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Strategic Planning for Nonprofits

A strategic planning process identifies strategies that will best enable a nonprofit to advance its mission. Ideally, as staff and board engage in the process, they commit to measurable goals, approve priorities for implementation, and also make a plan to revisit the strategy on an ongoing basis as the internal and external environments change.

Many nonprofits start the process by identifying the nonprofit's strengths and weaknesses, as well as external opportunities and threats, in what is commonly called a "SWOT" analysis. Looking at external factors (community needs or the economic outlook, for example) as well as internal capacity is important.

Looking ahead and planning for the future actually should be continuous: as various factors change, the nonprofit may need to adjust its plans. While the process of bringing everyone together to plan for the future is energizing, once the process is in the rearview mirror, don't let the plan gather dust on the shelf. If no one refers to the plan after it is completed, then it's hardly serving as a "strategic" guide! Revisit the plan periodically, making adjustments and adapting the plan as circumstances change.

Some have argued for throwing out the “plan” completely, or reducing it to a very short, concise document, easily digestible by staff and board. Articulating an organization's "theory of change" is another way to think about what success will look like, how to get there, and what resources will be needed. There are hundreds of consultants and volumes of written materials just on strategic planning, and many others that help nonprofits develop a theory of change. We've selected just a few for you below.

Your [state association of nonprofits](#) may also offer educational programs and workshops throughout the year to assist your nonprofit with proactive planning. Plus, [staying current](#) with trends and policy issues that affect nonprofit operations is key to being prepared to adapt to a changing environment.

Practice Pointers

A good way to keep your nonprofit's board engaged is to tie the nonprofit's strategic initiatives to the agenda for board meetings, and to include a short discussion about some aspect of the nonprofit's strategic direction in every board meeting agenda.

Strategy is one of the board's most important roles. BoardSource offers [an array of resources](#) to help boards engage fruitfully in strategic planning.

More About Planning

- [Budgeting for Nonprofits](#)
- [Business Planning for Nonprofits](#)
- [Financial Management](#)

Additional Resources

- Sample [strategic agenda](#) for a board meeting
- Sample [Timeline for Strategic Planning](#) (Nonprofit Association of Washington)
- [BoardSource's strategic planning resources](#) for nonprofit boards
- [The Strategic Plan is Dead: Long Live Strategy](#) (Stanford Social Innovation Review)
- [The Nonprofit Strategy Revolution: Real-Time Strategic Planning in a Rapid-Response World](#) (David La Piana)

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