

Strategic Planning (Not-for-Profit)

Source: The Nonprofit Management Education Center

Permission to present the self-assessment on the BPIR website has been provided by the Nonprofit Management Education Center. For more information on the Nonprofit Management Education Center visit <http://www.uwex.edu/li/learner/index.htm>

How the self-assessment can help BPIR members...

This assessment tool addresses critical management issues within a non-profit organisation. It can be used as a self-assessment tool. It can help you to guide a group discussion about your organisation's strategic planning process. If it is used for a group discussion, each individual should complete the assessment tool. The group ideally should include board members, staff, volunteers, and service recipients.

This is a part of a nine-part series of assessment tools. The other eight parts of the complete Nonprofit Organisational Assessment Tool are:

- Resource Development
- Board Development
- Marketing
- Financial Empowerment
- Social Entrepreneurship
- Volunteer Involvement
- Strategic Alliances
- Outcome Measurement

| These can also be found on the [bpir.com](http://www.bpir.com)

The Self-Assessment

Operational

Indicator	Done?	Needs Improvement ?		
		None/ N.A.	Some	Much
	<input checked="" type="checkbox"/>			
1. The organisation has a written, updated strategic plan.				
2. The organisation periodically reviews its written strategic plan.				
3. If no formal written strategic plan exists, has the organisation convened a meeting to discuss strategic planning and its relevance to the organisation in the past year?				
4. The organisation encourages strategic thinking.				
5. The organisation includes outsiders in the planning process.				
6. The organisation is strongly committed to the strategic planning process.				
7. The organisation has oriented its board, staff and volunteers to the strategic planning process.				
8. The organisation has developed a structure for ongoing board planning and the development of strategic planning skills within the staff.				

Information Gathering and Analysis

Indicator	Done?	Needs Improvement ?		
		None/ N.A.	Some	Much
	<input checked="" type="checkbox"/>			
1. A written strategic plan has been developed by researching the internal and external environment.				
2. The organisation frequently evaluates its relevancy, by soliciting community input. Does its mission and activities provide benefit to the community?				
3. The organisation purchases, or has access to resources that can help it think about changes and trends that will affect the organisation.				
4. Board, staff, service recipients, volunteers, key constituents and general members of the community participate in the planning process.				
5. The strategic plan identifies the changing community needs including the agency's strengths, weaknesses, opportunities and threats.				
6. The strategic plan identifies key constituents, their service expectations, and how the organisation will respond to them.				

Identification of Critical Issues Facing the Organisation

Indicator	Done?	Needs Improvement ?		
	<input checked="" type="checkbox"/>	None/ N.A.	Some	Much
1. The organisation has a planning process that identifies the critical issues facing the organisation.				
2. The organisation takes the time to identify challenges facing the organisation.				
3. The organisation encourages and examines major shifts in the way individuals and the agencies examine problems and opportunities.				
4. The organisation has invested time in identifying potential blocks or impediments that could get in the way of progress.				

Development of a Strategic Vision and Mission Statement

Indicator	Done?	Needs Improvement ?		
		None/ N.A.	Some	Much
	<input checked="" type="checkbox"/>			
1. The organisation has a clear, meaningful written mission statement, which reflects its fundamental purpose, values and people served.				
2. The board and staff periodically review the mission statement and modify it to reflect changes in the environment.				
3. The organisation has developed a vision statement that communicates the organisations "future direction" and desired results.				
4. Does the mission statement duplicate the mission of any other organisation?				
5. Programs of the organisation are congruent with the agency's mission identified in the strategic plan.				
6. The mission statement is widely understood, agreed upon, and communicated, by the board, staff, volunteers, constituents, and community.				

Development of Goals and Strategies

Indicator	Done?	Needs Improvement ?		
	<input checked="" type="checkbox"/>	None/ N.A.	Some	Much
1. The strategic plan sets goals and measurable objectives that address identified critical issues for the next 3-5 years.				
2. The plan integrates all the organisation's activities around a focused mission.				
3. The plan prioritizes the agency goals and develops timelines for their accomplishments.				
4. Strategies have been developed that clearly describe the approach or method for attaining goals and resolving specific issues.				

Development of Operational Plans

Indicator	Done?	Needs Improvement ?		
		None/ N.A.	Some	Much
	<input checked="" type="checkbox"/>			
1. The plan establishes an evaluation process and performance indicators to measure the progress toward the achievement of goals and objectives.				
2. Through work plans, human and financial resources are allocated to insure the accomplishment of the goals in a timely fashion.				
3. The plan is communicated to all stakeholders of the agency -- service recipients, board, staff, volunteers and the general community.				
4. The organisation networks and/or collaborates with other organisations to produce the most comprehensive and effective services to clients.				
5. Stakeholders are involved in the evaluation process.				
6. The evaluation includes a review of the organisational programs and systems to insure that they comply with the organisation's mission, values and goals.				
7. The results of the evaluation are reflected in the revised plan.				
8. Periodically, the organisation conducts a comprehensive evaluation of its programs. This evaluation measures program outcomes.				

Using the Results

First, check the indicators that have been completed or accomplished. Next, indicate the amount of improvement that you think is needed for that indicator (None or Not Applicable, Some, or much improvement needed). If it was used with a group, compare responses and discuss any areas where there were different perceptions.

As a final step, identify the top 2-3 priorities where there was a high level of consensus on an indicator needing "much" improvement. If you are doing this as a group, have each individual select their top three priorities and then tally the "votes" for the group to identify the top three.

Begin developing an action plan that would address these issues (a suggested action plan format can be found at the end of the document). After successfully implementing your action plans that address your top priorities, revisit your assessment results and begin developing action plans for the other indicators that need attention.

Sample Action Plans

Use the following format to begin formulating an action plan that would improve your organisation's performance relative to a specific indicator listed above.

Indicator: *The Organisation purchases or has access to resources that can help it think about changes and trends that will affect the organisation.*

Task	Time Line	Who	Will Do What	Evaluation Measure
Task #1	7 Days	Jim (chair), Claudette, and Jill	Research written publications (Jim), web (Claudette), and other resources (Jill) that would assist with identifying external trends, changes	# of resources identified at next weeks staff meeting.
Task #2	14 days	Jim	Determine costs of resources and/or public access locations.	Number of public access points identified, costs identified for all resources.
Task #3	30 days	Staff - mtg. Called by Jim	Prioritize resources that need to be purchased, and recommend public access points for other resources.	Budget for resources prepared, resources purchased.