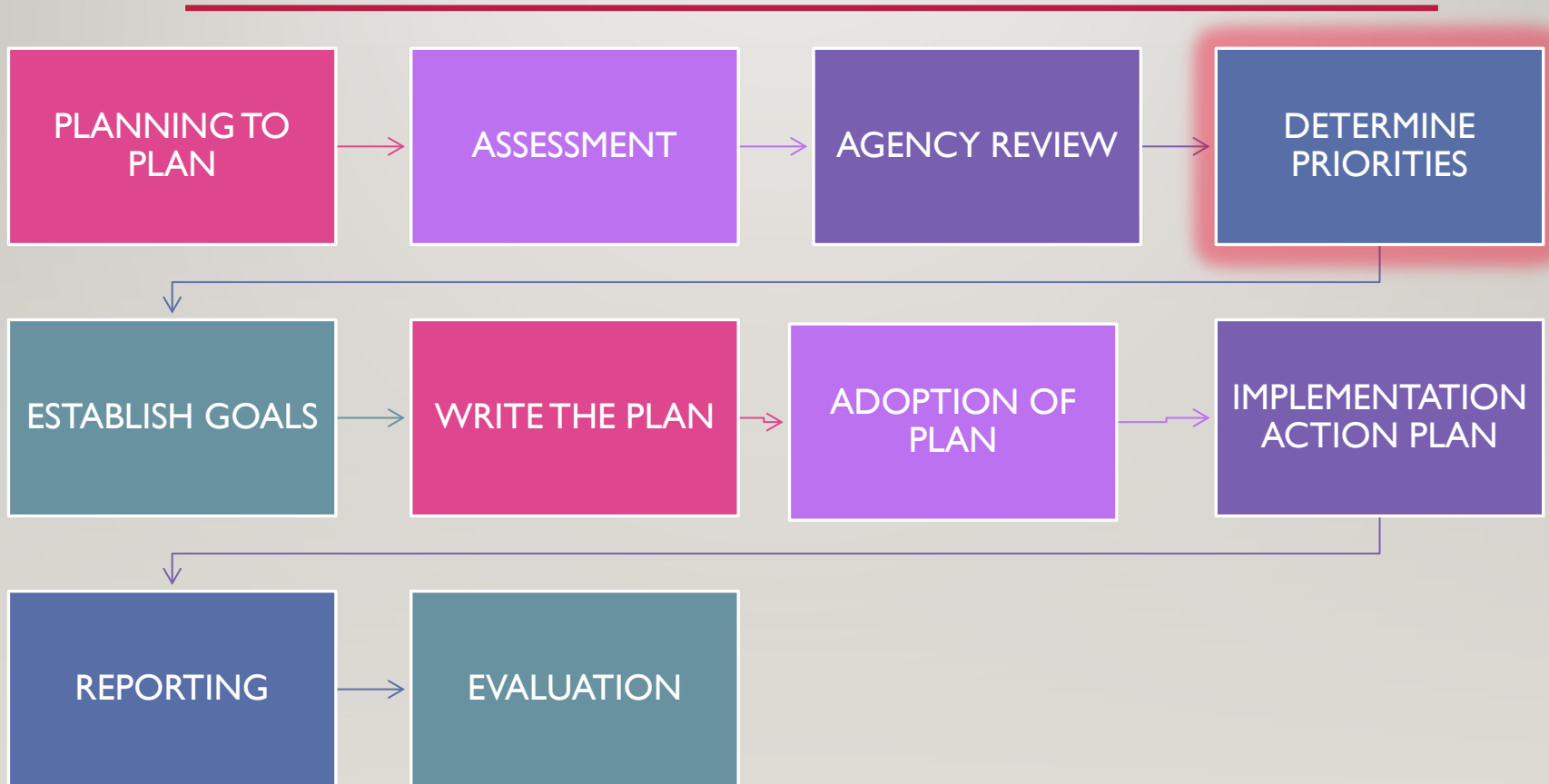
**An honest assessment, testing of relevance, and viewing change on the horizon - making it all work for you!**

- Committee develop steps and process
- Look at the environment and key trends
- Discover what stakeholders say & suggest, surveys
- Articulate strengths to build upon
- Admit weaknesses to correct or resolve
- Discover opportunities and threats
- Ask strategic questions for organization & LOBs
- Assess Mission
- Creatively develop strategic goals



# CHARTING OUT THE PROCESS

Committee should list out the process, steps, and a schedule



# BENEFITS OF STRATEGIC PLANNING / CONSEQUENCES OF NOT PLANNING

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## Benefits:

Focuses on the future (GPS)

Organization looks at its capacity

Looks at its operational environment

Works at problems & challenges

Poises NP for greater success

Identifies short & long-term opportunities

Determines its own destiny

## Consequences:

Flies without radar

Misses opportunities

Unresolved problems

Future is out of control

Chaos





# ASSESS THE EXTERNAL ENVIRONMENT

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Political

Economic

Social

Technological

Legal

Environmental

# ASSESS THE INTERNAL ENVIRONMENT



# DIFFERENCE FROM BUSINESS PLANNING

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- **Strategic planning** is bigger picture, usually at a higher level, with impacts for the organization as a whole or across lines of business. Looks to advance the organization.
- **Business planning** is typically within a particular line of business (program or service) looking at specific revenues, projections, out- comes, staffing, and performance.

# SETTING AND FACILITATION FOR STRATEGIC PLANNING

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**Setting:** Retreat to a conducive place; have a Board/Mgmt. committee plan it; get casual, comfortable, and creative; invest some \$; raise expectations; plan some things that will not be forgotten; allow for some relaxed “get to know each other” time; make it fun.

What settings have you tried for planning retreats?

**Facilitation:** Generally, use an outside facilitator to guide and facilitate the process. Some funders will pay for strategic planning.

Has a funder ever paid for your strategic planning?



# SWOT ANALYSIS

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**S**trengths, **W**eaknesses, **O**pportunities, **T**hreats



# SWOT ANALYSIS



## ***Please***

- ***Share an organizational strength to build on:***
- ***Share an organizational weakness to resolve:***
- ***Share an opportunity to take advantage of:***
- ***Share a threat that will have to be managed:***



# VISION QUEST



“A clear vision of the desired state of the organization is an essential component for high performance.” Tom Peters, In Search of Excellence

## Vision:

- What do you most want to see happen?
- If you could “have it all”, what would it be?
- What would you most like to accomplish?
- What would you shoot for if there were no obstacles?
- What would you set out to do if you couldn't fail?

# MISSION

YOUR ORGANIZATION'S ROLE IN BRINGING ABOUT A CHANGE IN "YOUR WORLD"



## Typical Mission Elements:

- **Who** is served?
- **What** needs exist and how do the services/programs address those needs?
- **How** are those services carried out?
- **Where** are services delivered?
- **What** role does the organization play in the sector?

**The Humane Society** - *Celebrating Animals, Confronting Cruelty*

**Smithsonian** - *The increase and diffusion of knowledge.*

**Heifer International** - *To work with communities to end hunger and poverty and care for the Earth.*

# STRATEGIC GOALS



## Develop goals that:

- Enable fulfillment of the Mission
- Will take the organization from current to the desired state
- Have the ability to be quantifiable and measured
- May be broad in nature and will need specific objectives, timeframes and resources to accomplish
- Build organizational capacity
- Consider a reasonable number of strategic goals



# EXAMPLES OF STRATEGIC GOALS



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- Expand self-help housing into an adjacent county and research the feasibility of purchase repair
- Develop capacity to do site and subdivision development
- Raise \$250,000 in discretionary funds for reserves and opportunities
- Develop complimentary lines of business such as home-ownership counseling, mortgage packaging, or rental housing
- Improve financial management and human resources (HR) capacity

SHARE A STRATEGIC GOAL THAT YOUR ORGANIZATION HAS:



*Share a strategic goal that your organization is currently undertaking?*

# ACTION PLAN TEMPLATE

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STRATEGIC GOAL:

OBJECTIVE #1:

Action Description	Dept. / Staff Assigned	Resources Needed	Start Date	Target Date	%age Completed	Status Explanation

# ACCOMPLISHMENT OF STRATEGIC GOALS?

**MISSION:  
ACCOMPLISHED!**

Each goal will need an action plan detailing and breaking out what is required to accomplish it:

- Objectives, steps, and activities that will lead to the goal
- Persons/teams responsible for achieving the steps
- Timeframes for accomplishing steps
- Price tag and budget financial resources needed
- Evaluation and accountability

# PLAN IMPLEMENTATION

## *What do we do with the strategic plan?*

- Put it on the shelf to gather dust? NO
- Package it, use it, invest in it!
- Implement Action Plans - assign work, give timeframes and make strategic goals part of the business or operations plan
- Interpret it to staff and stakeholders
- Report regularly on progress at Board and staff meetings
- Modify the plan when assumptions change



# FINAL THOUGHTS & THANK YOU

Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before defeat. - Sun Tzu

